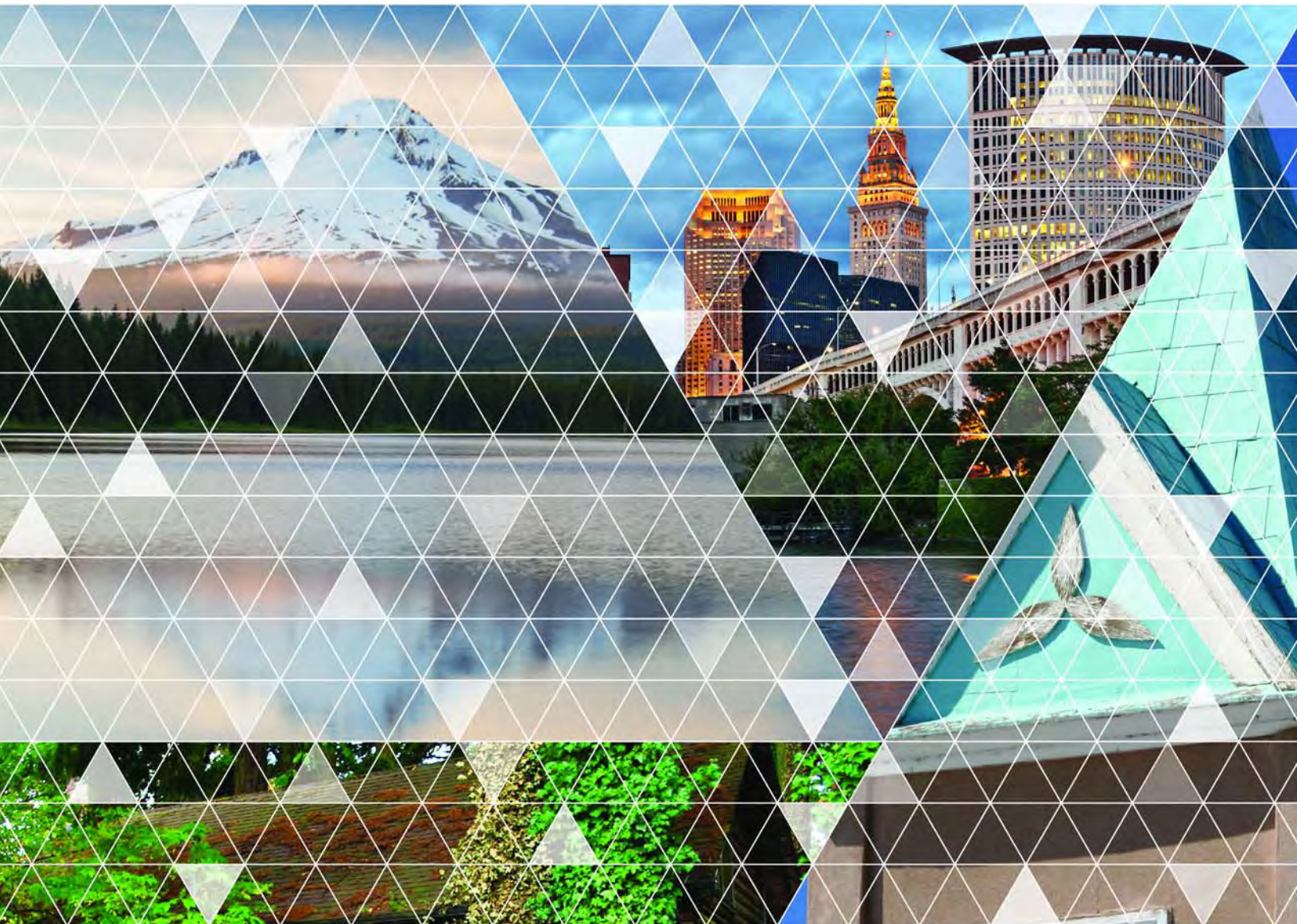


Version 9.3.0

Accela Civic Platform<sup>®</sup>

# User Guide



## **Accela Civic Platform User Guide**

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## Civic Platform Access and Usage

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Choose a topic from the list below to learn more about accessing and using Civic Platform.

### **Related Information**

[Overview](#)

[Logging In](#)

[Changing Your Password](#)

[Setting User Preference](#)

[Signing Out](#)

[Exploring the User Interface](#)

[Navigating the Civic Platform Console](#)

[Using the Search Features](#)

[Understanding QuickQueries](#)

## Overview

---

Because Civic Platform is a web-based application, access and usage on your internet browser is an intuitive process.

What you can see and do when you log in depends on how your agency has configured Civic Platform, as well as your user permissions. Your agency administrators can implement other settings that may affect your interface with Civic Platform.

- Administrators regulate access to the data stored in Civic Platform.
- Administrators manage the maintenance cycle.
- Administrators regulate the functions and tasks that manipulate data.
- Administrators can create unique workflow processes for each user in your organization, enabling users to work more efficiently. For example, permit clerks can display pending tasks and open applications, inspectors can view their list of inspections for the day, and managers can review executive charts for a broader understanding of their department's performance.

## Logging In

You must enter your user login credentials each time you initiate a work session.

If your agency has configured your system to disable accounts that are inactive for a defined period of time, you may need to change your password. See [Changing Your Password](#) for more information, or contact your agency administrator to reset your password.

### To log in

1. Open Internet Explorer web browser.
2. Enter the URL for the Civic Platform Login page in the browser's address bar.



#### Note:

Bookmark the Login page for one-click access in future sessions.

The Civic Platform Login page displays.

3. Complete the following fields.

<b>Agency</b>	Enter the agency name.
<b>User name</b>	Enter the user name assigned to you by your system administrator. Your user name determines the features and functions to which you have access.
<b>Password</b>	Enter your password.
<b>Remember me on this computer</b>	Select this option to retain the agency and user names. If you share a computer, clear this option.

4. If your agency has configured Civic Platform to support multiple languages, select your preferred language from the **Language** drop-down list. Otherwise, skip this step.

5. Click the **Login** button.

The Home page displays.

## Changing Your Password

Change your login password regularly to better secure your system from unauthorized access. Some agencies have password changing protocol that requires users to change their passwords on a timed schedule (for example, every 60 days). If you do not change your password within the specified time frame, Civic Platform locks you out, and you must either change your password or have an administrator do it for you. To help you remember to change your password, Civic Platform displays daily warnings about an impending password expiration date starting 15 days before expiration.

You can change your password at login or from within Civic Platform (if configured).

### To access the Change Password page from the Login page

1. At the login page, log in as usual.  
A message displays, informing you that your password is expiring soon. The message asks whether you want to change the password now.
2. Click **OK**.  
The Change Password page displays.
3. Complete the fields as described in [Complete the following fields](#). below.

### To change your password from within Civic Platform

1. Navigate to your Home page.
2. Open the Preference portlet. If you do not see this portlet, contact your system administrator.
3. Click the Change Password tab.

4. Complete the following fields.

<b>Old Password</b>	Enter your current password.
<b>New Password</b>	Enter a new password that meets your agency's security requirements. Use the Requirements link to the right of the password strength indicator to view your agency's minimum password requirements.
<b>Confirm New Password</b>	Re-enter your new password to confirm it.

5. Click **Submit**.



## Setting User Preference

If you have access to multiple modules (such as Licensing and Enforcement) and/or you have access to multiple consoles, you can define your default workspace in **Preferences**. When you define a default module and console, those selections are what you see each time you log in. You can switch to other modules and consoles when you need them.

However, if you prefer to see all records from all modules by default, instead of seeing only those records available in your default module, you can turn off the default module filter. To do so, set the Standard Choice DISABLE\_RECORDLIST\_DEFAULT\_MODULE value to Yes.

Please refer to the *Accela Civic Platform Configuration Guide* for more information on setting this Standard Choice.

### To set user preferences

1. Navigate to your home page.
2. Open the Preference portlet. If you do not see this option, contact your agency administrator.
3. Click the Preference tab (if not already displayed).

The Preference portlet displays

4. Complete the fields.

#### Default Module

Select a default module from the drop-down list. When you log in after saving your preference, you see only records for the default module.

#### Default Console

Select a default console from the drop-down list. When you log in after saving your preference, you see only the portlets and the module in the customized console.

5. Click **Submit**.

## Signing Out

---

It is important to sign out properly when you finish your work in Civic Platform. Signing out ensures that other users cannot engage in activity that they do not have permission to do. Signing out also prevents other users from seeing information that they do not have permission to see.

### To sign out

1. Locate and click the **Sign Out** link in the upper right-hand corner of your console.

### Session Timing Out

Civic Platform has a built-in session timeout mechanism. If your session is inactive for a set period of time, the session times out and Civic Platform automatically signs you out. If your administrator configures a session time-out warning, you have the option to continue the session before it times out.

## Exploring the User Interface

Civic Platform provides a common interface for users across an agency. However, Civic Platform also provides users with the ability to personalize the interface somewhat to meet individual needs. In addition, administrators can define user access to functionality and data based on a user's job duties. For both of these reasons, you may notice that Civic Platform displays differently on your machine than it does for other users. You may also notice that your console differs from the descriptions in this manual. The differences may be due to personalization and permissions, but the differences may also be due in part to how your agency has elected to configure Civic Platform.

In spite of all the potential differences, Civic Platform consoles have some elements and features that are common to all. This section discusses those common elements.

### Topics

- [Introducing the Console](#)
- [Menu Icons and Buttons](#)

### Introducing the Console

The console refers to the entire working area of your browser that comprises Civic Platform. The console includes an agency bar, toolbars, main links, portlets, record tabs, and detail forms. The console lets you interact with Civic Platform and its add-ons by clicking the main links and working in associated portlets. The following figure shows an example of a console and its associated parts.

The screenshot displays the Civic Platform console for the City of Petaluma. The interface is annotated with orange arrows and labels pointing to various components:

- agency bar:** Points to the top header area containing the agency name "CITY OF PETALUMA", the user name "Administrator J TEST1", and navigation links like "My Console", "Console Options", and "Sign Out".
- toolbar:** Points to the navigation bar with buttons for "HOME", "NAVIGATION", "CREATE NEW", and "MAPS".
- main links:** Points to the horizontal menu of application categories such as "Home", "Admin", "Classic Admin", "Building", "Inspections", "Addresses", "Parcels", "Owners", "Contacts", "Professionals", "GIS", "Activities", "Reports", and "Global Search".
- portlet:** Points to the main content area, which is a "Record" portlet displaying a table of records.
- console:** A large bracket on the right side of the screenshot encompasses the entire working area from the toolbar down to the bottom navigation.

The "Record" portlet contains a table with the following data:

Alternate ID	Created By	First Name	Last Name	Description	Record ID	Record Type Alias
12CAP-00000023	ADMIN				12CAP-00000-0000S	Building/Commercial/Land/
12BLD-00000-00010	ASMITH	Kevin	Karick	Commercial Addition	12BLD-00000-00010	Commercial Addition
12BLD-00000-00011	ASMITH	Kevin	Karick	Commercial Addition	12BLD-00000-00011	Commercial Addition
12CAP-00000017	PUBLICUSER1538				12CAP-00000-0000K	AchieveInspectionTest
COM-1200009	PUBLICUSER1538	canon	wu		12BLD-00000-00008	Commercial Addition
12CAP-00000014	PUBLICUSER1538				12CAP-00000-0000H	ACA Training
12CAP-00000015	PUBLICUSER1538				12CAP-00000-0000I	ACA Training
12CAP-00000013	PUBLICUSER1538	canon	wu		12CAP-00000-0000G	ACA No ASI ASIT
12CAP-00000-0000L	ASMITH	Amber	Smith		12CAP-00000-0000L	Chemical 1
12BLD-00000-00009	PUBLICUSER1538	canon	wu		12BLD-00000-00009	Commercial Addition

Below the table, there is a "Building Permit ID: 12CAP-00000013" section with a "Menu" and "Help" button. At the bottom, there is a "Go To" dropdown and a series of tabs: "Summary", "Permit", "Activities (0)", "Activity Summary (1)", "Address (0)", "Addtl Info", "App Specific Info", and "App Specific Info Tables (0)".

**Agency Bar.** Displays the agency name and user name, and provides links that enable users to customize their work area, access alerts, and sign out.

**Toolbar.** Displays the **Home**, **Navigation**, **Create New**, **Maps**, and **Help** buttons. The **Maps** button does not display if your agency does not configure Civic Platform - GIS.

**Main Links.** Customizable links at the top of the console that direct you to different areas of Civic Platform. Click a main link to display its associated portlets in the console. Use the Console Editor to add or remove main links and to customize the associated portlets.

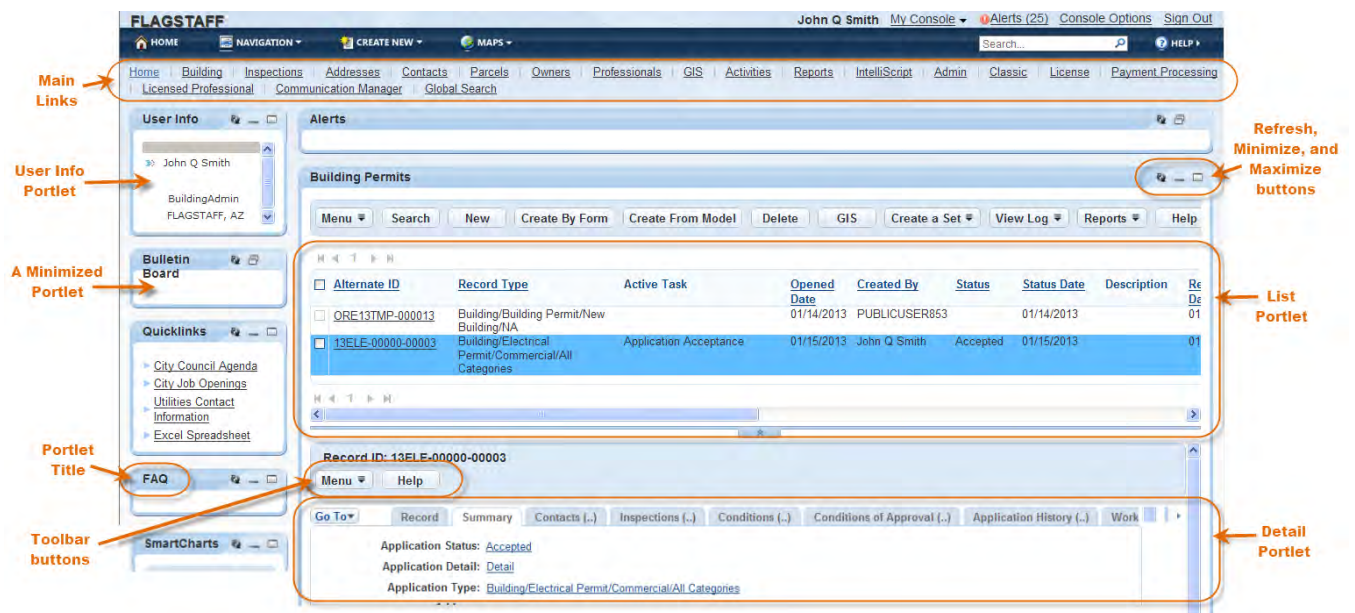
**Portlet.** A section of the web page dedicated to display information or perform tasks.

**Record Tabs.** After selecting a record, there are several available tabs you can click to open a portlet containing additional record details.

**Console.** The entire working area of the page, also known as the user interface.

## Menu Icons and Buttons

Civic Platform has many commonly used buttons and controls located throughout the software. You can see some common features in the illustration below.



**Main Links.** Click links to view a console page and its associated portlets.

**User Info portlet.** This portlet displays on the left side in the vertical portlet, and includes information about the current login user.

**A minimized portlet.** The Quicklinks displays as a minimized portlet. A minimized portlet only displays the portlet header. Maximize the portlet to view the title bar and portlet contents.

**Portlet Title.** Each portlet has a title bar that includes the portlet name.

**Refresh, Minimize, and Maximize buttons.** These buttons appear on the far right of the portlet title bar. See [Portlet Buttons](#) below to learn how these buttons work.

**List portlet.** List portlets contain lists of items. The Building Permits portlet is an example of this type of portlet. You can select a record in a list portlet and view the record details below.

**Toolbar buttons.** Use the buttons on the portlet toolbar to work with data in that portlet. Which buttons are available varies by portlet. See [Portlet Buttons](#) below to learn how these buttons work.

**Record Detail Area.** Click a tab to reveal detailed information about the record selected in the list portlet.

## Portlet Buttons





Users can click a button to initiate many of the actions that you can perform in Civic Platform. This section lists and defines some of the common use buttons you may encounter when you are working in Civic Platform.

- [Portlet Control Buttons](#)
- [Portlet Menu Buttons](#)
- [Portlet Toolbar Buttons](#)

## Portlet Control Buttons

The portlet control buttons appear on the right side of the portlet title bar. Use these buttons to manipulate the portlets as described below.

Table 1: Portlet Control Buttons

Icon	Button Name	Description
	<b>Minimize</b>	Collapses the portlet so that you see only the title bar, which can be helpful when managing the space on your console. For example, when you want more real estate to view other portlets on a page, you can minimize portlets you are not using.
	<b>Maximize</b>	Expands a portlet from the title bar view so that the portlet completely fills the window.
	<b>Restore</b>	Restores an expanded portlet view.
	<b>Refresh</b>	Updates the portlet and view the most current information.

## Portlet Menu Buttons

The menu buttons are time-saving objects that give you quick access both to available commands, and to available detail tabs for the current record. System administrators can customize both the GoTo drop-down list and the Menu drop-down list for each portlet.

Table 2: Portlet Menu Buttons

Menu Name	Description
<b>Go To</b>	Displays a menu that lists the available record detail tabs. Click a tab name to navigate to the area without scrolling.
<b>Menu</b>	Many portlets have a menu button that opens a drop-down list of actions. These menus are portlet-specific.

## Portlet Toolbar Buttons

Each portlet has a unique set of toolbar buttons you can use while working in the portlet. The following list of toolbar buttons describes some of the most common buttons you may see as you work in Civic Platform. Button names display in alphabetical order.

Table 3: Toolbar Buttons

Button Name	Description
<b>Cancel</b>	Cancels the current action.
<b>Clear Search</b>	This button becomes available in the toolbar after you perform a search. Use this button to clear the search fields so you can enter new criteria.
<b>Customize</b>	Use this button to access the console editor, where you can access tools to customize your console.
<b>Delete</b>	Use this button to delete one or more selected records.
<b>GIS</b>	If your agency uses Accela GIS, use this button to access GIS.

Button Name	Description
<b>Help</b>	Use this button to access online help. If you click the button within any portlet, online help displays a relevant topic or list of topic options.
<b>Logout</b>	Use this button to sign out of Civic Platform.
<b>Look Up</b>	Use this button to look up an address and view its associated information.
<b>New</b>	Use this button to create a new record.
<b>Refine Search</b>	This button becomes available in the toolbar of the search results list after you perform a search. Use this button to return to the search page without clearing any of the previously entered search criteria.
<b>Report</b>	Use this button to print a corresponding customizable report associated with the record.
<b>Reset</b>	Use this button to remove any data entered and return to the previously saved data (or lack of data) on a form.
<b>Save</b>	Use this button to save newly entered data to the database.
<b>Search</b>	Use this button to open a search form where you can enter search criteria to search for a needed record or object.
<b>Submit</b>	Use this button to submit new information to the Civic Platform database.
<b>Summary</b>	Use this button to display a summary form.

## Navigating the Civic Platform Console

You can access frequently used portlets and record forms from the Civic Platform console by using the toolbars, main links, and administrative setup menu.

### Topics

- [Using Toolbars](#)
- [Navigating with Main Links](#)
- [Accessing Recently Viewed Items](#)
- [Working with Data Fields](#)
- [Using the Spell Checker in Text Fields](#)

### Using Toolbars

Civic Platform provides two toolbars:

- The Agency toolbar provides links to personalized alerts and console customization portlets, as well as a link for signing out of Civic Platform. Some agencies configure the toolbar to display the agency name and even display user information.
- The Civic Platform toolbar provides numerous buttons you can use to move efficiently to the most frequently used areas of the software. The toolbar includes a search box you can use to initiate global searches for information. See [Performing a Global Search](#) for more information about global searches.



**Figure 1: Toolbars**

**Home button.** Use this button to return to your personalized home page.

**Navigation button.** Use this button to display and select from a drop-down list of recent items you worked on (with the exception of deleted items), most recent first. Selecting an object in the list opens the record for that object.

**Create New button.** Use this button to display and select from a drop-down menu of objects you can create, such as records or portlets.

**Maps button.** Use this button to launch Civic Platform - GIS). This button displays only if your agency configures GIS.

**Switching Consoles.** Use this link to switch between consoles, if your login account has sufficient permissions.

**Search.** Use to initiate global searches for any record ID, asset ID, contact name, address, parcel number or project name.

**Console Options.** Click this link to modify your console. You can add or remove main links and portlets.

**Help button.** Click this button to launch online help.

### Navigating with Main Links

You can use any of the links within the main links area on your console to access administrator and user portlets to which you have access. For example, you might see an Admin link that takes you to administrator portlets, or a Calendar link that takes you to the Calendar portlet.

## To access portlets using main links

1. Navigate to the home page.
2. Look below the Civic Platform toolbar to locate the main links area.
3. Click the link associated with the portlet you want to open.

The portlet associated with the main link displays.



### Note:

You can associate a main link with multiple portlets; for example, the Addresses, Parcels, and Owners portlets. When you click this type of main link, all the associated portlets open from top to bottom, and the first enabled text field in the first non-list portlet gets focus.

## Accessing Recently Viewed Items

Use the **Navigation** button in the toolbar to access a drop-down list of the most recent records/objects you viewed or worked with in Civic Platform, newest to oldest (deleted objects not included). Each object listed is a hyperlink that you can click to open the named object or record.

You can clear the recently viewed list at any time by clicking the “clear history” link at the bottom the list.

### To access recently viewed items

1. Navigate to the home page.
2. Click the **Navigation** button on the toolbar.  
A drop-down list of recently viewed records and objects displays.
3. To display a record or object in the list, click the identification number corresponding to the recent item that you want to work with from the list.



The record or object in the portlet most recently used to work with that object, displays.

## Working with Data Fields

Whether you are entering, editing, or viewing information in Civic Platform, you interact with several different types of fields.

### Alphanumeric fields

Use an alphanumeric field to enter a string of characters and/or numbers as prompted by the field label. For example, the Address field is an alphanumeric field. The field label, Address, cues you to enter an address in that field. Alphanumeric text fields usually have a character limit that dictates how many characters that the field accepts. Consult your system administrator if you want to learn the character limit of a text field.



## Scrolling text fields

Use a scrolling text field to enter narrative information as prompted by the field label. For example, a field labeled Description may appear. Use it to enter a description of the object named in the record. A scrolling text field allows you to enter more text than a standard text field. You can type entire sentences, and even use the Enter key to create paragraphs or lists.

Many scrolling text fields have a spell checker available below the field. Use the spell checker to check the text you entered in the scrolling text field for spelling accuracy. See [Using the Spell Checker in Text Fields](#) for more information about this tool.

## Drop-down lists

Use a drop-down list field to select from a list of pre-defined options. You can locate and select an option in one of three ways:

- Click the caret to view a drop-down list of options. Use the scroll bar to move through the list of options. Click the option you want to select it.
- Press the Tab key on your keyboard to advance to the drop-down field. With the field highlighted, press the down arrow on your keyboard to scroll through the available options one at a time. When you see the option you want, press Tab to move to the next field.
- Move the cursor to the drop-down field. Enter the first letter of the option you are looking for to jump to that option. If there is more than one option that starts with the letter, enter the letter again. For example, if you are in the Country field and you want to select Andorra, press the A key to jump to the first country name beginning with the letter A. Press the A key again and again until Andorra displays. Press Tab to move to the next field.

## Check boxes

When you see a check box, you can click the box to enable (or select) that option. Click the box again to disable the option.

## Date fields

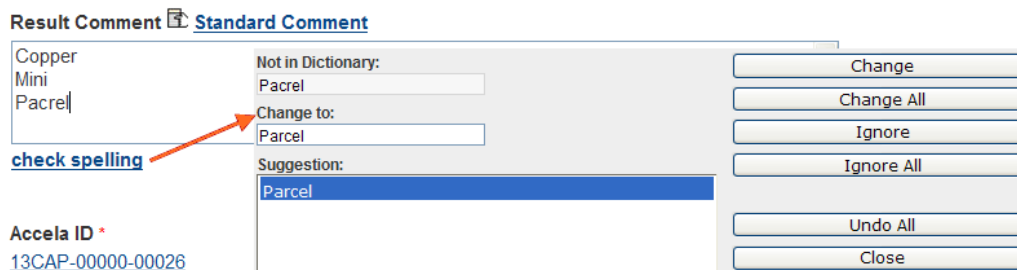
Use a date field to enter dates in the format prescribed by your agency. For example, your agency may configure date fields to accept dates in the format mm/dd/yyyy. You can enter the date manually using the prescribed format. You can also click the calendar icon to the right of the field to launch a calendar tool that enables you to select a date.

Jan 2013							
Today							
WK	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1			1	2	3	4	5
2	6	7	8	9	10	11	12
3	13	14	15	16	17	18	19
4	20	21	22	23	24	25	26
5	27	28	29	30	31		
6							

The current date is highlighted. Use the << and >> buttons to display the same month in the next/previous year. Use the > and < buttons to display the next/previous month. To choose a different day, click the date you want.

## Using the Spell Checker in Text Fields

You can use the spell checker to identify spelling errors and correct spelling as needed. When enabled, the spell checker displays under all scrolling text fields as shown below.



**Figure 2: Inspection Result Comment with spell checker**

Civic Platform uses a standard dictionary for all spell checking. Agencies can create custom dictionaries at the agency level to incorporate industry or agency-specific terminology as entries, and make them available to users in Civic Platform. When there is a custom dictionary available, Civic Platform uses both the standard dictionary and the custom dictionary as references when a user invokes the spell checker.



### Note:

Civic Platform supports custom dictionaries for the English language only.

### To check the spelling within a text field

1. Click the **check spelling** link located under the text field.  
The Spell Check window displays, with the first suggested correction highlighted. If there are no spelling errors, a pop-up message displays, indicating the spell check is complete.
2. Use the buttons in the spell checker to check/correct your spelling. See [Spell Check Fields and Buttons](#) for more information.
3. When the spell check is complete, a message displays, informing you that it is complete.



### Note:

The spell checker does not currently allow you to add new words to the dictionary from the spell checker window.

4. Click **OK**.

Table 4: Spell Check Fields and Buttons

<b>Change</b>	Use to replace the word in the <b>Not in Dictionary</b> field with the word in the <b>Suggestion</b> field.
<b>Change All</b>	Use to replace all instances (within the current field) of the word in the <b>Not in Dictionary</b> field with the word in the <b>Suggestion</b> field.
<b>Change To</b>	Displays the word you plan to use in place of the word in the <b>Not in Dictionary</b> field. You can type another word into this field, or select a word from the Suggestion list.
<b>Close</b>	Use to close the spell check window without applying changes.
<b>Ignore</b>	Use to leave the word in the <b>Not in Dictionary</b> field as it is. For example, if the word in the <b>Not in Dictionary</b> field is an acronym or abbreviation, you can click the <b>Ignore</b> button to skip to the next misspelled or unrecognized word.
<b>Ignore All</b>	Use to leave all instances of the word in the <b>Not in Dictionary</b> field as is.

---

<b>Not in Dictionary</b>	This read-only field displays the misspelled word or unrecognized word. If the text field you are spell checking contains multiple misspelled words, each misspelled word displays in the <b>Not in Dictionary</b> field in turn.
<b>Suggestion</b>	This field displays words that the spell checker recommends to replace the word in the <b>Not in Dictionary</b> field.
<b>Undo All</b>	Use to remove all applied changes and automatically close the window.

---

## Using the Search Features

Civic Platform offers users both a global search feature and a portlet-specific search feature. Use the search tools to locate records and objects throughout the database.

### Topics

- [Performing a Global Search](#)
- [Performing a Portlet Search](#)

### Performing a Global Search

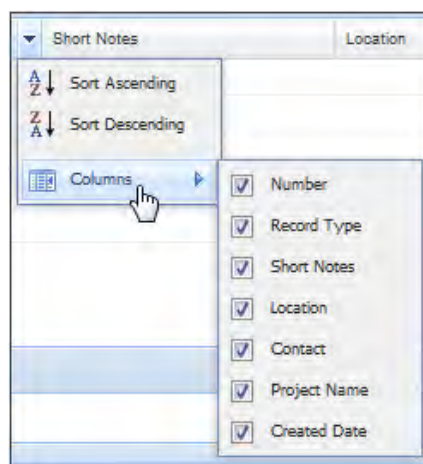
Civic Platform offers a global search engine that you can use to specify search criteria and locate the records that meet the criteria in a global scope. The global search checks in the following portlets for records that contain a field with the same value as entered in the global search field.

- Records
- Assets
- Locations (including addresses, parcels, and owners)
- Licensed Professionals
- Documents
- Contacts

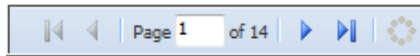
With some portlets such as the Records portlet or Parcels portlet, the global search not only searches in the list portlet, but also the associated tabs. A global search returns not only the result records but also any associated records meeting the search criteria.

Search results display in a Global Search portlet where they are sorted in groups based on type.

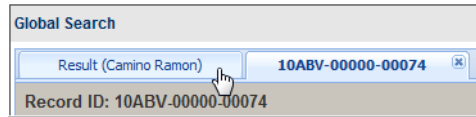
You can further organize the search results by applying filters to the results set. Filter the records by module, if available. Click a column header to sort records by that column in ascending or descending order. You can also click the arrow next to the column header to access a drop-down menu with sorting and display options.



If you have a large number of records in a group, use the navigation tools at the bottom of the group list, as shown. Use the arrows to view another page of results. Enter a page number to jump to a given portion of the list.

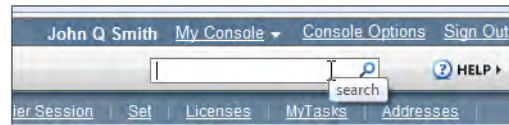


You can click any search result hyperlink to access record (object) details. Your search results remain available and you can return to that list at any time by clicking the Result (main) tab as shown.



### To perform a global search

1. On the Civic Platform home page, locate the **Search** field in the upper right corner, as shown.



2. Enter the name, place, or other character string you want to search for, and press **Enter** to initiate the search.

A list of search criteria (fields) that you can use to do global searches is available in [Fields to Search in Global Search](#).

The search results display.

The screenshot shows the Global Search results page. At the top, there are tabs for 'Result (Smith)', 'Records(675)', 'License Professionals(29)', and 'Contacts(1)'. Below the tabs is a 'Filter records by the module:' dropdown menu. The main content area displays a table of records with columns: Number, Record Type, Short Notes, Location, Contact, Project Name, and Created Date. Below the table, there is a pagination control showing 'Page 6 of 135'. Below the pagination, there is a 'Go to top' link and a section for 'License Professionals' with a table of license information. At the bottom, there is another 'Go to top' link and a section for 'Contacts'.

Number	Record Type	Short Notes	Location	Contact	Project Name	Created Date
<a href="#">06PZII-00000-00004</a>	Planning/Zoning/Rezoning/PUD		2901 E LOCKETT RD, SUNRISE, AZ 86004	Sarah Peoples		01/24/2006
<a href="#">06PZII-00000-00003</a>	Planning/Zoning/Rezoning/PUD		2809 E LOCKETT RD, SUNRISE, AZ 86004			01/24/2006
<a href="#">06PZII-00000-00002</a>	Planning/Zoning/Rezoning/PUD		1816 E MAPLE, FLAGSTAFF, AZ 86004			01/17/2006
<a href="#">06PZII-00000-00001</a>	Planning/Zoning/Rezoning/PUD		1816 E MAPLE, FLAGSTAFF, AZ 86004		SouthBranch...	01/16/2006
<a href="#">05PZII-00000-00010</a>	Planning/Zoning/Rezoning/PUD		3312 N WALKER ST, SUNRISE, AZ 86004	Edward Joe Nieto		10/06/2005

State License #	License Type	Business Name	Address	License Issued On	License Expires On
<a href="#">0140520</a>	CONTRACTOR	DONPEDRO'S TERMITES CONTROL CO	637 - 17TH STREET FL...	01/01/1999	10/31/2007
<a href="#">015333</a>	CONTRACTOR	WHITE ELECTRIC COMPANY	1821 UNIVERSITY AVE...	01/01/1999	04/30/2004
<a href="#">022726</a>	CONTRACTOR	RANSOME COMPANY	1933 WILLIAMS STREE...	01/01/1999	10/31/2004
<a href="#">082540</a>	CONTRACTOR	ANDERSON, ERIC F. INC.	1066 BEECHER ST FLA...	01/01/1999	09/30/2005
<a href="#">095935</a>	CONTRACTOR	HEATHORN N.V., INC.	1155 BEECHER STREET...	01/01/1999	08/31/2005

### To navigate the Global Search Results

1. Click a group link name to view the corresponding group result portlet. For example, click **Contacts** to view the list of Contact records meeting your search criteria.
2. Use the Filter Records by the Module filter, if available, to winnow the results set to a particular module.
3. Use the navigation tools to view additional pages of results as necessary. Note that each group of results has its own set of navigation tools.
4. Click any search result hyperlink to access record (object) details. Click the **Result** tab to return to the Search Results list.

Table 5: Fields to Search in Global Search

Portlet	Associated Tab	Fields to Search
Records	-	Record ID, Alternative ID, Project Name, Module, Asset
	Assets	Asset ID
	Address	Street # (Start), Start Fraction, Direction, Street Name, Street Type, Unit Type, Unit # (start), City, State, Zip Code, Address Line 1 and Address Line 2
	Parcel	Parcel#
	Owner	Name
	Professionals	License#
	Contacts	Contact Organization Name
	Documents	File Name, document description, Document Category, Document Group
Assets	-	Asset ID
Addresses	-	Street # (Start), Start Fraction, Direction, Street Name, Street Type, Unit Type, Unit # (start), City, State, Zip Code, Address Line 1 and Address Line 2
	Parcels	Parcel#
Parcels	-	Parcel#
	Owner	Owner Name
	Address	Street # (Start), Start Fraction, Direction, Street Name, Street Type, Unit Type, Unit # (start), City, State, Zip Code, Address Line 1 and Address Line 2
Owners	-	Owner Name
	Parcel	Parcel#
Licensed Professionals	-	State License#, First Name, Middle Name, Last Name, Full Name
Contacts	-	Contact Organization Name, Contact DBA/Trade Name, Email Address, Phone Number, Contact Full Name, Contact First Name/Middle Name/Last Name
Documents	-	File Name, Document Description, Document Category, Document Group

## Performing a Portlet Search

Many Civic Platform portlets offer a robust search feature that you can use to search for records or objects within that portlet. For example, if you need to update the phone number for a contact in the database, you can use the Search feature in the Contacts portlet to locate and open the contact record so you can update it.

When you do a portlet search, you can enter search criteria in a number of fields, including application-specific information (ASI) fields and ASI table fields, to help you locate the record or object you need. Civic Platform always joins search criteria by using the "AND" operator between the fields.

You can use wildcard characters in portlet searches, which can be especially useful if you are unsure of the spelling of a person's name or a street name.

**Note:**

You may customize the display of the search form with the **Edit View** feature. See [Editing Your View](#).

You can use Soundex search functionality to do phonetic searches on contact and address (street name) searches (see [Using Soundex to Conduct a Phonetic Search](#)).

**Topics**

- [Using Soundex to Conduct a Phonetic Search](#)
- [Performing a Wildcard Search](#)
- [Performing an Advanced Search](#)

**To search for a record or object**

1. Navigate to the portlet containing the records or objects you want to locate; for example, the **Service Requests** portlet.
2. Click **Search** or **Look Up**, depending on the user interface.  
The Search form displays.
3. Enter search criteria as available. You can search on one criterion or on multiple criteria. The more specific you are in your search criteria, the better your search results are. Civic Platform supports wildcard searches for many fields.

**Note:**

For more information about wildcard searches, see [Performing a Wildcard Search](#) below.

- If you are searching on contact information or address (street name) and you want to enable a phonetic search for similarly spelled values, select the **Enable Soundex Search** option.
  - If a template field (for example, Activity Type in the search form for reference contacts) is a search field in the search form, after you specify the template, all the fields associated with the template display as search fields.
  - If **Attribute Label** and **Attribute Value** are search fields in the search form, you can enter the label and value of a field that belongs to an activity-specific info group. Note that you must enter the label and value together.
4. Click **Submit**.  
The search results display.
  5. If you do not see the record or object you need, click **Refine Search** and enter different search criteria. You can also click **Clear Search** to clear all the search fields.
  6. Click the ID link of the desired record or object to view or edit the details.

**Using Soundex to Conduct a Phonetic Search**

Soundex is a phonetic algorithm for indexing names by sound, as pronounced in English. In other words, a Soundex search identifies search matches based on the way they sound rather than the spelling, taking into account common misspellings. For example, a search on the name “Lee” might return values such as Lee, Li, Lea, or other similar matches.

**Note:**

Soundex functionality is available for English only.

Soundex search functionality is available on Civic Platform portlet search forms that include an address (street name) field or common contact name fields, such as contact last name, and contact business name. The following fields are searchable using Soundex search.

- Contact First Name
- Contact Middle Name
- Contact Last Name
- Contact Organization Name
- Contact DBA/Trade Name
- Contact Business Name2
- Contact Alias/Alternate Names - First Name, Middle Name, Last Name (Contact - Also Known As tab)
- Address Street Name

### To enable Soundex searching

1. Launch a search from the reference contact portlet, the related contact portlet, the record list portlet, the inspection list portlet, or other portlet with Soundex search. See [Performing a Portlet Search](#).
2. In the toolbar, select the **Enable Soundex Search** option.
3. Enter search criteria as needed to return the desired search results. A Soundex icon displays next to each Soundex-searchable field to help you identify them. You can also consult the list of Soundex-searchable fields in the introduction to this section.

A Soundex search proceeds, using the search criteria that you entered. Returned results include both exact and near matches.

### Performing a Wildcard Search

A wildcard is a special character (%) you can use in your search criteria to represent one or more characters in a string of characters. When used, it can represent an undefined value.

Where you place the wildcard character determines which part of the name or phrase you are not searching for. For example, you are searching for an owner with the last name equal or similar to Johnson. You can enter *%son* as the search criterion. The search results include all names it finds ending in “son,” including Johnson and Thompson. If you enter *john%*, the search results include all names beginning with “John,” including Johnson, Johnston, and Johns. If you enter *%john%* and click search, the results include all names with “john” anywhere within the whole name, including Johnson, or St. Johns.



#### Note:

Wildcard searches are not available for all fields.

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### Performing an Advanced Search

If you perform advanced search with multiple fields, the search follows the following general rules:

- If you conduct a search based on two or more detail search fields, Civic Platform uses AND to locate that contain all the search criteria. For example, if you pick two fields within the record detail search fields, this rule is applied.
- If you conduct a search based on fields across different categories (for example, between record search fields and Address, Parcel, Owner (APO) template search fields), Civic Platform uses AND to perform the search.



- If you conduct a search based on two or more Task Spec Info, App Spec Info, or APO template search fields, Civic Platform uses AND to locate records that contain only one of the search criteria.
- If you conduct a search based on two fields from the record detail search and the APO template, Civic Platform uses AND and OR to perform the search.

## Understanding QuickQueries

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### Topics

- [QuickQuery Overview](#)
- [Applying an Existing QuickQuery to a List Portlet](#)
- [Creating a New QuickQuery](#)
- [Modifying or Deleting an Existing QuickQuery](#)
- [Understanding the QuickQuery Form](#)

### QuickQuery Overview

A QuickQuery is a pre-defined search/filter that you can use to quickly access a list of items that meet certain conditions. For example, you can set up a QuickQuery that displays a list of records assigned to a certain department or even a certain individual. Your agency administrator may set up QuickQueries and make them available for your use, or you can create your own QuickQueries.

QuickQueries are available for use in a number of portlets. If available, you will see a My QuickQueries button in portlet toolbar and a My QuickQueries command in Menu command list.

When you set up multiple QuickQueries, you can assign one query as the primary (default) query. When you designate a QuickQuery as primary, Civic Platform automatically applies that QuickQuery each time you open the list portlet or tab.



#### Note:

Data filters remain in place when you apply a QuickQuery. Any fields or values that a data filter excludes, remain excluded.

---

### Applying an Existing QuickQuery to a List Portlet

1. Navigate to the portlet you want to work in.
2. From the **My QuickQueries** drop-down list in the portlet toolbar, choose the desired query.
  - To apply the QuickQuery to a particular module, select a module from the **Module** drop-down list.
  - To apply the QuickQuery to all available modules, select "--Select--" from the **Module** drop-down list.
  - To filter the contents of other list portlets besides the record list portlets, select the desired QuickQuery from the **My QuickQueries** drop-down list.
  - To remove all QuickQuery filters from the list, choose --Select-- from the **My QuickQueries** drop-down list.

The list updates to display only those records that match the QuickQuery specifications.

### Creating a New QuickQuery

You can set up a QuickQuery that reflects your own needs.



#### Note:

When creating a QuickQuery, you can use wildcards for some values. For example, if you want to build a QuickQuery that finds all records related to work on water mains, you can enter "**Water/Main//**" where //is the wildcard.

---

1. Navigate to the portlet you want to work in.
2. Hover over the Menu button to display a menu, then choose **My QuickQueries** from the menu.
3. Click **New**.  
A blank QuickQuery form displays.
4. Complete these fields (a red asterisk means it is a required field):

<b>Name</b>	Enter a name for the QuickQuery. The name you enter appears in the QuickQuery drop-down list, so make sure the name is concise and meaningful.
<b>Description</b>	Enter a description to help you identify the purpose of the QuickQuery.
<b>Primary</b>	This field is optional. Select <b>Yes</b> to designate the current QuickQuery as the primary. The default setting is <b>No</b> . Only one QuickQuery can be primary at any given time. If you assign another QuickQuery as the primary, Civic Platform automatically resets the Primary field for all other QuickQueries to <b>No</b> .

5. Use the **Search By** section to build your query as described below.

- a. Use Box A only if you are creating an extremely complex query that requires parentheses to group operations properly. For most QuickQueries, you can leave this box blank.
- b. Use Box B to choose the portlet field that you want to use to build your query.



**Note:**

The current portlet sets the available filter fields:

The filter fields for Record List portlet include all the record fields that display in the record search form, Application-Specific Info, Address Template, Owner Template, Parcel Template, and Module Name.

The filter fields for the Reference Address (Parcel, or Owner) Portlet include the address (parcel, or owner) fields, and Address Template (Parcel Template, or Owner Template).

The filter fields for other portlets are the fields that display in the search form of each portlet.

If you select Application-Specific Info (ASI) as the filter field in the drop-down, Civic Platform displays all the ASI groups in a pop-up window. Select an ASI group code from the ASI Group Code field, and then find and click the desired ASI field in the ASI Field tree to specify the field you want to filter.

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

- c. Use Box C to choose the Relational Operator you want to use. For a list of available operators, see [Default Relational Operators](#).
- d. Use Box D to specify the variable or specific value against which you want to compare the field in Box B. You can manually enter a value into this field, or you can click the Variable Picker button to the right of the field and select a variable from the Variable list. For a list of variables, see [QuickQuery Parameters](#).
- e. If you select a user-name-related field, such as Requestor, as the filter field, Civic Platform displays three fields where you can specify the first name, middle name, and last name of a person, instead

of one Value field. For a list of user-name-related portlets and filter fields, see [User-Name-Related List Portlets and Search By Fields](#).

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

- f. Use Box E only if you are creating a complex query that requires parentheses to group operations properly. For most simple QuickQueries, you can leave this box blank.
  - g. If you are querying additional fields (for example, you want to query by date and/or by location), choose a logical operator in the fourth field to determine how you want to combine the fields. Choose **AND** if you want the query to use both this field and the next field to find matches. Choose **OR** if you want the query to use either this field or the next field to find matches.
6. If you are querying another field (see step 5f), click the **New Field** button. Otherwise, go to the next step.
- Civic Platform adds a new Search By row below the one you just created.
- a. Repeat steps 5 and 6 for each additional field you want to add. When you have finished adding fields, continue to step 7.
7. Click the **Preview SQL** button to view the SQL query statement in the Resulting Query field, which can help you identify any potential syntax problems before you save.
8. Click the **Submit** button.
- The QuickQuery is now available in the current portlet.

Table 6: User-Name-Related List Portlets and Search By Fields

List Portlet	Search By Field
AMS Asset CA List	Inspector
AMS PM Schedule Log List	Processed By Staff
Inspection Conditions of Approval List	Action by User Applied by User
Inspection List	Inspection Contact Name Inspector Requestor
My Workflow Task List	Action By (Staff)Assigned to Staff
Record Conditions of Approval List	Action by User Applied by User
Record Inspection List	Inspection Contact Name Requestor

List Portlet	Search By Field
Set Conditions of Approval List	Action by User Applied by User

## Modifying or Deleting an Existing QuickQuery

You can modify or remove QuickQueries you created as needed. However, QuickQueries created by administrators are read-only and are not editable.

### To modify or delete a QuickQuery

1. Navigate to the portlet you want to work in.
2. Hover the mouse on the Menu button to display a menu.
3. Choose **My QuickQueries** from the menu.  
A list of QuickQueries displays for the current portlet.
4. Click the link for the query you want to modify/delete.
5. If modifying the query, update as needed. Click **Delete Field** to remove fields from your query as needed.
6. To delete the query, click **Delete**.

### Understanding the QuickQuery Form

You can use parameters to build queries on the QuickQuery form.

Table 7: QuickQuery Parameters

Variable	Description
<b>\$\$DEPARTMENT\$\$</b>	The department to which the current user belongs.
<b>\$\$GAUSER ID\$\$</b>	The logged in user's ID.
<b>\$\$GROUP\$\$</b>	The logged in user's user group.
<b>\$\$MODULE\$\$</b>	The name of the module for which the query is applicable.
<b>\$\$ORGANIZATION\$\$</b>	All organizations. A Citizen Access term.
<b>\$\$OWNORGANIZATION\$\$</b>	The logged in user's organizations. A Citizen Access term.
<b>\$\$OWNLICENSE\$\$</b>	The logged in user's licenses. A Citizen Access term.
<b>\$\$PUBLICUSER_EMAIL\$\$</b>	The logged in user's email. A Citizen Access term.
<b>\$\$SERV_PROV_CODE\$\$</b>	The login user's agency code
<b>\$\$TODAY+/-#\$\$</b>	<p>Today's date (the workstation system date), or a range of days. For example: Enter</p> <p style="text-align: center;">\$\$TODAY-7\$\$</p> <p>as the value for the Inspection Date field to return all records with inspection dates in the past week. Similarly, enter</p> <p style="text-align: center;">\$\$TODAY+7\$\$</p> <p>to return records with inspection dates occurring in the week to come.</p>
<b>\$\$TODAY+n\$\$</b>	Date range beginning with today's date.
<b>\$\$USERID\$\$</b>	The ID of the user currently logged on.

Variable	Description
<b>\$\$USERFULLNAME\$\$</b>	The logged in user's full name.

## Relational Operators

Relational operators define the relationship between the field you select and the value you want to compare that field against. For example, if you choose the City field and enter Portland as a value, you can then pick which relational operator you want to define what data to find. If you want records for Portland, you can use =. If you want all records except for Portland, you can use !=. The table below lists the default relational operators available for use.

**Table 8: Default Relational Operators**

<b>=</b>	Equal to
<b>!=</b>	Not equal to
<b>&lt;</b>	Less than
<b>&lt;=</b>	Less than or equal to
<b>&gt;</b>	Greater than
<b>&gt;=</b>	Greater than or equal to
<b>LIKE</b>	Contains part of the field value.
<b>IS NULL</b>	Use to identify field values that are empty (no field value entered).
<b>IS NOT NULL</b>	Use to identify field values that are not empty (field value entered).
<b>CONTAINS</b>	Contains all of the field value.

## Viewing Information Across Agencies

A multi-agency environment provides users the ability to view information across agencies in the following Civic Platform features:

- [Task dashboard](#)
- [Related records](#)
- [Record search](#)
- [Inspection search](#)
- [Navigation aids](#)

### Cross-agency task dashboard

The task dashboard supports multi-agency environments, enabling super agency users to view tasks that originate from the various child agencies they work with, all in one place on the Civic Platform dashboard. Users can toggle between the agency tabs at the top of the page to view the tasks assigned to them from different agencies. The agency tabs display the number of tasks assigned to the currently logged in user, enabling users to easily identify and navigate to the agencies where they have tasks to perform. This feature requires no configuration.

Council Chambers	
Council	Accela Administrator

Council Chambers	
Council	Accela Administrator

Commission Room	
Planning Commission	Accela Administrator

### Cross-agency related records

Civic Platform enables users to view related records across multiple agencies, in both list view and tree view.

**Related records list view:**

Record ID: 16CAP-00000062 - CLOUD01

Menu | Tree View | Clone Sgl | Clone Mult | Update Related

Showing 1-4 of 4

Agency	Record #	Record Type	Application Name
<input type="checkbox"/> OKC	15CAP-00000008		
<input type="checkbox"/> CLOUD01	16CAP-00000062	CaseManagement/Amy/SA-Cloud01/NoComponent	
<input type="checkbox"/> OKC	15CAP-00000-00011		OKC Record
<input type="checkbox"/> PETALUMA	16CAP-00000047		

Page 1 of 1

### Related records tree view:

Record ID: 16CAP-00000062 - CLOUD01

Menu | List View | Clone Sgl | Clone Mult | Update Related Records


- OKC:15CAP-00000008; [Licenses.OKC.ACA.Service] ::::
- CLOUD01:16CAP-00000062; [CaseManagement,Amy,SA-Cloud01,NoComponent] ;Received;;;
- CLOUD01:16CAP-00000062; [CaseManagement,Amy,SA-Cloud01,NoComponent] ;Received;;;
- OKC:15CAP-00000-00011; [Permits,Amy,SA-OKC,NoComponent] ;:OKC Record::
- PETALUMA:16CAP-00000047; [Building,Grace,EMSE,TestEMSE] :::: 1 1, 1 PETALUMA:

### Cross-agency record search

Civic Platform provides the ability to search for records across multiple agencies. Users can also search for specific record types and record status types across agencies.

**Note:** User access to records from other agencies depends on delegate user settings for the agency where the record was created. If users receive error messages when attempting to open cross-agency records, ensure that the proper delegate user settings are configured as described in “Delegate User Management” in the Civic Platform Administrator Guide.

#### To search for records across multiple agencies:

1. Click  to access the launchpad.
2. Navigate to the Records page (In the Filter list... field, enter **Record**).
3. On the Records page, click **Search**. The Records Search page displays.




4. Add the Agency field, Record Type field and/or the Status Type field to your records search page.
  - a. Click **Menu > Edit View**.
  - b. For complete instructions on the Edit View feature, click **Help > Working with Forms > Using the Edit View Feature**. You can also refer to the Civic Platform Administrator Guide for full details.
5. Select the agency you want to search within. You can select multiple agencies by pressing the Ctrl key while making your selections. If you do not make a selection, Civic Platform searches across all agencies in your multi-agency environment.
6. Select the record type you want to search within. The record type drop-down will display all record types for all agencies a delegate user has access to.
7. Select the status type you want to search for.

The screenshot shows the 'Record' search form in the Civic Platform. The top navigation bar includes 'CLOUD01 | Civic Platform' and 'Accele'. The form contains several fields:
 

- Agency:** A multi-select dropdown menu with options: PETALUMA, OKC, CLOUD01, and FLAGSTAFF. This field is highlighted with a red box.
- Status Type:** A single-select dropdown menu with options: APPROVED, CLOSED, COMPLETE, DENIED, INCOMPLETE, OPEN, PENDING, UNASSIGNED, and VOID. This field is also highlighted with a red box.
- Reservation Type:** A dropdown menu with options: Group and Type, both set to '--Select--'.
- Reserved On:** Date range fields for 'From' and 'To', with 'To' set to 12/15/2015.
- Ends On:** Date range fields for 'From' and 'To'.
- Customer Type:** A dropdown menu set to '--Select--'.
- First Name** and **Last Name:** Text input fields.

 The 'Menu' button is visible at the top left of the form area.

8. Enter any additional search criteria and click **Submit**. Civic Platform returns a list of records for the selected agencies and status types.
 

 **Note:** Cross-agency searches are only supported for record and inspection searches. However when FID 8403-Multi Agency Switch is enabled, cross-agency search fields (Agency and Status Type) may display in search forms where cross agency searches are not supported, and will only return results from a single agency (the agency you are currently logged in to).

**BPTDEV | Civic Platform**

Record

Menu ▾ Refine Search New Create By Form Create From Model

Showing 1-10 of 14

<input type="checkbox"/> Record #	Agency	Status	Record Type
<input type="checkbox"/> BUS-000056	BPTDEV	Active	General Business License
<input type="checkbox"/> BUS-000055	BPTDEV	Active	General Business License
<input type="checkbox"/> 15CAP-00000172	BPTDEV	Active	iris renew test
<input type="checkbox"/> 15CAP-00000181	PETALUMA	Active	iris test ACA
<input type="checkbox"/> BUS-000052	PETALUMA	Active	General Business License
<input type="checkbox"/> BUS-000053	PETALUMA	Active	General Business License

The records search page now includes an Agency column, so that you can sort records by agency. The Agency column only displays in multi-agency environments (FID 8403-Multi Agency Switch is enabled).

### Cross-agency inspection search

Civic Platform enables users to search for inspections across multiple agencies. You'll need to add the Agency field to your Inspections Search page to enable this functionality, as described in [Cross-agency Record Search](#). The Agency column allows you to sort inspections by agency. You can select multiple agencies in the Agency search field by pressing the Ctrl key while making your selections – or leave the Agency field blank to search across all agencies. The Agency field is only available in multi-agency environments; it is not available in single-agency environments.

### Navigation aids

- To aid in navigating and orientation, the agency ID now displays on all pages within Civic Platform in multi-agency environments.
- When you open the records page, Civic Platform creates a new space for it in the sidebar. To navigate back to the records list after opening a record, simply click the Records space. Civic Platform remembers your place in the list and returns you to the page you last visited in the records list.

CLOUD01 | Civic Platform Acela Administrator

Record ID: 15CAP-00000028

Summary

**Record**

Activities (0)

Activity Summary (1)

Address (0)

Addtl Info

Application

Calendar

Classic Reports

Menu Save Reset Time Accounting

Record #	Opened Date	Status
15CAP-00000028	12/14/2015	

Application Name

Description

check spelling

Total Invoiced	Total Paid	Balance
0.00	0.00	0.00

Completed Date Completed by Department Current Department

*To navigate back to the records list from a record*

## The V360 User Interface

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Choose a topic from the list to learn more about the V360 user interface.

### **Related Information**

[User Interface Overview](#)

[Preparing Web Browsers for Civic Platform](#)

[Setting Your Home Page](#)

[Customizing Record Detail Menus](#)

[Creating New Items](#)

[Using Civic Platform GIS](#)

[Viewing Record Details](#)

[Working with List Portlets](#)

[Working with Form Portlets](#)

## User Interface Overview

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Civic Platform provides a common interface called a console for users across your agency. The console comprises the entire working space, including the agency bar, toolbar, and customizable portlets. However, having a common interface does not mean that you cannot customize it to reflect your role within your agency. You can define your home page by adding portlets and positioning them where you choose, you can create custom menus, and more.

The following sections provide general information about the console, how to prepare your browser for the console, how to define your home page, how to create custom menus, and how to use your buttons and portlets.

You can also find information about using the console editor to create a user interface that reflects your role within your agency. For more information about working with the console editor, see your agency administrator.

## Preparing Web Browsers for Civic Platform

---

Civic Platform is supported on multiple web browsers. It is important to prepare your web browser properly so that you can view any Civic Platform pop-up windows while limiting external pop-up windows, and avoid unnecessary error messages.

For information about preparing your browser, see the *Civic Platform Installation Guide*, available via the [Documentation Library on Community](#) and on the FTP site.

## Setting Your Home Page

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A home page is the first page you view after logging into Civic Platform or the page that displays after clicking the Home button on the console Toolbar. To customize your home page, you must create a main link and add the portlets you want associated with it. Then, verify the main link you want for the home page is in the first position. If you do not have access to create main links on your console, contact your agency administrator.

## Customizing Record Detail Menus

---

The record detail tabs by default include every built-in tab items that Civic Platform provides. However, your agency administrator may have defined custom tab menu. Then you only view the tab items related with your tasks in the detail tabs.

Civic Platform provides easy access to tab items with the Go To drop-down menu in record detail portlets.

### To access tab items from the Go To menu

1. Navigate to the form portlet you want to work in, such as the Building portlet.  
Civic Platform displays the portlet.
2. Click a record link in the Building portlet  
Civic Platform displays the detail portlet for the selected record.
3. Hover your mouse cursor on the **Go To** button, and select the tab item you want from the drop-down list.
  - If the detail tabs already include the tab item, the tab item becomes the current tab in the detail tabs.
  - If the detail tabs do not include the tab item, the tab item appears to the right of the detail tabs and becomes the current tab.



## Creating New Items

---

You can create new items from the Civic Platform Toolbar. This allows you to launch common tasks, such as creating a new building record or starting a cashier session, from your Home page.

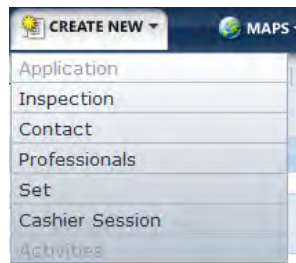
### To create a new item

1. Navigate to your Home page.

Civic Platform displays your personalized Home page.

2. Click **Create New**.

Civic Platform displays a drop-down menu of objects configured for display.



3. Click the object that corresponds to the tasks you want to complete.

Civic Platform displays the associated portlet or application form selected. For example, if you create a new building record, then the Record Type Select page displays.

## Using Maps

With the V360 user interface, Accela Silverlight GIS provides a geographic view of all land-use, zoning, and infrastructure information associated with agency records, including parcels, permits, inspections, plans, assets, work orders, and service requests.

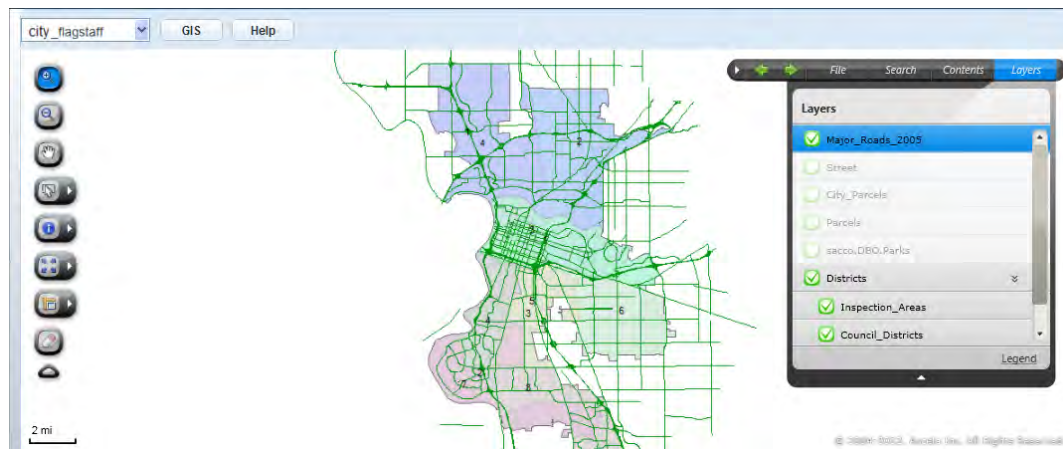
You can access GIS directly from the V360 toolbar, and visually review, research, and manage agency records.

### To use GIS

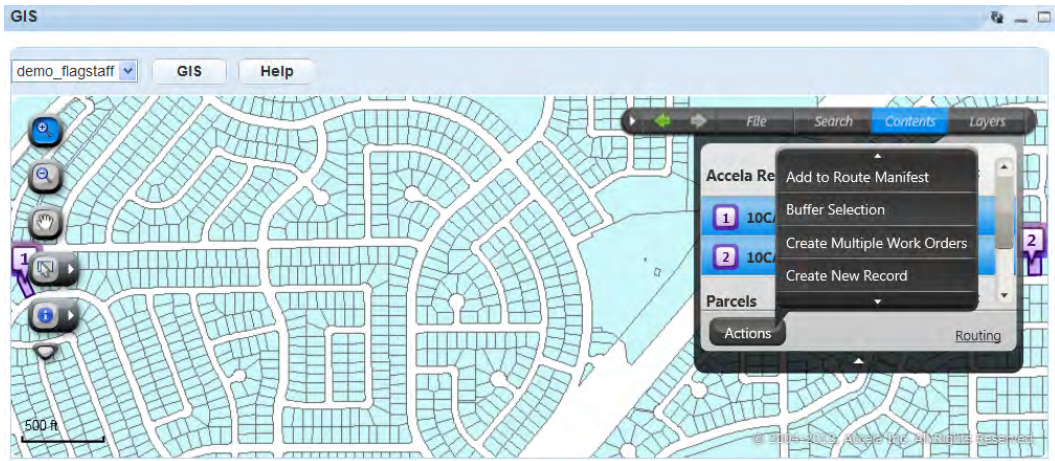
1. Log in to Civic Platform.  
Civic Platform displays your personalized Home page.
2. Click the **Maps** button.  
Accela Silverlight GIS displays the map viewer.



3. Use the map viewer table of contents to configure the map service and map layers that display.  
Accela Silverlight GIS displays the selected map service and map layers.



4. Access the Context and Actions menu to complete tasks. The Context menu is accessible from map tips. The Actions menu is accessible from the menu bar.  
Accela Silverlight GIS displays the corresponding map commands.



## Viewing Record Details

When you open a record, you can view record details using the associated tabs. These tabs highlight specific information related your agency's records, such as conditions, fee payments, workflow task status, and inspections.

1. Navigate to your Home page.  
Civic Platform displays your personalized Home page.
2. Navigate to the portlet that you want to work in.  
Civic Platform displays the portlet.
3. Locate the record you want to work with and click the link to display record details.  
Civic Platform displays the record tabs in the Record detail portlet.

The screenshot shows the 'Building Permits' application interface. At the top, there is a menu bar with options like 'Menu', 'Search', 'New', 'Create By Form', 'Create From Model', 'Delete', 'GIS', 'Create a Set', 'View Log', 'Reports', and 'Help'. Below this is a table of records. The second record is selected, showing details for '13ELE-00000-00003'. Below the table, there is a 'Record ID: 13ELE-00000-00003' section with a 'Go To' menu and a 'Help' button. The 'Go To' menu is open, showing tabs for 'Record', 'Summary', 'Contacts (1)', 'Inspections (1)', 'Conditions (0)', 'Conditions of Approval (0)', 'Application History (1)', and 'Workflow'. The 'Record' tab is selected, displaying application details such as 'Application Status: Accepted', 'Application Detail: Detail', 'Application Type: Building/Electrical Permit/Commercial/All Categories', 'Address: FLAGSTAFF, AZ', 'Owner Name:', and 'Owner Address:'.

Alternate ID	Record Type	Active Task	Opened Date	Created By	Status	Status Date	Description	Reported Date
<input type="checkbox"/> ORE13TMP-000013	Building/Building Permit/New Building/NA		01/14/2013	PUBLICUSER853		01/14/2013		01/14/2013
<input checked="" type="checkbox"/> 13ELE-00000-00003	Building/Electrical Permit/Commercial/All Categories	Application Acceptance	01/15/2013	John Q Smith	Accepted	01/15/2013		01/15/2013

Record ID: 13ELE-00000-00003

Go To: Record | Summary | Contacts (1) | Inspections (1) | Conditions (0) | Conditions of Approval (0) | Application History (1) | Workflow | Workflow

Application Status: [Accepted](#)  
 Application Detail: [Detail](#)  
 Application Type: [Building/Electrical Permit/Commercial/All Categories](#)  
 Address: [FLAGSTAFF, AZ](#)  
 Owner Name:  
 Owner Address:

4. Use the Go To menu or the scroll bar to find the tab you want to view.
5. Click the tab name.  
Civic Platform displays the details for the selected tab.

## Working with List Portlets

A list portlet displays a list of items entered into Civic Platform. A list portlet may include work orders, assets, permit, applications, service requests, addresses, or contacts. A list may also be the result of a search. Civic Platform provides users with ways to manage lists, such as sorting, filtering, organizing, and exporting.

### Topics

- [Viewing Lists](#)
- [Managing the Display](#)
- [Exporting Data to CSV](#)

### Viewing Lists

Portlet lists may have many items that populate the list view. Click any column title to sort the list. Use the portlet navigation controls to advance through the list to view additional or previous items. You can adjust the number of records displayed in a list by choosing Expand List or Contract List from the Menu button. To view examples of the icons and hyperlinks associated with contracting, expanding, navigating, and sorting lists, see the image below. Contact your agency administrator to redesign the layout of a list portlet.

Account ID	Balance	Description	Overdraft	Overdraft Limit	Status	Ledger Account	Threshold Amount
<a href="#">BLD2012-0001</a>	\$24,994.75		Yes	\$1,000.00	Active		
<a href="#">BLD2012-0002</a>	\$52,500.00	Ace Builders	No	\$0.00	Active		\$6,000.00
<a href="#">BLD2012-0003</a>	\$900.00	Chandler Genera...	No	\$0.00	Active		\$1,000.00
<a href="#">TEST ACCOUNT</a>	\$9,945,180.00		Yes	\$100,000.00	Active		

**Figure 3: List Portlet**

- A** Use the Menu button to access a menu of general tasks related to the records in the selected portlet.
- B** Use the navigation controls to access other pages in a list.
- C** Click any column title to sort a list.

### Managing the Display

Users can customize how information displays in a list. You can specify the field display, including the field sequence and the field width. Organize and sort lists by assigning a display or a sort order in numeric sequence.

### Topics

- [Customizing Content](#)
- [Editing Your View](#)

## Customizing Content

Use the **Customize Content** feature to define how you want a portlet list to display. First, choose the fields you want to display on the portlet and then customize the fields. You can do this by adding a label for the field, specifying the field width, and indicating the display order. You can also specify how many items to display for an expanded and a contracted list.

### To customize the content of your list

1. Locate the list portlet that you want to customize.
2. Click the **Menu** button.
3. Choose **Customize Content** from the drop-down list.

Civic Platform displays a list of all available and currently chosen fields.

Element	Width (pixels)	Display Order	Label
Alternate ID	150	1	
Record Type	200	2	
Active Task	200	3	
Opened Date	80	4	

4. Show or hide fields for portlet display. Fields in the **Selected Fields** list box display in the portlet view. Fields in the **Available Fields** list box do not display in the portlet view.
  - a. Click a field name to highlight it. Press the **CTRL** key to choose multiple fields at a time.
  - b. Use the arrow keys to move the fields between the **Available Fields** or **Selected Fields** boxes. Double arrow keys move all fields, whether selected or not, to the destination box.
5. Arrange the sequence of the fields in the **Selected Fields** box.
  - a. Click a field name.
  - b. Use the up and down arrow buttons to move the field.
6. Complete the remaining fields as necessary.
 

<b>Contract</b>	The number of items to display on a page when you contract the list.
<b>Display Order</b>	Where the field displays in the field order (from left to right).
<b>Element</b>	A list of fields in the Selected Fields box in their current order.
<b>Expand</b>	The number of items to display on a page you expand.
<b>Label</b>	Label for a field. Agencies can customize this value as needed.
<b>Width (pixels)</b>	The column width in pixels.
7. Click **Submit**.

## Editing Your View

The Edit View feature allows you to create a portlet list display to your specifications and name it as a filter. First, choose which fields you want to show. Then, apply the customization to those fields. You can add a label for the field, specify its width, apply a mask, define sort order, and define display order. You can also specify how many items to display for an expanded and a contracted list.

### To edit the view of a portlet list

1. Navigate to the list portlet that you want to customize and hover the mouse cursor over the **Menu** button.

Civic Platform displays a command menu.

2. Choose **Edit View** from the drop-down list.

Civic Platform displays a list of available and currently selected fields.

Element	Display Order	Width (pixels)	Required	Label	Mask	Sort Order		
						1st	2nd	3rd
Record ID	1	100	No			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Record Type	2	200	No			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Active Task	3	200	No			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Show or hide fields to display in the selected portlet. Fields in the Selected Fields box display in the portlet view. Fields in the Available Fields box do not display in the portlet view.

- a. Click a field name to highlight it. Press the CTRL key to choose multiple fields at a time.
- b. Use the arrow keys to move the fields between the Available Fields or Selected Fields boxes. Double arrow keys move all fields, whether selected or not, to the destination box.

4. Arrange the sequence of the fields in the Selected Fields box.

- a. Click a field name.
- b. Click the up or down arrow to change its position.

5. Complete the remaining fields as necessary. For a list of field descriptions, see [Edit View Field Descriptions](#).

6. Click Submit.

Table 9: Edit View Field Descriptions

<b>A &gt; Z Ascending</b>	Use to sort field data alphabetically from A to Z.
<b>Contract</b>	The number of items to display on a page when you contract the list.
<b>Description</b>	The description for the filter you are creating.

<b>Effect Scope</b>	The availability of the customized sort/filter using the drop-down feature for Module, Group, and User.
<b>Element</b>	Civic Platform lists the fields in the Selected Fields box in their current order.
<b>Expand</b>	The number of items to display on a page when you expand the list.
<b>Filter Name</b>	A descriptive name for the filter.
<b>Label</b>	A customized label for the field.
<b>Mask</b>	A mask to limit the type of data a field accepts. A mask might include symbols for currency, phone number, SSN, or zip code.
<b>Record Selection</b>	The type of record selection tool you want to choose for the list. Choices include <b>Radio Button</b> or <b>Check Box</b> .
<b>Sort Order</b>	Indicates the sort priority of an item. Defining sort order is useful for organizing as well as grouping list items.
<b>Source View Name</b>	The name of the form that you are modifying.
<b>Width (pixels)</b>	The number of pixels for the column width.
<b>Z &gt; A Descending</b>	Use to sort field values alphabetically from Z to A.

## Exporting Data to CSV

Civic Platform provides a CSV Export option in the menu of every list portlet or list tab. Use this option to export the list of records you see into a CSV (comma delimiter) file. A CSV file stores tabular data that you can view in other applications, such as Microsoft Excel.

Civic Platform also provides a **CSV Export** button beside an application-specific information (ASI) table, on the precondition that the ASI table has some data in the database. Users can click the button to export all the data stored in the database for the ASI table, not only the data on display, into a CSV file.

### To export a list

1. Go to the desired list portlet.
2. Click the **Menu** button and choose **CSV Export** from the drop-down list.  
If you want to export ASI table data, go to the ASI table you want to export and click **CSV Export**.  
Civic Platform displays a file handling dialog box that prompts you to choose how you want to handle the CSV file you are creating.
3. Do one of the following:
  - To open the CSV file immediately after exporting the list, click **Open**.  
You can save the file after opening it. Your operating system preferences determine which software application, such as a text editor or a spreadsheet program, opens this file by default.
  - To save the CSV file without opening it first, click **Save**. Specify the location where you want to save it.



## Working with Form Portlets

This portlet displays a form with fields that provide details about a single object such as a permit, service request, or address. Some fields contain editable information. Fields may require users to enter only numbers or only dates. A field may also require users to choose an option from a drop-down list. Use the form portlet to search for existing records in your system or to create new records. The image below is an example of form portlet structure.



### Note:

Drop-down list options which are no longer available when creating new records, continue to appear as valid selections for fields in the following sections of the records where they appear:

Address, Parcel and Owner (APO) Template

Application-Specific Information (ASI), Task-Specific Info (TSI), and People Template pages

ASI, People, Asset Attribute, and Asset Condition Assessment Attribute tables

This availability enables agencies to maintain historical continuity when working with older records or modifying historical data.

The screenshot shows a form portlet for 'Inspections'. At the top, there is a title bar labeled 'A' with an arrow pointing to 'Inspections'. Below the title bar is a toolbar labeled 'B' with buttons for 'Menu', 'Save', 'Update', 'Reset', 'Select Record To Copy From', 'View Log', 'Help', 'Data Language', and 'English'. Below the toolbar is a tab bar labeled 'C' with tabs for 'Go To', 'Inspection Detail', 'Guide Sheet', 'Conditions (0)', 'Conditions of Approval (0)', 'Documents (0)', and 'Related Insp'. The main form area contains several fields: 'Scheduled Date' (10/12/2012), 'Inspection Type' (011-Plan Check), 'Display in ACA' (checked), 'Estimated Start Time', 'Estimated End Time', 'Inspection Date' (01/17/2013), 'Record ID' (10BLD-00000-00008), 'Record Type' (Building/Building Permit/New Building/NA), 'Inspection Contact Name', 'Inspection Contact Phone Number', and 'Inspection Grade' (a drop-down menu with '--Select--'). Labels 'D' and 'E' with arrows point to the 'Inspection Date' and 'Inspection Grade' fields, respectively.

**Figure 4: Form Portlet**

- A Portlet title.** Indicates the current portlet and displays the record number you are working with.
- B Toolbar.** Use the action buttons to perform tasks. Common toolbar buttons include New, Search, Edit, Refresh, Delete, Print, and Help.
- C Tab scroll buttons.** Click the Go To button or the arrow buttons at either end of the record detail tabs to display additional portlet tabs
- D Date picker.** Click the calendar icon to choose a date from a pop-up calendar when completing date fields.
- E Down arrow button.** Click the down arrow to view a drop-down list.

## Getting to Know the New User Interface

---

Welcome to the Accela Civic Platform, and welcome to a new user interface designed to provide you with an intuitive, pleasant user experience, even as it helps you get your job done more effectively and efficiently.

Choose from the following list of topics to learn more about the new interface, and how you can leverage its features and functionality to make your work sessions more productive.

### Introducing Civic Platform 8.0

- [Taking a Tour of the New Interface](#)
- [Figuring Out How to Do Your Job When Everything is Different](#)

### Getting In, Getting Out, and Getting Around

- [Logging In and Logging Out](#)
- [Changing Your Password](#)
- [Switching Between the New Interface and the Previous One](#)
- [Accessing Civic Platform Administration from the New UI](#)

### Navigating the New User Interface

- [Switching Between Dashboards](#)
- [Using Search in the New Civic Platform User Interface](#)
- [Using the Launchpad](#)
- [Working with Spaces](#)
- [Interacting with the Task Dashboard](#)
- [Interacting with the Map Dashboard](#)

## Introducing Civic Platform 8.0

---

The new Civic Platform 8.0 interface is a new experience. Once you get to know the tools you have available to you, you will quickly discover how useful they can be in helping you do your job.

### Topics

- [Taking a Tour of the New Interface](#)
- [Figuring Out How to Do Your Job When Everything is Different](#)

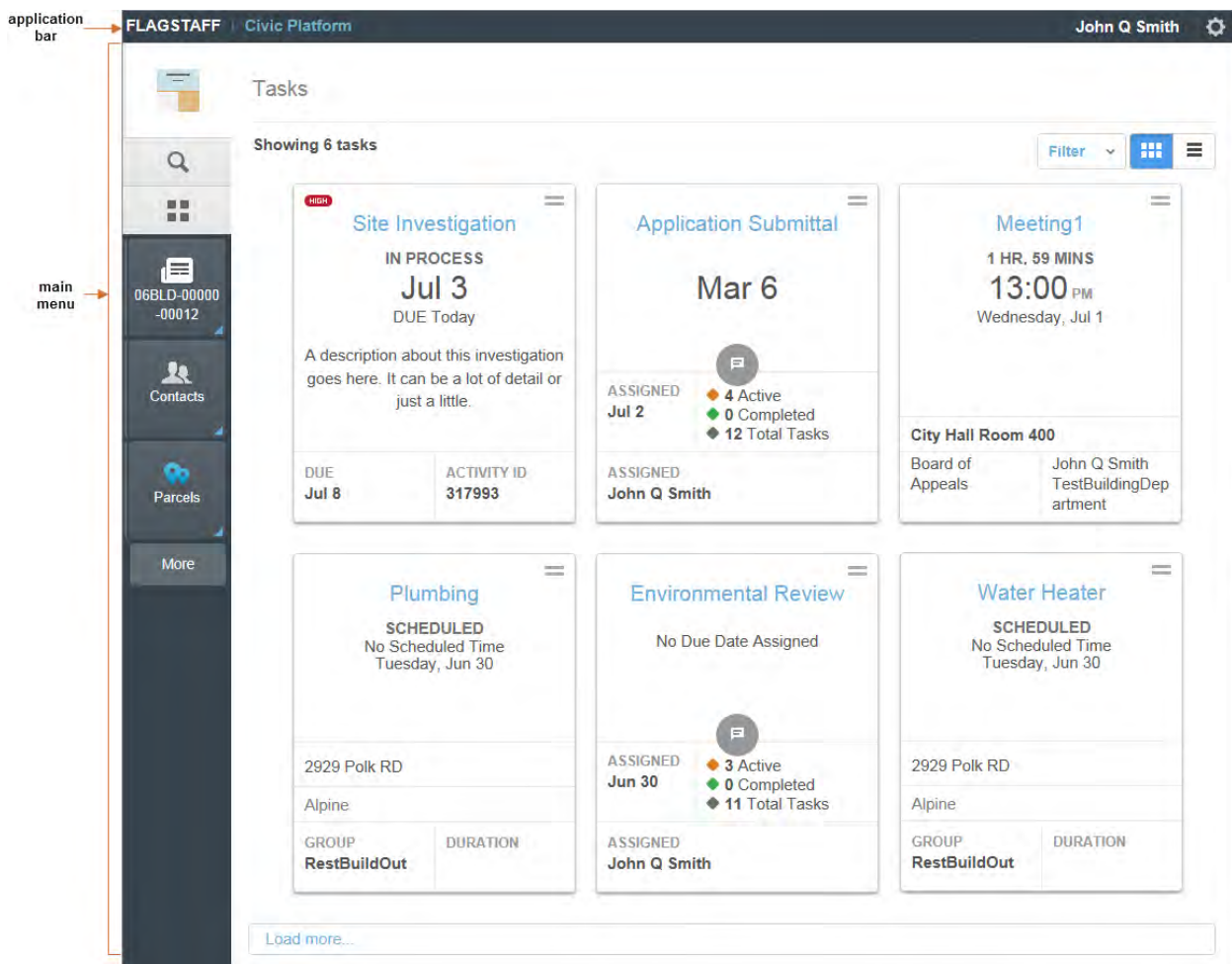
### Taking a Tour of the New Interface

Although the new Civic Platform user interface is designed to be intuitive and easy to use, it is helpful to take a moment to acclimate yourself to the environment and the tools available to you.

- [Getting to Know The Home Page](#)
- [Getting to Know the Tasks Dashboard](#)
- [Getting to Know the Maps Dashboard](#)
- [Getting to Know the Application Bar](#)
- [Getting to Know the Main Menu](#)
- [Getting to Know the Launchpad](#)
- [Getting to Know Spaces](#)
- [General Navigation Tips](#)

### Getting to Know The Home Page

The home page is the starting point for anything you want to do in the new interface.



**Figure 5: HOME PAGE**

**Getting there** Log in. The home page always displays first.  
Click your agency's name in the upper left-hand corner of the window to return to your home page.

#### Features of the home page:

- The tasks dashboard is essentially your day's to-do list (see [Getting to Know the Tasks Dashboard](#)).
- The application bar helps you get to where you need to be (see [Getting to Know the Application Bar](#)).
- The main menu provides you with the tools to access and organize your work spaces, as well as to find what you need (see [Getting to Know the Main Menu](#)).
- Access to the launchpad (see [Getting to Know the Launchpad](#)).
- Access to global search (see [Performing a Global Search](#)).

#### Related Links

- [Switching Between Dashboards](#)
- [Using Search in the New Civic Platform User Interface](#)
- [Using the Launchpad](#)

- [Working with Spaces](#)

## Getting to Know the Tasks Dashboard

The tasks dashboard has 2 display options: [Card View](#) and [List View](#). Both views list tasks assigned to you. You can toggle between the two views whenever you want.

### Card View

Tasks

Showing 6 tasks

task cards

dashboard display options

Filter

Site Investigation

IN PROCESS

Jul 3

DUE Today

A description about this investigation goes here. It can be a lot of detail or just a little.

DUE Jul 8

ACTIVITY ID 317993

Application Submittal

Mar 6

ASSIGNED Jul 2

4 Active

0 Completed

12 Total Tasks

ASSIGNED John Q Smith

Meeting1

1 HR, 59 MINS

13:00 PM

Wednesday, Jul 1

City Hall Room 400

Board of Appeals

John Q Smith

TestBuildingDepartment

Plumbing

SCHEDULED

No Scheduled Time

Tuesday, Jun 30

2929 Polk RD

Alpine

GROUP RestBuildOut

DURATION

Environmental Review

No Due Date Assigned

ASSIGNED Jun 30

3 Active

0 Completed

11 Total Tasks

ASSIGNED John Q Smith

Water Heater

SCHEDULED

No Scheduled Time

Tuesday, Jun 30

2929 Polk RD

Alpine

GROUP RestBuildOut

DURATION

View additional tasks

Load more...

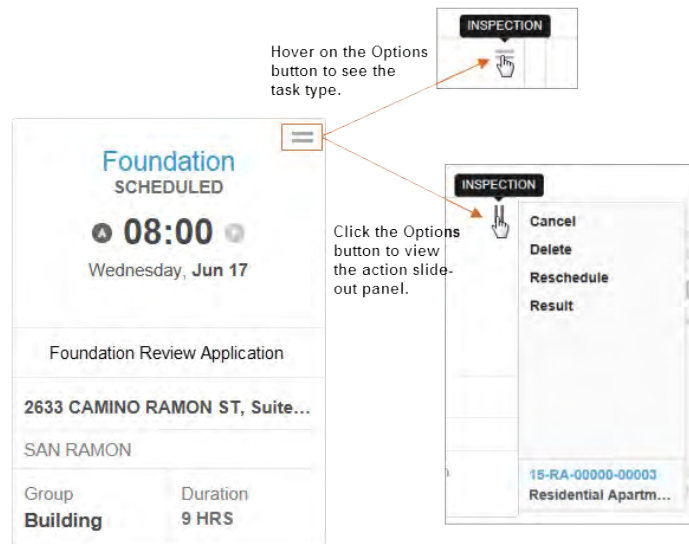
#### Features of the task dashboard card view:

- Each task card is a separate task assigned to you. Six cards display by default when the page first loads. See [Task Card Example](#) to learn more about task cards.
- The **Filter** control gives you some input into which tasks display.
- A dashboard display options toggle lets you switch to a list view.
- The **Load More** link allows you to view more of your tasks in increments of six.

#### Related Links

- [Interacting with the Task Dashboard](#)

## Task Card Example



### Features of the task cards:

- Task card titles tell you at a glance what the task is.
- Click titles in blue text to open the task details in a new space. Black text titles (non-hyperlink) are a visual cue that you do not have permission to act on a task.
- You can hover on the options button to identify the task type.
- Every task card has a slide-out panel that provides you with a list of actions you can perform on the task. Slide-out panels may also provide hyperlink access relevant records, such as a permit record or a primary contact.
- Key information for tasks displays on the card, including important data such as due date, schedule time, comments, and more.
- Icons indicating holds, conditions, notes, and locks, display prominently on task cards as bright colored icons that you can click to get more information.
- If the record includes an application name (also known as project name), an application name assigned to the record shows on the card.

### Related Links

- [Things You Can Do on a Task Card](#)
- [Details You Can Glean from a Task Card](#)
- [Getting More Information About Conditions, Holds, Notices, and Locks](#)
- [Looking at Task Card Examples](#)

## List View

Tasks

Showing 6 tasks

Filter Actions

<input type="checkbox"/>	Task Item	Due Date	Flags	Status	Details
<input type="checkbox"/>	SampleFloorPlan.pdf 12LEL-00001			Assigned May 4	Category: ARCHITECTURAL PLAN
<input type="checkbox"/>	SampleFloorPlan.pdf CAP-00211			Need Correction May 28	Category:
<input type="checkbox"/>	Electrical 15-RA-00000-00003	12:00 AM Jun 30		Scheduled Duration(min): 0	Address: 1259 Oak St, Vacaville, CA
<input type="checkbox"/>	Water Heater 15-RA-00000-00003	Jun 30		Scheduled Duration(min): 30	Address: 1259 Oak St, Vacaville, CA
<input type="checkbox"/>	Plumbing 15-RA-00000-00003	Jun 30		Scheduled Duration(min): 40	Address: 1259 Oak St, Vacaville, CA
<input type="checkbox"/>	Final 15-RA-00000-00001	Jun 24		Pass Duration(min): 1439	Address: .

Load more...

### Features of the task dashboard list view:

- Task items are listed in a table format. Six tasks display by default when the page first loads.
- You can select one or more task items and perform actions on them (see [Using the Task List](#)).
- The **Actions** button gives you access to commands you can apply to one or more task items.
- The **Filter** button gives you some control over which tasks display.
- You can toggle to a task card view using the dashboard display options.
- Use the **Load More** link to view more of your tasks.
- If the record includes the Application Name field (also known as project name), the list view shows the Application Name column.

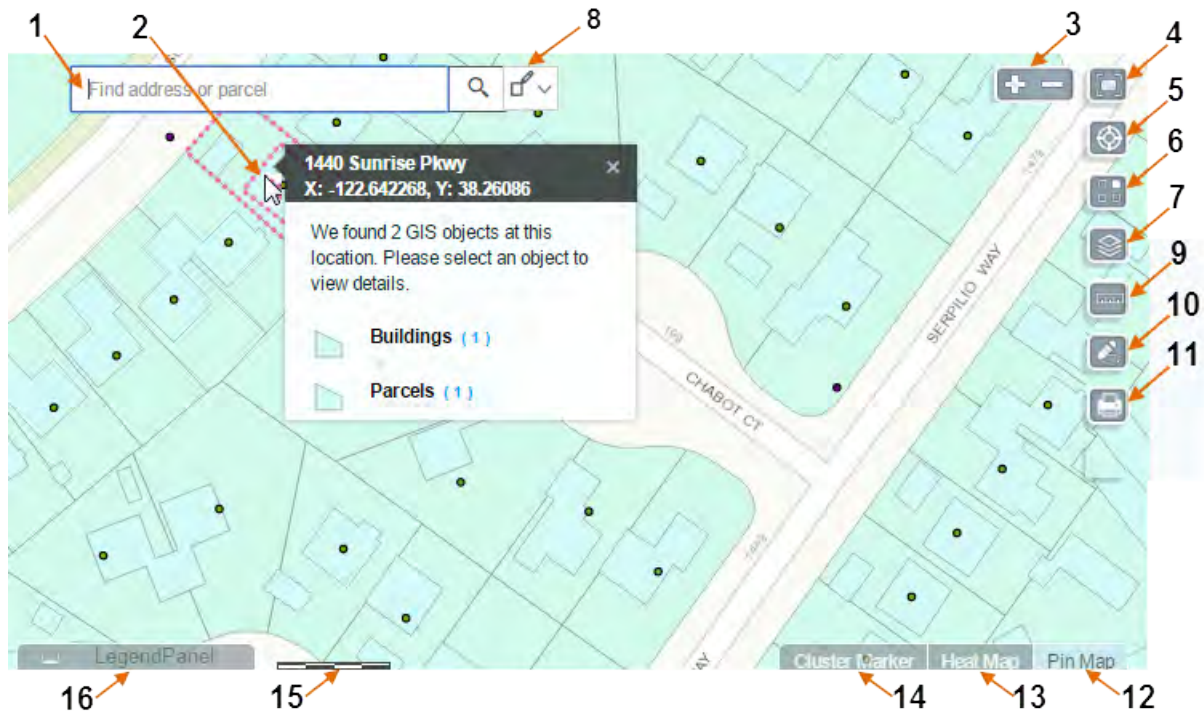
### Related Topics

- [Interacting with the Task Dashboard](#)
- [Using the Task List](#)
- [Getting the Most from Your Task Cards](#)

## Getting to Know the Maps Dashboard

The maps dashboard provides you with another way to identify and analyze land-use, zoning, inspection or service request routes, infrastructure, and other geo-centric information.

It is the next generation version of Accela GIS 7.x Map Viewer.



**Figure 6: Maps Dashboard**

**Features of the maps dashboard:**

- Find an address or place. (1)
- Point and click to see a location's address, coordinates, and associated GIS objects. (2)
- Zoom in or out. (3)
- Reset the map display to the Default extent, which is the initial area shown on the map. (4)
- Bookmark locations and navigate to bookmarked locations. (5)
- Choose a basemap. (6)
- Arrange how your map layers display. (7)
- Multi-select points on the map to form the vertices of a shape and select GIS objects contained within the shape. (8)
- Measure area, distance, or longitude/latitude. (9)
- Annotate your map view with lines and shapes, as well as text. (10)
- Print a map to a PDF or a printer. (11)
- View a pin map, where locations are marked with pins. (12)
- View a heat map, where gradient hotspots are featured. (13)
- View a cluster map, where locations are marked by numbered dots that represent grouped locations. (14)
- View measurement scales and ratios of map vs. actual. (15)



- View the legend to understand map symbols. (16)


## Related Topics

- [Maps in Civic Platform](#)

## Getting to Know the Application Bar



### Features of the task dashboard list view:

- You can click the agency name on the left side to return to your home page.
- You can click  (Settings) to access a menu of actions (such as opening the administration tool or signing out).

## Getting to Know the Main Menu

The main menu is your control pad for adding, finding, and accessing content.




### Features of the main menu:

- **Dashboard toggle** - Switches between a task-centric view and a map-centric view.



- **Global search** - Makes it easy for you to search for just about anything.
- **Launchpad** - Your starting point for accessing pages and records. It is also where you start the process to create a new application.
- **Spaces** - When you select any page from the launchpad, it opens in a new space. That space is anchored on the main menu until you close it.

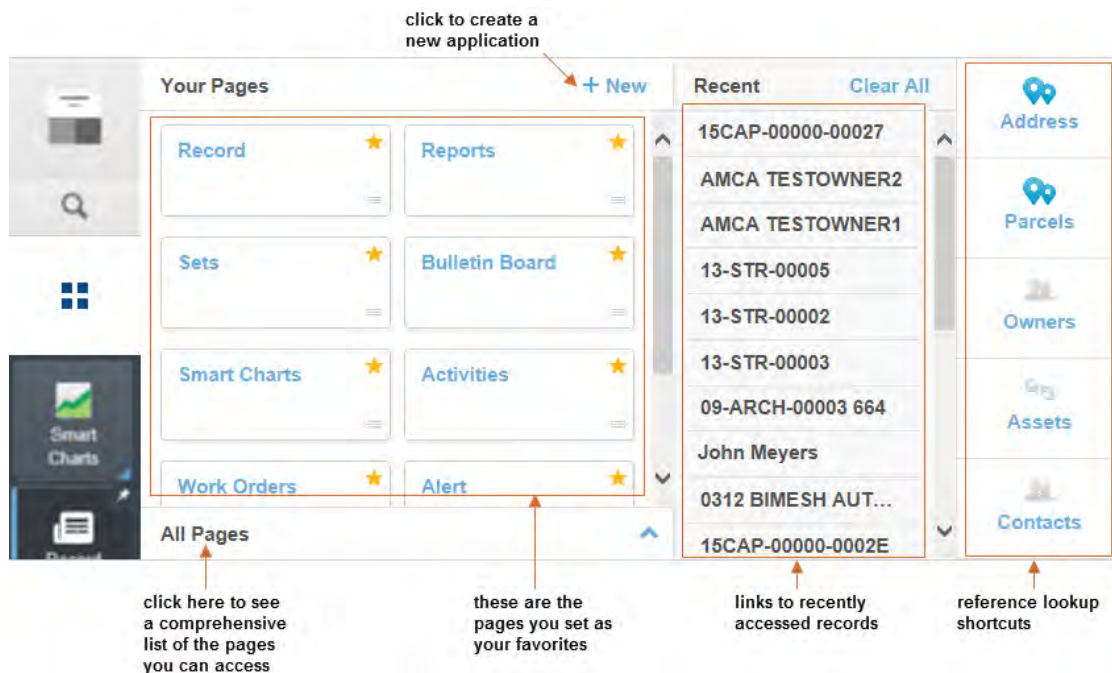
 **Note:** A space on the main menu acts like a browser tab. If you want to work with multiple records or tasks in Civic Platform, use multiple spaces instead of multiple browser tabs. In general, use only one browser tab or session for the Civic Platform UI. Do not use multiple browser tabs or multiple browser sessions to open multiple Civic Platform records and tasks.

**Related Links**

- [Switching Between Dashboards](#)
- [Using Search in the New Civic Platform User Interface](#)
- [Using the Launchpad](#)
- [Working with Spaces](#)

**Getting to Know the Launchpad**

The Launchpad is your access point to just about everything you want to do in Civic Platform. Any link you click within the launchpad opens a new space for where you can interact with the data you selected.



**Getting there**

Click the launchpad toggle on the main menu.

**Features of the launchpad:**

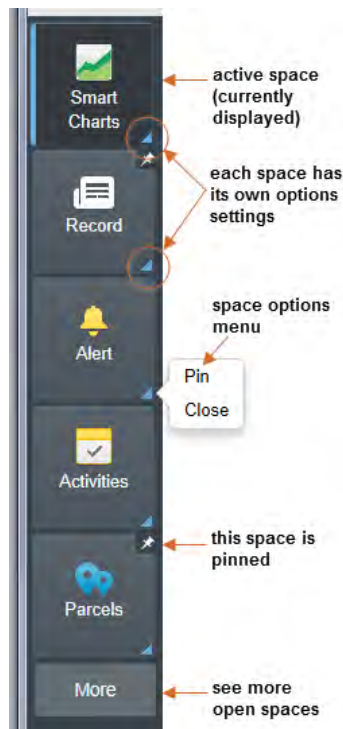
- Click **+New** to create new applications.
- Mark frequently used pages as favorites for quick access.
- Click **All Pages** to see all of the pages available to you. Use the filter to locate a page quickly.
- Use the recent records links to return to a page or record you recently worked on.
- Locate a reference address, parcel, owner, asset, or contact by clicking a reference shortcut, then entering search criteria.

**Related Topics**

- [Using the Launchpad](#)
- [About Your Pages](#)
- [Defining a Page as a Favorite](#)
- [Accessing Recent Records](#)
- [Accessing Reference Pages](#)

**Getting to Know Spaces**

Every time you open a page from the launchpad, you create a new space.

**Features of the spaces menu:**

- You can pin spaces to keep them in your main menu. Every time you log in, your pinned spaces are there.
- The spaces layout enables you to move from page to page quickly. Just click the spaces
- Each space has its own space options menu that you can use to customize your main menu.
- You can have up to 20 spaces open at one time.
- Use the **More** link to view spaces that don't fit on the menu.



### Related Topics

- [Working with Spaces](#)

## General Navigation Tips

### How to Tell What Is a Hyperlink and What Isn't

Not all hyperlinks are readily apparent in the new user interface. When in doubt, use one of these techniques to identify hyperlinks.

- Method 1: Is the text blue? In general, Civic Platform hyperlinks display as blue text. There are some exceptions to this, however, such as the space icon labels, or the hyperlinks contained in the application bar at the top of the display. You may also find graphical icons that are hyperlinks.
- Method 2: When you mouse over an active hyperlink without clicking, an underline appears. This only works if it's text, however.
- Method 3: When you mouse over an object without clicking, the cursor changes from an arrow  to a pointing hand  if it is an active hyperlink. Click while the hand displays to activate the hyperlink.

### Closing Detail Slide-outs

When you click an activity or document task card, the details do not display in a new space. Instead, a slide-out containing details displays. You can exit a slide-out in more than one way.

- Clicking the exit button in the upper right-hand corner of the slide-out closes the display.

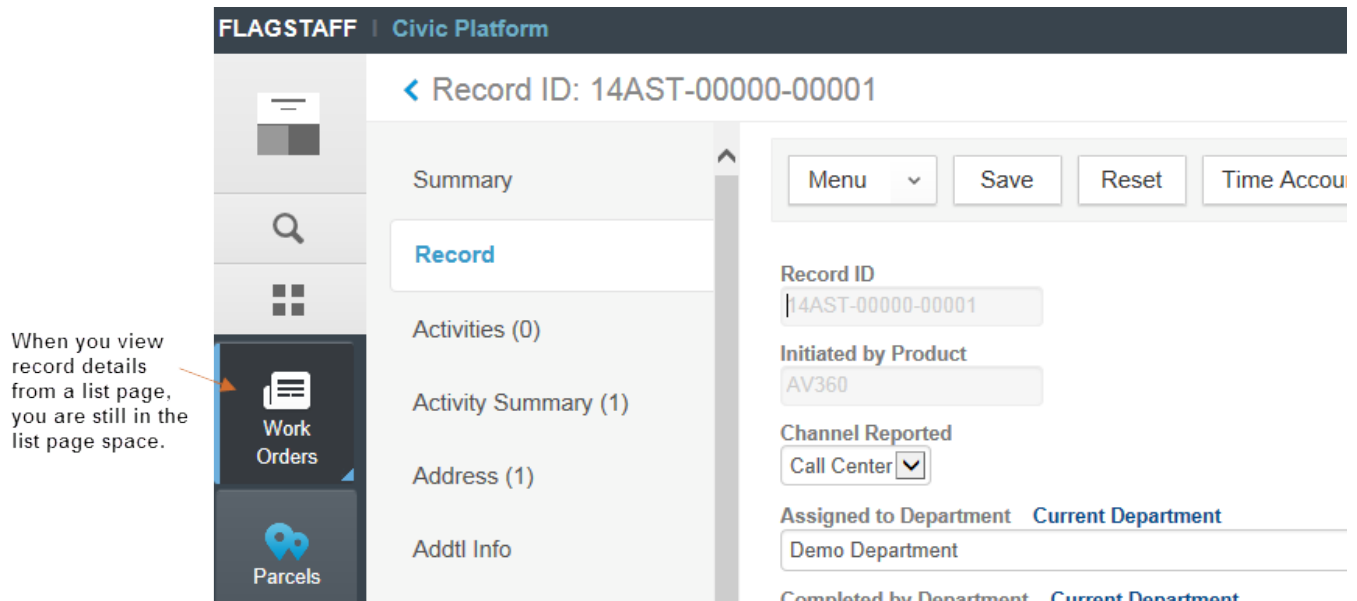


- Clicking another object outside of the slide-out (for example, the agency "home" link) closes the slide-out display, then the new object displays.

## Navigating List Pages

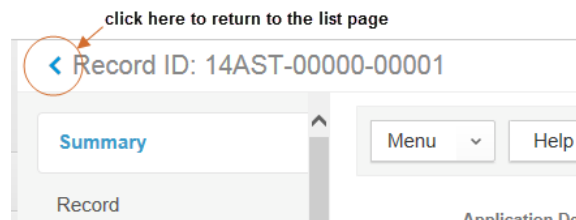
When you open a list page (such as the Work Orders page) in a new space, you see a list of records - in this case, a list of work order records. You can interact normally with rows on the list page by selecting rows and using toolbar buttons, or you can open records by clicking a hyperlink.

However, if you open a record from the list page, it is important to note that the record displays in the same space. It does not open in a new space.

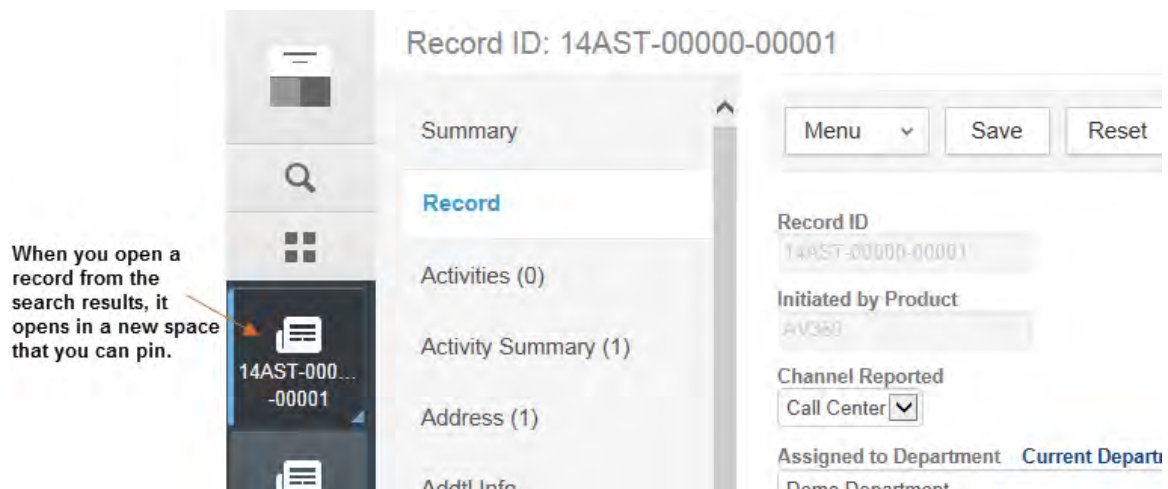


When you view record details from a list page, you are still in the list page space.

To get back to the list page, use the blue arrow in the top left corner of the space.



If you want to open a record in a separate space so you can pin it, try this: Note the record number, then use global search to find and open the record in a new space.



When you open a record from the search results, it opens in a new space that you can pin.

### Navigating Panels on the Maps dashboard

When you select multiple objects on the Maps dashboard, a slide-out panel displays on the right, listing the objects you selected, grouped by type. You can select a type to see a detailed list of objects of that type, and you can select an object to see details about that object.

But what if you want to return to the original list of objects by type? What if you want to close the slide-out panel?

**Look for the blue arrows!**

◀ A left-facing blue arrow in the upper left corner of the panel returns you to a previous view.

▶ A right-facing blue arrow located midway down the panel's left side, closes the panel.



**Note:** If you close a panel, any objects you had selected, are no longer selected.

## Figuring Out How to Do Your Job When Everything is Different

We can all empathize with the frustration of dealing with new things. You had a 'system' - an established process, and now, everything is changed. You just want to get your job done, but the environment is different. You don't know where to start or where to go! You really just want to go back to doing things the old way - the way you know.

But what if the old way wasn't the best way? Just because you have done things a certain way for years does not mean that it was the best way to do those things. Our user experience team did a lot of research in their quest to design a new user interface that would not only make your job easier to do, but make the experience a more pleasant one. We invite you to try it out!

We understand that transition can be frustrating, so to alleviate some of your frustration, we are providing you with a reference table that lists a number of common activities you might perform in a typical work day. For each activity listed, we provide you with helpful tips on how to proceed with those activities in the new user interface.

How do I...	How to do it in the new interface
Find a record	<ul style="list-style-type: none"> <li>• Click the search icon in main menu.</li> <li>• Search and choose record from search results.</li> </ul>
Create a new record	<ul style="list-style-type: none"> <li>• Open launchpad.</li> <li>• Click <b>+New</b>.</li> </ul>
View my tasks	<ul style="list-style-type: none"> <li>• Click your agency name to go to the home page.</li> </ul>
Find a document/contact/just about anything	<ul style="list-style-type: none"> <li>• Click the Search icon in Main Menu.</li> <li>• Search and choose record from search results.</li> </ul>
See a list of <something>	<ul style="list-style-type: none"> <li>• Open launchpad.</li> <li>• Either 1) choose a favorite page from the list of favorites, or 2) click All Pages.</li> <li>• Search for the page you want, then select to display.</li> </ul>
Open <portlet name>	<ul style="list-style-type: none"> <li>• Open launchpad.</li> <li>• Either 1) choose a favorite page from the list of favorites, or 2) click All Pages.</li> <li>• Search for the page you want, then select to display.</li> </ul>

How do I...	How to do it in the new interface
Use ad hoc reports	<ul style="list-style-type: none"><li>• Open launchpad.</li><li>• Click All Pages, then search for Ad Hoc Reports.</li><li>• Select to display.</li></ul>
Where do I change my password?	<ul style="list-style-type: none"><li>• Open launchpad.</li><li>• Click All Pages.</li><li>• Search for Preference Management.</li><li>• Select to open in new space.</li></ul>
How do I open the mapping tool?	<ul style="list-style-type: none"><li>• Click dashboard toggle.</li><li>• Choose Map icon.</li></ul>

## Getting In, Getting Out, and Getting Around

These topics can save you some time if you aren't one to click around until you figure things out.

### Topics

- [Logging In and Logging Out](#)
- [Changing Your Password](#)
- [Switching Between the New Interface and the Previous One](#)
- [Accessing Civic Platform Administration from the New UI](#)

### Logging In and Logging Out

Your agency's name, a valid user name, and a password are all you need to log in to Automation. If you don't have these, see your system administrator. These values are case sensitive, so be sure your Caps Lock key is not engaged.

#### To log in

1. Using the internet browser of your choice, navigate to the login page for the Civic Platform. This URL is provided to you by your agency.



#### Note:

Use the **Add this page to your favorites** link below the Login button to for easier access in future work sessions.


Use the **Remember my information** option to auto-populate everything but your password.

2. Enter your agency name, assigned user name, and password in the designated fields.



3. Click **Login**.


### To Log Out

1. Click  (Settings button) in the upper right-hand corner.
2. Click **Sign Out**.

### Switching Between the New Interface and the Previous One

For many upgrading users, the new interface will take some time to get used to. It is also true that you have a job to do and you may not have all day to experiment with the new interface. Accela has you covered! You can switch from the new interface to the Vantage 360 interface and back again, at least for a while!


#### To switch to the Vantage 360 interface from the new one

1. Click  (Settings button) in the upper right-hand corner.
2. Click **Switch to V360**.

#### To switch to the NEW interface from the old one

1. Locate and click the **Switch to New UI** link in the upper right-hand corner of the display.

### Changing Your Password

1. Click  to access the launchpad.
2. Click the **All Pages** link to access a list of pages.



3. In the **Filter list...** box, type **Preference**.  
Your list of pages is filtered to include the Preference Management page link.
4. Click **Preference Management**.  
The Preference Management page displays.
5. Click the **Change Password** link to open the Change Password page.

The screenshot shows a web interface for changing a password. On the left, there is a 'Preference' sidebar with a 'Change Password' link. The main content area has a 'Menu' dropdown and buttons for 'Submit', 'Reset', and 'Help'. Below these are the following fields and elements:

- User ID: ADMIN
- Old Password \* (text input)
- New Password \* (text input)
- Confirm New Password \* (text input)
- Password Strength indicator (a progress bar)
- Requirements link

6. Enter your old password, then the new password.

If you want to know your agency's password requirements, click the **Requirements** link.

7. Click **Submit**.


## Accessing Civic Platform Administration from the New UI

Admin level users can access Civic Platform Administration from the Settings menu. If you don't see the links in the Settings menu, you don't have access.



**Note:** If you are an administrator and you want to check the result of your configuration in the back-office application, exit the Administration tool to go back to the back-office application within the same browser session. Avoid opening separate browser sessions for Administration and back-office application.

### To access Civic Platform Administration from the new UI

1. Click Settings  in the upper right-hand corner.

2. Select either **Administration** or **Classic Administration** from the Settings menu.

For details about accessing the administration tools, see *Civic Platform Administrator Guide* > Getting Started > Navigating to the Setup Portlet.

## Navigating the New User Interface

The new Civic Platform user interface provides a number of navigation options that you can use to find the pages you need so you can do your job. The topics listed below describe these options.

### Topics

- [Switching Between Dashboards](#)
- [Using Search in the New Civic Platform User Interface](#)
- [Using the Launchpad](#)
- [Working with Spaces](#)
- [Interacting with the Task Dashboard](#)
- [Interacting with the Map Dashboard](#)

As with anything, the best way to familiarize yourself with the tools at your disposal is to try it out for yourself.

### Switching Between Dashboards

The tasks dashboard displays by default when you log in or when you return to the home page. However, a maps dashboard is also available which offers a map-centric view.

A dashboard toggle lets you switch between the two dashboards. This toggle is located at the top of the main menu.



When this icon displays, the task dashboard is the current view.




When this icon displays, the maps dashboard is the current view.


### To toggle between dashboards

1. Click the dashboard toggle at the top of the main menu.

2.

Choose  for the task dashboard.

3.

Choose  for the map dashboard.

### Using Search in the New Civic Platform User Interface


There are a number of ways to search for data in the new interface.

- The global search tool in the main menu gives you the ability to locate the information you need. When you search on a word or phrase, the global search engine returns all records that contain the search criteria, regardless of the record type. Search results are sorted by record type, making it easier for you to find what you need. (See [Performing a Global Search](#).)
- Reference data lookups are available via the launchpad. When you select any of the reference data lookups, you can enter search criteria to locate the reference data you need. (See [Performing a Reference Data Lookup](#).)
- Individual page search functionality allows you to look for a particular record within the data set supported by the page you are on. (See [Performing an Individual Page Search](#).)

## Performing a Global Search

Global search allows you to find records quickly by entering a simple search criteria on the search box. The global search results list includes the Record (ID and record type), Status, Applicant, Reported Type, Location, and Short Notes columns.

### To use global search

1. Click the search button  in the main menu.
1. Enter search criteria. For example, enter a last name.
2. Press **Enter** (or click **Search**).  
Search results display, with the results grouped by record type.

PETALUMA Civic Platform Administrator Accela

commercial SEARCH

"commercial" (77 results)

Records (32) Locations (1) License Professionals (10) Documents (32) Assets (1) Parcels (1)

Showing 1 - 10 of 32 | Sort: Most Recent

Record	Status	Applicant	Reported Type	Location	Short Notes
SLM-12-0032 AMS/Parks/Maintenance/NA	Pending Work Order Closure	PAM Plovanic	Created On 07/28/2012		
SLM-09-0001 AMS/Parks/Maintenance/NA	Repair Pending		Created On 12/27/2012	PETALUMA, CA	
SLM-11-0015 AMS/Parks/Mowing/NA	Closed	Accela	Created On 03/22/2011	801 E WASHINGTON ST, PETALUMA, CA 94952	
SLM-12-0059 AMS/Parks/Maintenance/NA	Pending Work Order Closure	Accela	Created On 01/05/2013	1101 SANTA BARBARA WAY, PETALUMA, CA 94952	
02-HOC-0050 Planning/Planning Permit/HOME OCCUPATION/HOC		Camacho Residential and Commercial Cleaning and Landscaping	Created On 11/08/2002	418 MCDOWELL BLVD, PETALUMA, CA 94954	
20020200 Building/Building/Commercial/Alteration			Created On 02/21/2002	2200 PETALUMA BLVD N, SUITE# 805 PETALUMA, CA 94952	
CE12-423 Enforcement/Rental Housing Inspection/Unit/RHIU		1	Created On 12/04/2012		
CE13-021 Enforcement/Housing/NA/CODH	Assigned		Created On 01/07/2013	1033 S MCDOWELL, PETALUMA, CA 94952	
CE12-426 Enforcement/Rental Housing Inspection/Unit/RHIU		Accela	Created On 01/05/2013	1640 JEFFREY, PETALUMA, CA 94952	
12CAP-00000158 Enforcement/case/Complaint/NA			Created On 10/30/2012		

1 < > Column View

Search results are grouped by record type.



#### Note:

Search results are persistent for the duration of your work session. If you navigate to another space (for example, you click a record link to view that record), you can always click the search button at any point to return to the search results for the last search you performed. You can enter new search criteria at any time.

- To exit the search page, click the home page link (agency name) or any other space icon.

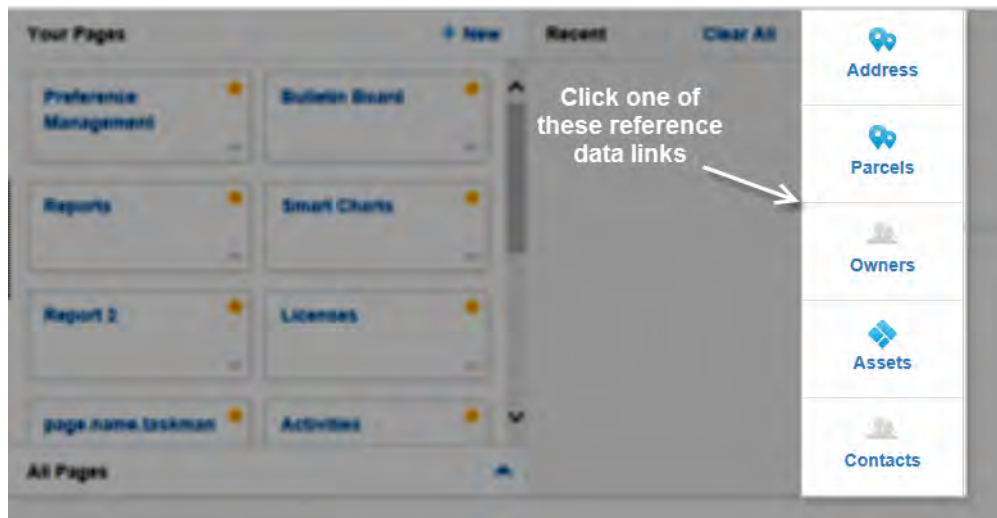
## Performing a Reference Data Lookup

Reference data is data that is stored in the database as an individual data entity, rather than as part of a transactional record. Reference data can then be pulled from the database and used in multiple transactional records.

**Example:** You enter a reference address in the database. Someone in your agency creates a new building license application or adds a new work order for the address you entered. That user can look up the address in the reference database and retrieve the complete address from the database, while establishing a link with that address record. At any point in the future, you can open the reference address record and from that record, access/view all work orders, schedules, applications, and other types of activity for that address, thanks to that link.

### To look up a reference object

1. Click  to access the launchpad.



2. Click one of the reference links available on the launchpad.
3. Enter search criteria and press **Enter** (or click **Submit**).

## Performing an Individual Page Search

Many Automation pages give you the ability to search for particular records contained within that page. For example, you can open the Inspection page and search for all inspections completed by one individual in the month of April. Or you can open the Work Order page and search for work orders that are overdue and not completed.

If you see a Search button in the toolbar of a page, you can search for records.

### To search for records on a page

1. Use the launchpad to open the page you want to work in. If you already have the page pinned to your menu bar, you can click the pinned space icon.
2. Click **Search**.
3. Enter search criteria and press **Enter** (or click **Submit**).

## Using the Launchpad

The launchpad is your one-stop access point for most pages you need to work with. The launchpad has several distinct parts, each of which presents you with a list of hyperlinks you can click to “launch” or access that object.

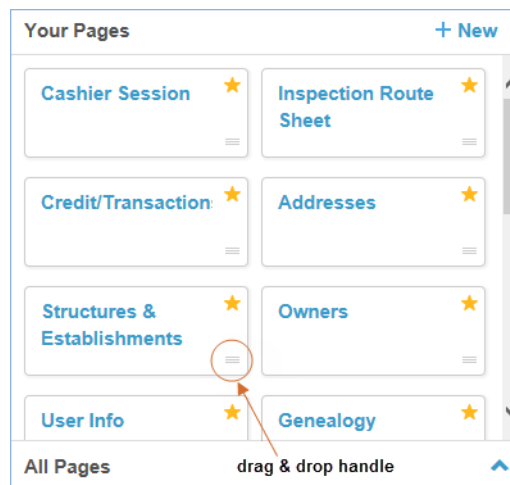
- [About Your Pages](#)
- [Finding a Page](#)
- [Defining a Page as a Favorite](#)
- Recent Records
- Reference Pages


## About Your Pages

The Your Pages area provides you with two alternatives for viewing and accessing page hyperlinks. You can toggle between the views by clicking the All Pages bar, which shifts from top to bottom, depending on which view displays:

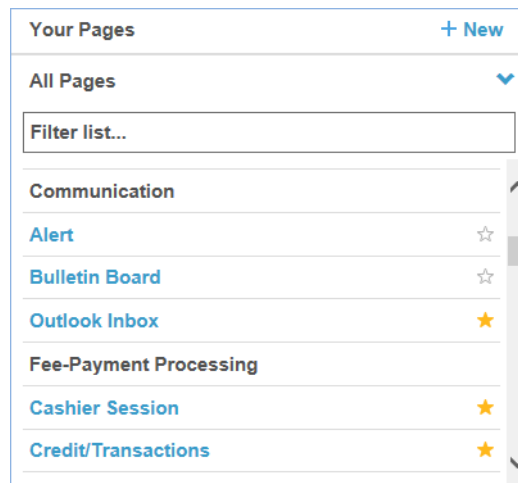


- The default view is a list of pages you have marked as 'favorites.'



To organize the order in which the favorites display, use the handle  on each favorite to drag and drop it where you want it.

- The alternate view, All Pages, is a list of all the pages that your user profile allows you to access, sorted by functionality.




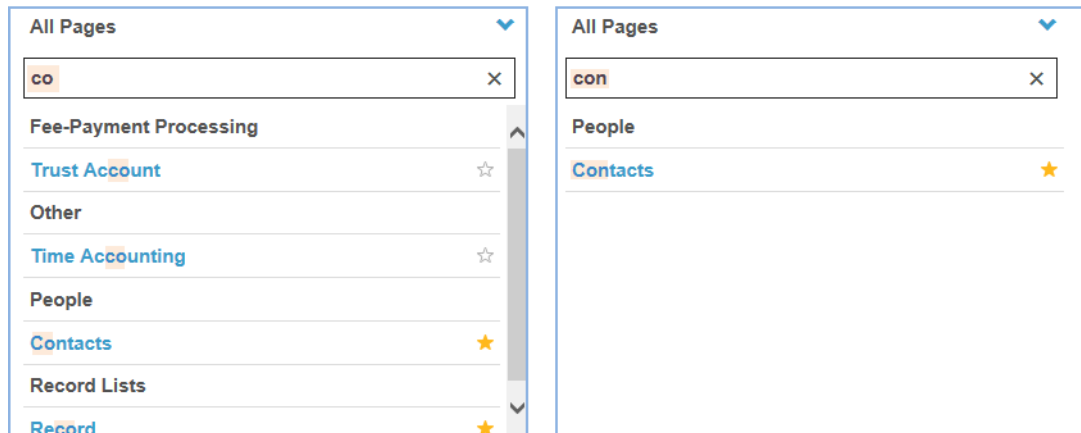
This list cannot be reorganized, but you can filter the list to find what you are looking for.

## Finding a Page

You can scroll up and down the page views to find a page link, or you can apply a filter to locate a page quickly in the All Pages view.

**To find a page by applying a filter**





1. Click  to access the launchpad.
2. Click **All Pages** at the bottom of the Your Pages section.  
The display changes to a list of all accessible pages, sorted by functionality.
3. Enter the page name you want in the **Filter list...** box.  
As you enter each letter, the list of pages below the box adjusts to display those pages that match in full or in part what you are typing.  
In the example below, entering **co** displays a number of pages with “co” in their titles. Adding an additional **n** makes a big difference.



## Defining a Page as a Favorite

The ability to mark pages as favorites enables you to set up the launchpad to suit your individual work requirements. The pages you mark as favorites are the first ones displayed whenever you open the launchpad. You can have as many favorite pages as you want, but remember: too many favorites may defeat the purpose. If you have too many favorites in your list, you can easily remove them the same way you added them.

### To select or deselect a page as a favorite

1. Click  to access the launchpad.
2. Click **All Pages** at the bottom of the Your Pages section.  
The display changes to a list of all accessible pages, sorted by functionality.
  -  A gold star means a page is currently marked as a favorite.
  -  A white star means a page is not marked as a favorite.
3. Locate the page you want to select or deselect as a favorite.
4. Click the star.  
The star color changes color (yellow to white, or white to yellow)
5. Click **All Pages** at the top of the Your Pages section to return to the Favorites list.
6. If you created a new favorite, you can use the handle  on the new favorite to drag and drop it where you want it to appear.



## Accessing Recent Records

The launchpad provides you with a list of recently visited applications and records. Records display in the order of when they were last accessed, most recent first.

You can click any record in the list to launch it in a new space.

If the recently visited list gets too long, you can clear the list. Be aware that, when you clear the list, the action is permanent.

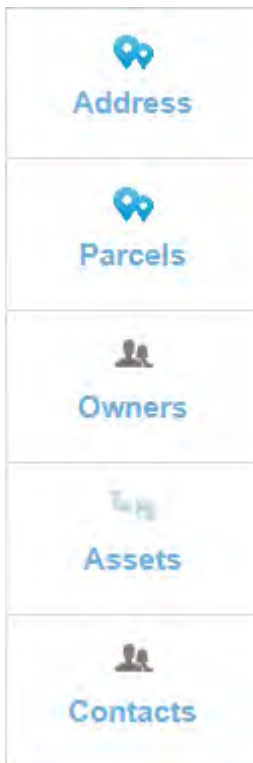


### Note:

You don't need to rely on the list of recent records to access ongoing work. Open any record in a new space that you work with a lot, then pin that record to the spaces menu. It will remain pinned there until you unpin it. To access the record, click the pinned space in the menu

## Accessing Reference Pages

The launchpad makes access to reference data easy. On the right edge of the launchpad is a series of links that enable you to look up reference data when you need it.



Click a link to display a lookup form where you can define the search criteria needed to locate the reference data you want to see.

### Related Links

- [Performing a Reference Data Lookup](#)

## Working with Spaces

When you open a page that shows a record, list or task, Civic Platform opens a space (or "workspace") and adds a button for that space on the main menu. The space buttons on the main menu give you one-click access to any page you have open.

- [Viewing More Spaces](#)

- [Pinning, Unpinning, and Closing Spaces](#)



**Note:** A space on the main menu acts like a browser tab. If you want to work with multiple records or tasks in Civic Platform, use multiple spaces instead of multiple browser tabs. In general, use only one browser tab or session for the Civic Platform UI. Do not use multiple browser tabs or multiple browser sessions to open multiple Civic Platform records and tasks.

## Viewing More Spaces

A total of 6 spaces display in the spaces menu at any one time, with the most recently opened space at the top.

If you have more than 6 spaces open (up to a maximum of 20), you can access them by clicking the **More** link at the bottom of the spaces menu.



The 'more spaces' panel displays the spaces that don't fit on the menu. It also keeps a running count of the number of spaces you have open.

## Pinning, Unpinning, and Closing Spaces

If you have certain pages you work with a lot, or if you have a record that you are having to return to frequently, you can open the record or page in a space and pin it to the spaces menu. Pinned spaces stay put until you unpin them.



**Note:**

Just because you pin a space does not mean that it will not be demoted down the spaces menu if you open other spaces.

### To pin, unpin, or close a space

1. Click the Space Options button on the space you want to work with.



2. Select the action you want to perform from the menu of options: **Pin**, **Unpin**, or **Close**.

If you pinned the space, a thumbtack image appears in the upper right-hand corner, which is your visual flag that this is a pinned space.

If you uninned the space, the thumbtack image disappears and the space can be closed.  
 If you closed the space, it is removed from the spaces menu.

## Interacting with the Task Dashboard

The tasks dashboard is your to-do list, calendar, and work tracking venue. It is also your home page, so it is always accessible (see [Getting there](#)).

You can interact with your tasks in both the card view and the list view. Each view has distinct benefits, and many users like to switch between views to take advantage of functionality that is unique to one view or the other.

The following sections discuss in more detail how you can use both views to work efficiently and effectively.

- [Using the Task List](#)
- [Getting the Most from Your Task Cards](#)

## Using the Task List

The task list view gives you the ability to view many tasks at once in a table format. This can be very useful when you want to compare like values for differing tasks.

For example, you can quickly compare due dates of assignments in your queue, as shown in the image below.

<input type="checkbox"/> Footings & Forms 15CAP-00000018	08:00 AM Jun 30	Passed Duration(min): 0	Address: Address not defined
<input type="checkbox"/> Ins Inspection type 1 15CAP-00000013	Jun 22	Scheduled Duration(min): 1428	Address: 123 123 Ave, Apt# 123 123,
<input type="checkbox"/> Kevin	May 7	In Process	Activity id: 317813
<input type="checkbox"/> Plans Distribution ncpl-0424	May 5	Note	Assigned to: Accela Administrator
<input type="checkbox"/> Storm Water Quality Final ncpl-0424	May 3	Scheduled Duration(min): 1428	Address: 5 CASA GRANDE RD, PETA
<input type="checkbox"/> Temp Power ncpl-0424	May 1	Passed Duration(min): 1428	Address: 5 CASA GRANDE RD, PETA
<input type="checkbox"/> Footings & Forms ncpl-0424	10:00 AM Apr 30	Scheduled Duration(min): 0	Address: 5 CASA GRANDE RD, PETA

Figure 7: Comparing Data in List View


If you have tasks with conditions, you can click the condition icons in the list view for more information, just as you would in the task card view. See [Getting More Information About Conditions, Holds, Notices, and Locks](#).

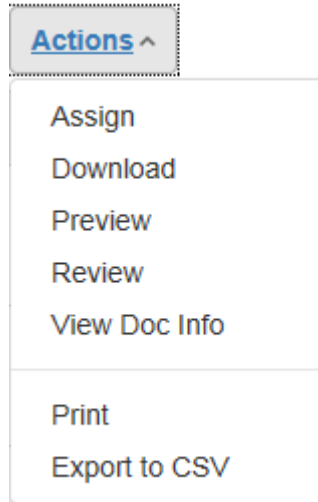
<input type="checkbox"/>	CAP-00201	May 23	Duration(min): 0
<input type="checkbox"/>	Rental Housing Inspection 000000000000207	8:30 AM	Scheduled Duration(min): 85
<input type="checkbox"/>	Abandoned Vehicle CAP-00208		Duration(min): 45

Condition Text Displays Here  
LOCK applied May 18

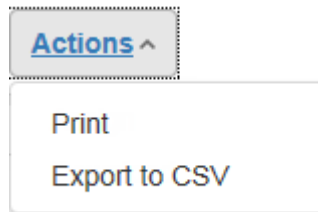
By default only six tasks display when you first open the task list view. You can use the **Load More...** link at the bottom of the page to expand the task list in increments of six.

You can perform actions on one task or select multiple tasks and perform a batch action on them. The list of actions available for you to perform varies, depending on the type and quantity of tasks you want to perform an action upon.

For example, if you select a single document review task and click , the available actions you can perform on a document review task display.

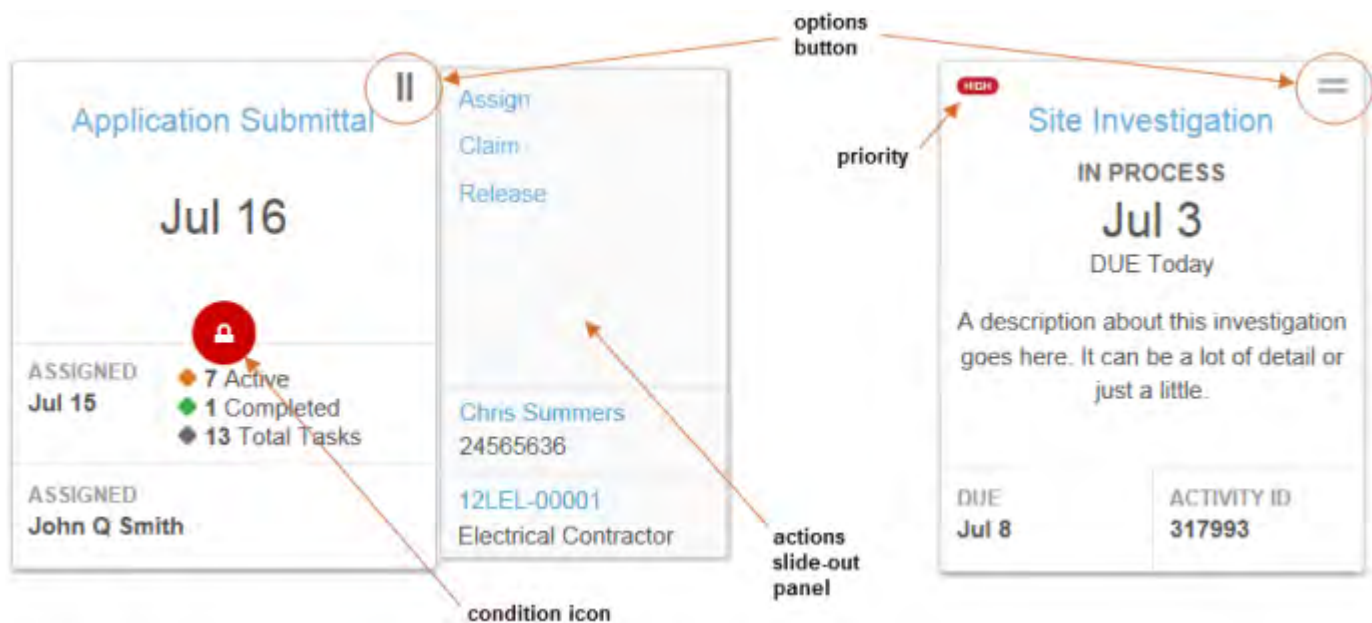


If you select more than one task and then click **Actions**, the available actions include only those that you can apply to ALL selected tasks.



## Getting the Most from Your Task Cards

Task cards provide a nice visual for browsing, but more importantly, they also provide a significant amount of relevant information and functionality that can help you plan your course of action to address your task.



## Topics

- [Details You Can Glean from a Task Card](#)
- [Things You Can Do on a Task Card](#)
- [Getting More Information About Conditions, Holds, Notices, and Locks](#)

## Details You Can Glean from a Task Card

- **Priority.** Some tasks have a priority flag. Find it in the upper left-hand corner.
- **Conditions, Holds, Notices, and Locks.** The image above shows a lock condition on the document review task. Click any condition icon to view details about the condition.
- **Times/dates.** Most tasks have a scheduled time/date, a due date, or other relevant date (such as the date of the last status change). This information displays in different locations on the card, depending on what type of task it is. For example, the document review task in the image above shows a last status update date of April 27. The activity task on the right shows a due date of July 3 and a start date of June 29.
- **Status.** Some task types display the task status prominently on the task card. The document review task above shows the status along with the date that the status last changed. The activity task above shows the status immediately below the task card title.
- **Other Details.** Task-centric details can tell you something about how you should interact with that task. Different task types offer different details.

## Things You Can Do on a Task Card

- You can open the task details in a new space (or a slide-out, depending on the type of task) by clicking the task name hyperlink.



### Note:

If the task name displays in black text, you do not have permission to view the task details.

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- You can perform actions via the action slide-out. Which actions you can perform varies by task type.

- You can access the record from which the task originated by clicking the record ID hyperlink.
- You can access the primary contact details by clicking the primary contact hyperlink.
- You can preview documents (doc review tasks only).

## Getting More Information About Conditions, Holds, Notices, and Locks

When conditions, holds, notices, or locks are applicable to a task or to the record from which a task originates, you see one of these icons displayed prominently in the center of the task card.



indicates 'required' task (workflow tasks only).



indicates a lock condition (severity 1) is in place.

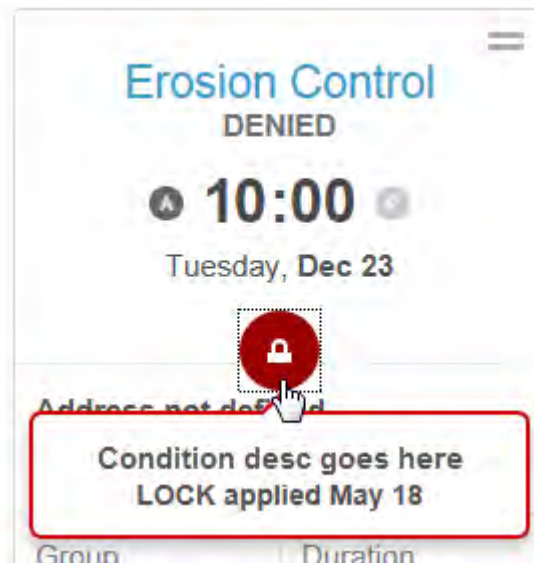


indicates a hold status (severity 2) is in place.



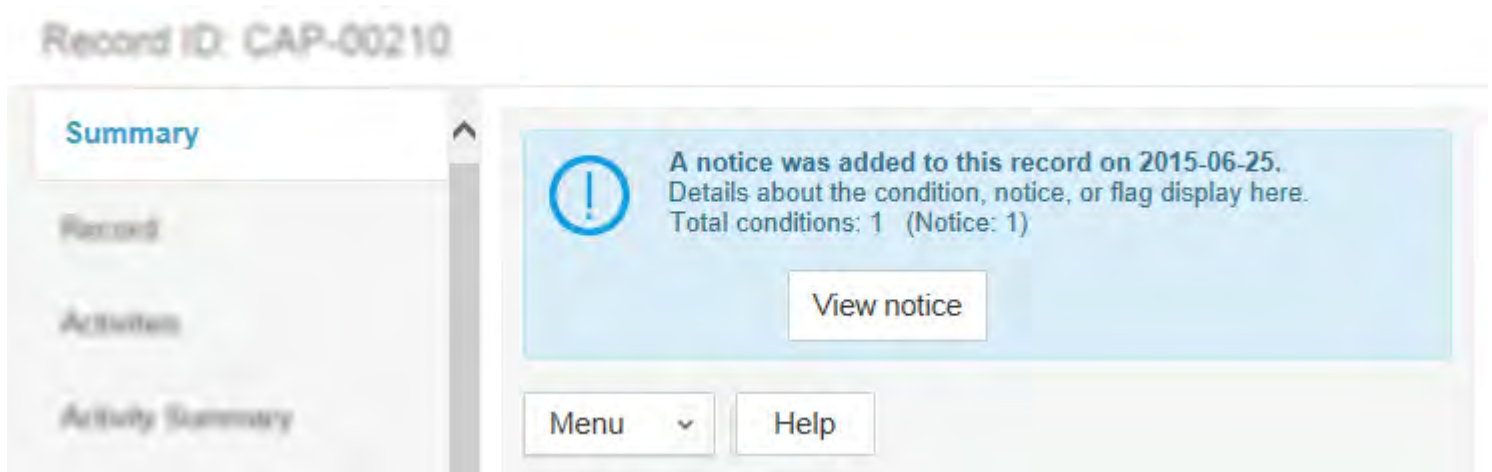
indicates a notice (special instruction) (severity 3) is available.

When you see one of these icons, you can click it to learn more about the reason it is in place.



If you need more information, expand the task action side-out and click the record ID link to open the record in a new space.

The notice displays at the top of the page, but in more detail.



If you need even more detail than this, click **View notice** to open the condition details in a new window.

### Looking at Task Card Examples

Task cards provide you with a number of useful details at a glance. They also provide you with one-click access to the record of origin. See the examples below to learn more about what data displays in the task cards.

- [Inspection Task Card](#)
- [Document Review Task Card](#)
- [Activity Task Card](#)
- [Workflow Task Card](#)
- [Meeting Task Card](#)

### Inspection Task Card

**inspection type and status** → Plumbing SCHEDULED

**scheduled time and date** → 08:00 Wednesday, Jun 17

**inspection location** → 2633 CAMINO RAMON ST, Suite...  
SAN RAMON

**inspection group** → Group: Building, Duration: 2 HRS

**actions you can perform for this inspection** → Cancel, Delete, Reschedule, Result

**record number & record type** → 15CAP-00000001 Building/Property M...

**amount of time scheduled for the inspection** → 2 HRS

### Document Review Task Card

**task name** → SampleFloorPlan.pdf

**task comments** → Page #: 3; Comments: please review before site visit.

**preview document** → [PDF icon]

**review status** → In Review Apr 27

**document category** → Category: Site Plan

**actions you can perform for this document** → Assign, Download, Preview, Review, View Doc Info

**record number & record type** → 15CAP-00000015 Building/000PHP/Te...



### Activity Task Card

Annotations for Activity Task Card:

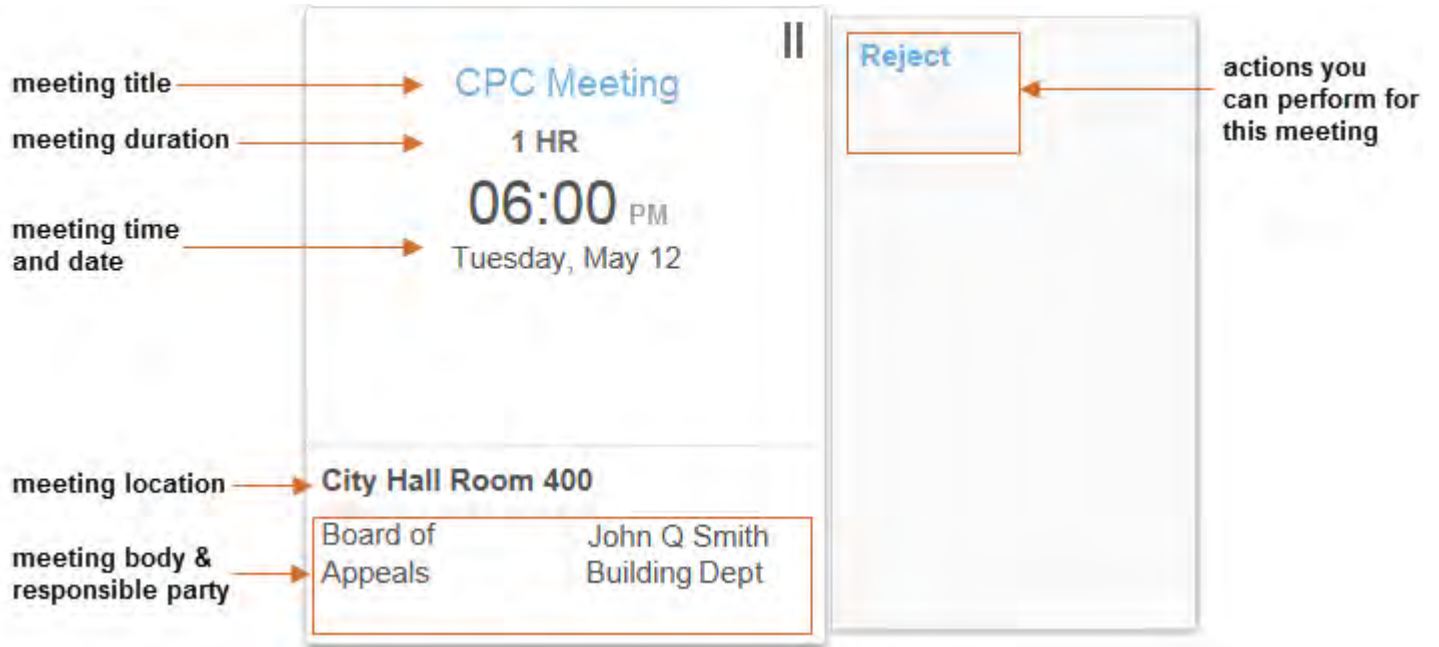
- priority → HIGH
- activity name & status → Site Investigation IN PROCESS
- activity start date → Jun 29
- reminder of impending due date → DUE Today
- description of activity → A description about this investigation goes here. It can be a lot of detail or just a little.
- activity due date & activity ID → Due Jul 3, Activity ID 317903
- actions you can perform for this activity → Delete
- record number & record type → 15BLD-00000-00033 Building/Building Per..

### Workflow Task Card

Annotations for Workflow Task Card:

- workflow task title → Environmental Review
- task due date → Jul 3 DUE Today
- click the condition icon to view details → [Condition Icon]
- date that the task was assigned → ASSIGNED Jul 2
- person responsible for task completion → ASSIGNED John Q Smith
- actions you can perform for this workflow task → Assign, Claim, Release
- workflow tree status → 5 Active, 0 Completed, 13 Total Tasks
- primary contact → Demo User Applicant
- record number & record type → 000000000000265 Building/nancy/nancy...

## Meeting Task Card



## Interacting with the Map Dashboard

See [Geo-locating Records](#).

# Records

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Choose a topic from the list below to learn more about records.

## **Related Information**

[Records Overview](#)

[Creating a Record](#)

[Submitting a Partially Completed Record](#)

[Deleting Records](#)

[Managing Record Comments](#)

[Adding Documents to a Record](#)

[Assigning Inspection Districts to a Record](#)

[Viewing Record Information](#)

[Working with Status History](#)

[Printing an Application](#)

[Viewing the Summary page](#)

[Viewing Inspections on the Summary Page](#)

[Assigning a Record](#)

[Closing a Record](#)

[Running a Report from a Record](#)

[Managing Alerts](#)

[Managing Application Record Hearing Agendas](#)

[Working with Associated PERMITS Plus APDs](#)

[Examining Record Details](#)

## Records Overview

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Each of the entries in a list portlet is referred to as a record. Civic Platform users may work with many types of records in their daily duties. Records include objects such as applications, cases, licenses, permits, service requests, and work orders.

### About Application Records

An application gives an applicant official permission to initiate a process, such as a permit application to build a structure or change an existing building in some way. The initial application lets your agency gather any necessary information, such as applicant information, contact information, work descriptions, addresses, and other details. Your system administrator can set up various types of applications to help you gather and manage the different data that you need to collect for each type of application that your agency uses.

Agencies typically incorporate an application process into a departmental workflow, which ensures consistency by defining tasks to complete, and assigning personnel to those tasks.

After an application is submitted, it continues to play a central role in the building and inspection process, as well as with the associated fees and contacts involved. You can search for applications and update them with new information, you can enter inspection results, you can run reports, and you can manage financial transactions inherent to the application process.

If your agency has access to data from another Accela permitting system such as Kiva or 'PERMITS' Plus, your agency can set up the application process to retrieve reference data from those systems, and add it to new applications. Contact your Accela administrator for information about the resources available to you.

### About Service Request Records

A service request is a request within an agency to perform a task or service for its citizens and employees. For example, a citizen calls about potholes in need of repair or an agency inspector approves the plumbing in a new building, and then requests that the agency turn on the water for the building. A service request can be any request by a person for any type action for which the agency is responsible.

Civic Platform allows you to update service request information and access additional service request features. You can view or update service request tasks, assign service requests to other users, or create new service requests.

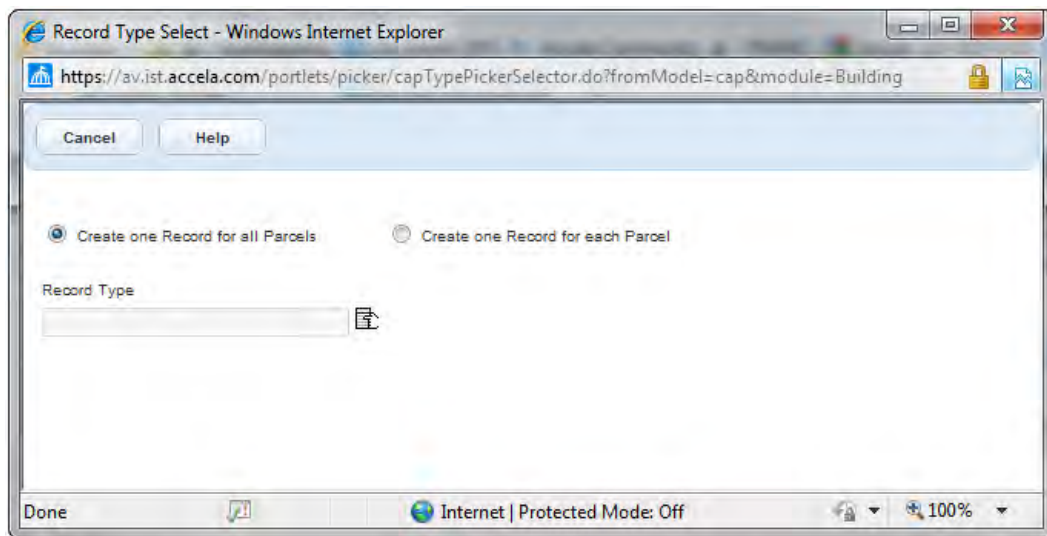
## Creating a Record

Although the information you collect on application intake forms can vary, the process for creating a record is straight-forward. This section details the steps to follow when creating a record from an application intake form. Discussions about the different parts you see in your application intake forms and how to interact with each part follow.

### To create a new record

1. Navigate to the desired portlet; for example, the Building portlet.
2. Click **New**.

Civic Platform displays the Record Type Select portlet.



3. If prompted, select one of the following options:
  - **Create one Record for all Parcels** to create one record for all parcels.
  - **Create one Record for each Parcel** to create a separate record for each individual parcel listed on the permit form.
4. Define the type of record you are creating by selecting a group, a type, a subtype, and a category, in that order.



#### Note:

The subtype and category might auto-populate for some applications, depending on your agency settings.

- If your display shows drop-down lists, select the desired group, type, subtype, and category from those drop-down lists.
  - If your display shows a type picker, drill down to the type of permit you want to create. To do this, click the plus (+) to the left of the group, then repeat for the type, subtype, and category until you see the type of permit you want to create. Select the desired permit type.
- Civic Platform displays an application intake form that contains a series of fields that it groups by section. Which sections and fields are available varies, depending on how your agency configured the form, and what type of application you are completing.
5. Do one of the following tasks as appropriate for your system configuration.

**To retrieve data from 'PERMITS' Plus:**

- a. Click the **'PERMITS' Plus** button at the top of the portlet. If you do not see this button, the option is not available.  
Civic Platform displays the 'PERMITS' Plus search portlet.
- b. Enter search criteria to locate the data you want and click **Submit**.  
Civic Platform displays 'PERMITS' Plus records in a separate portlet.
- c. Click the **ID link** of the record you want to reference.  
If you used the 'PERMITS' Plus icon to obtain parcel data or owner data, click the **Get Address and Owner** button to find the address, owner, and parcel data.  
Civic Platform copies the information from 'PERMITS' Plus into your application.

**To retrieve data from Kiva in any section:**

- a. Click the **Kiva** button at the top of the section. If you do not see this button, the option is not available.  
Civic Platform displays the Kiva Search portlet.
  - b. Enter search criteria to locate what you want in Kiva and click **Submit**.  
Civic Platform displays Kiva records in a separate portlet.
  - c. Click the **ID link** of the record you want to reference.  
If you used the Kiva icon to obtain parcel information or owner information, click the **Get Address and Owner** button to find the address, owner, and parcel information.  
Civic Platform copies the information from Kiva into your application.
6. Click **Validate** to confirm that all the required fields are complete.
  7. If available and applicable, click **Estimate Fee** to add a fee schedule to the application. For more information about estimating fees, see [Estimating Fees](#).
  8. You can save your work in two ways:
    - Click **Save without Submit** to save a partially completed application without committing it to the database. The workflow does not start until you click **Submit**.
    - Click **Submit** to save the form data as a new record and initiate applicable workflows. If you see a "Validation failed" message, you have a required field or section you did not populate.  
If configured to do so for your agency, a default inspection type window displays.
  9. Select the inspection(s) you want to schedule.
  10. For each inspection type you select, define complete the following fields.
 

<b>Required/Optional</b>	Choose <b>Optional</b> (the permit can proceed without this inspection), or <b>Required</b> (your agency must perform an inspection before you can issue a permit).
<b>Unit Nbr</b>	Select the inspections unit number from the drop-down list. Unit values are configurable, but typically represent either the number of hours, or the number of inspections.

---

*What is the Unit Number for?*

*Agencies can configure inspections so that Civic Platform uses inspector profile information (which includes a maximum daily number of inspection units) to automatically assign and schedule inspectors. An inspection unit is the number of inspections, number of hours, or another value.*

*When you select a unit for an inspection you are adding, Civic Platform uses the value you enter, along with the number of units available to an inspector when it auto-assigns and schedules the inspection.*

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**11. Click Submit.**

Civic Platform generates the Record ID, updates the record list, and schedules the selected inspections.

## Creating New Records in the New UI

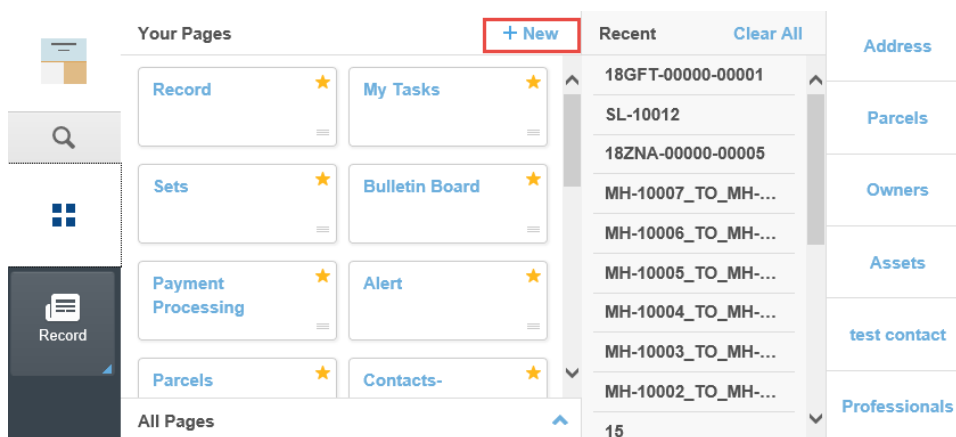
The New UI enables you to quickly create new records by searching and navigating a personalized group of record types, which your agency administrator creates for you. When you create new records using the new UI, you can also search for the record type by its alias name, which can make it simpler to find the record type you're looking for.

For information on setting up this functionality, administrators can search for configuring record type filters, refer to the *Civic Platform Administration Guide*.

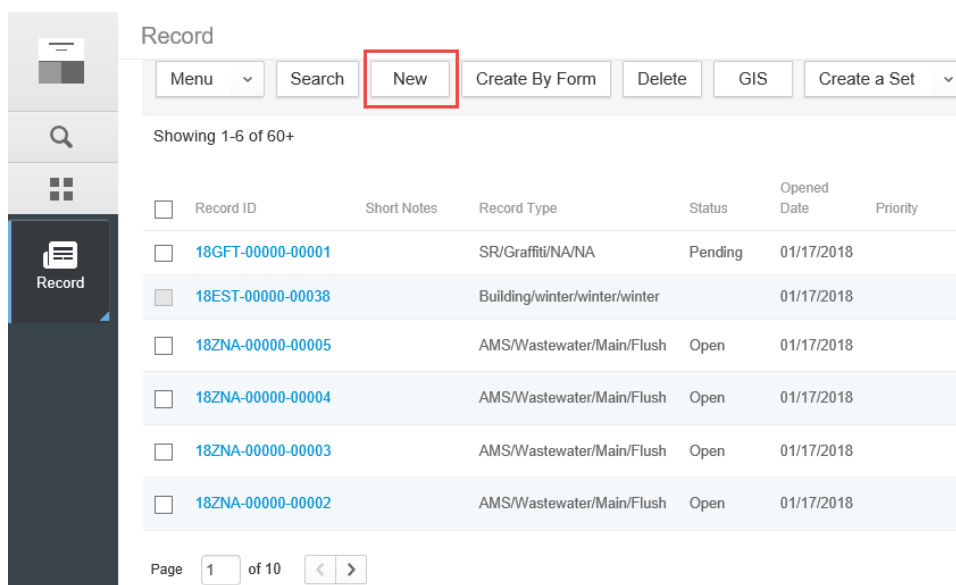
### Creating a New Record

1. In the New UI, there are several ways to create a new record. Navigate to one of the following areas and click **New** or **Clone**, as appropriate.

- **From the Launchpad:**

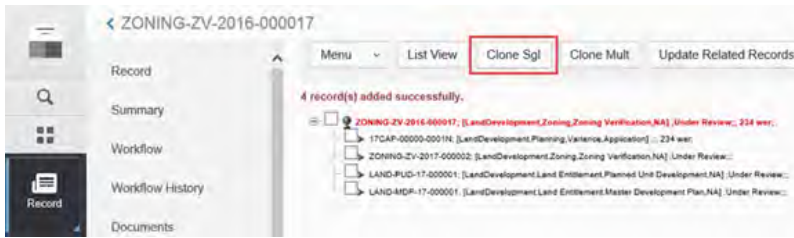


- **From the Records page:**

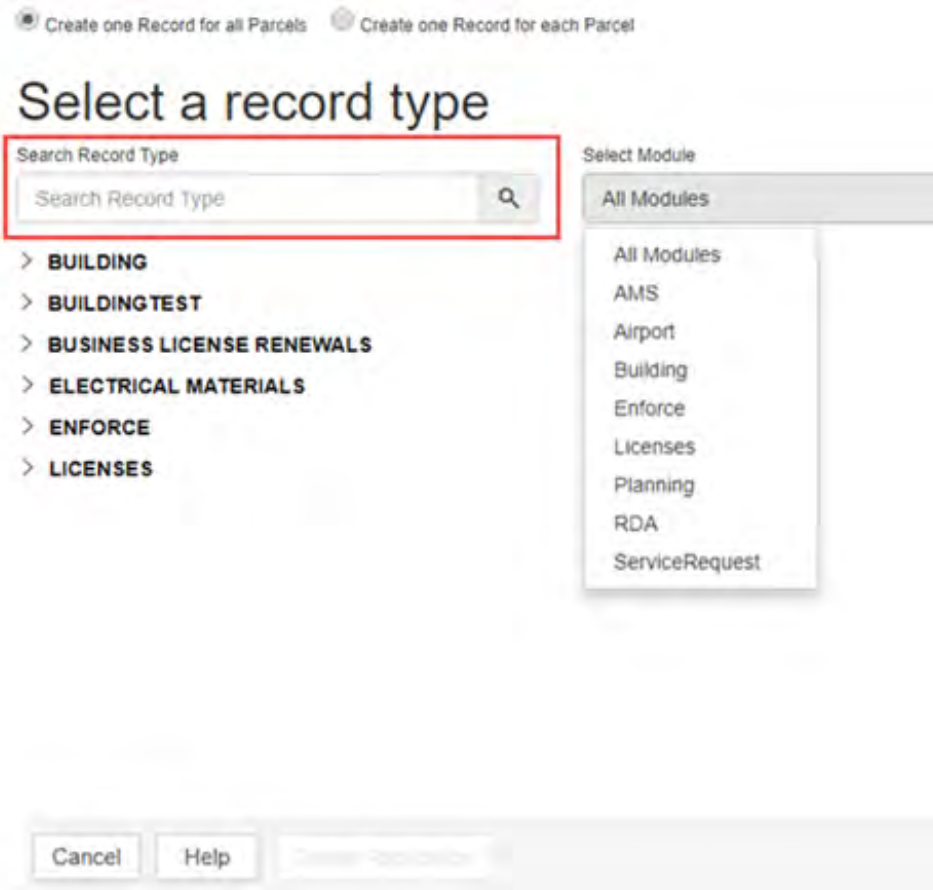


- **From the Related Records page:**





2. You can search for a record type using all or part of the record's alias name. If you do not know the record's alias name, navigate to the record type by selecting the module.



3. Click the name of the record type filter (for example, Business License Renewals), and then select the record type you want to create.

The following example shows **Licenses** as the selected module, **Business License Renewals** as the record type filter, and **Business License Renewals** as the record type.

Create one Record for all Parcels
  Create one Record for each Parcel

## Select a record type

Search Record Type

Select Module

- > BUILDING
- > BUILDINGTEST
- > BUSINESS LICENSE RENEWALS
  - Business License
  - Business License Renewal**
- > ELECTRICAL MATERIALS INSPECT
- > ENFORCE
- > LICENSES

4. Click **Create Application** to proceed to the application intake form.



**Note:** The **Create Application** button remains inactive until you select a specific record type. Once you find and select the record type from the list, the **Create Application** button is active and you can proceed to the intake form to complete the details.

### Searching for a Record Type

You can search for a record type by entering a record's alias name – or even part of its alias name – in the **Search Record Type** field. The following shows that when a user enters, for example, "bu" in the search field, Civic Platform returns all record types containing "bu" in the record's alias name.

## Select a record type

Search Record Type

▼ **BUSINESS LICENSE RENEWALS**

Business License Renewal

Business License

▼ **CXCCC**

Business License

▼ **NURSING LICENSE**

Business License

Cancel

Help

## Submitting a Partially Completed Record

Agency users can submit partially completed applications, which enables them to process payments, generate deficiency letters, and perform other activities.

Agency administrators can configure Civic Platform so that users can defer validation on partially completed records (see "Enabling Submittal of Partially Completed Applications" in the Civic Platform Administrator Guide). When you submit a record without validation, Civic Platform sets a Pending Validation flag on the newly created record. Civic Platform also creates a "Generated by Cloning" flag which defaults to No.

### To defer the validation of a record

1. Create a record based on an application (see [Creating a Record](#)). Complete the fields for which you have information; leave blank any fields for which information is missing.
2. Click **Submit**.  
If the record contains incomplete fields Civic Platform displays this message:  
"Validation failed. Do you still want to submit the record?"
3. Click **OK** to submit the record without validation.
4. When you receive the missing information and/or missing documentation for the application, enter it into the record's required fields, and satisfy any conditions of approval on the record.
5. When you are ready to validate the application, navigate to the Workflow tab and update the status accordingly.

In this example, the administrator set the workflow task status that triggers the validation of the application to the Application Acceptance task, Accepted status.

Update the workflow for the Application Acceptance task to Accepted, as shown below.

The screenshot displays the 'Task Details - Application Acceptance' interface. On the left, a 'Workflow Tasks' sidebar lists 'Application Acceptance', 'Site Investigation', 'Committee Review', and 'Facility Inspection'. The main area shows task details:

- Assigned Date:** 03/25/2014
- Assigned to Department:** DEMO/ENGINEER/NA/NA/NA/NA/NA
- Current Status:** In Review
- Action By:** Current User (John Q Smith)
- Due Date:** 03/25/2014
- Due Date:** 03/25/2014
- Action By Department:** (blank)
- Status Date:** (blank)
- New Status:** Accepted (highlighted with a red box)
- Comments:** (English)common.commer

A 'check spelling' link is visible at the bottom of the comments field.

6. Click **Submit**.  
Civic Platform displays the following message:  
Workflow cannot be updated until the application has been validated. Click OK to open the application form for validation or Cancel to abort the action.
7. Click **OK**.  
The application form displays.
8. Click **Validate**.

Scroll through the application and verify that all required fields are complete, then click Submit.  
When Civic Platform successfully validates the record, the workflow status updates to Accepted.

## Understanding Application Form Details

---

Application intake forms group data fields by section. Which sections are available on an application varies by application type and by agency. For information about many of the available sections, choose a topic below.

### Topics

- [Working in the Applicant and Contact Sections](#)
- [Working in the Address Section](#)
- [Working in the Documents Section](#)
- [Working in the Parcel Section](#)
- [Working in the People Section](#)
- [Working in the Structures or Establishments Section](#)
- [Working in the Application-Specific Information Section](#)
- [Working in the Application-Specific Information Tables Section](#)
- [Working in the Education Section](#)
- [Working in the Continuing Education Section](#)
- [Working in the Examination Section](#)

### Working in the Applicant and Contact Sections

A contact can be any person who has some involvement in the application process, including the applicant, billing contacts, and legal contacts. The Applicant and Contact sections of an application allow you to include contact information in new applications.

### Topics

- [About the Contact Section](#)
- [Adding a Contact](#)
- [Adding Contact Addresses for a Contact](#)
- [Setting a Primary Contact](#)
- [Validating a Contact](#)
- [Deleting a Contact](#)
- [Editing a Contact](#)

### About the Contact Section

The application intake form can have up to three individual contact sections for entering single contact data, or it can have a contact list section for entering an unlimited number of contacts.

- The image below shows an example of a contact section for entering single contact data.

**Billing Contact** *(This section is not required.)*

Contact Type  Individual  Organization

Contact Type\* 
 Primary 
 Organization Name

Full Name 
 Phone

First Name\*  MI  Last Name\*

Street Address 
 City 
 State 
 Zip Code

**Billing Contact Address**

<input type="checkbox"/>	Contact	Address Type	Start Date	End Date	Recipient	Full Address	Address Line 1
<input type="checkbox"/>	Address ID						

0 record(s) found.

- Before you add any contact, the Contact list section looks the same as the single Contact section except that it does not display the Contact Address sub section. After you add contact(s) to the section, the Contact list section displays the contact(s) in a list.

**Contact** *(This section is required.)*

<input type="checkbox"/>	Contact Number	Primary	Full Name	Type	Contact Type	Organization Name	Telephone	E-mail
<input type="checkbox"/>		<input checked="" type="radio"/>		Applicant	individual			

If you click a contact in the list, a new window displays with the single contact entry form which looks the same as the single Contact section and includes the Contact Address sub section.

## Adding a Contact

Depending on the type of record you are creating, there are various ways to add contact information to an application intake form. You can enter new contact information, use existing owner or licensed professional information, copy existing contact information, search for contacts, and add reference contact information. The validation setting of the Contact section determines which methods are available to you.

If the Validate button displays in the Contact section, you must validate the section against reference contacts after adding a contact. For more information, see [Validating a Contact](#).

If the Contact Address sub section displays in the Contact section, you can add, look up, or remove contact addresses of the contact. You must enter required contact addresses. For more information, see [Adding Contact Addresses for a Contact](#).

### To search for and add reference contacts

#### 1. Do any of the following:

- Navigate to the Applicant or Contact section for entering single contact data.
- Navigate to the Contact section that is for entering multiple contact data but you have not added any contact to and click the **Search** button to go to the Contact List pop-up window.
- Navigate to the Contact list section.

#### 2. Click **Search**.

#### 3. Complete any fields that display and click **Submit**.

You can either search by contact standard fields, activities, or contact addresses. For a description of the fields, see [Contact and Applicant Detail](#) and [Contact Address Fields](#).

Civic Platform returns a list of contacts that match your search criteria.



**Note:**

Civic Platform ignores the contact type when performing the search, and returns all the reference contacts that meet the other criteria settings.

If you are adding a contact in a single contact section, there is an “Add Contact” icon next to each contact.

First Name	Last Name	Contact Type	Type	Reference Contact ID	E-mail
Suzanne	Quaid		Citizen	791059	squa...
David	Patterson	individual	Appl...	791055	ksaw...
	Main	individual	Shar...	791058	mmai..

If you are adding contacts in a multiple contacts configuration, each contact has a check box, enabling you to select one or more contacts to interact with.

<input type="checkbox"/>	First Name	Last Name	Organization Name	Contact Type	Type	Home Phone	E-mail	Reference Contact ID
<input type="checkbox"/>	David	Patterson		individual	Appl...	9287149220	ksaw...	791055
<input type="checkbox"/>	Michael	Main		individual	Shar...	9287734180	mmai...	791058
<input type="checkbox"/>	Suzanne	Quaid			Citizen	801-495...	squa...	791059
<input type="checkbox"/>	Matthew	Ryan	MCR Constructio...		Cont...	(928) 5...	mcr@...	791159
<input type="checkbox"/>	Joseph	Bloomingtondale	Bloomingtondale As...		Mana...			791161
<input type="checkbox"/>	Eshely	Song		individual	Appl...	755-498...	luck...	791162

4. If the search results contain the contact(s) you want to add:

- In the single contact section, click the icon next to the contact you want to add.  
If available, you can click the Associated Contact link next to the contact to view the contacts associated with the selected contact, and click the icon beside the contact you want to add.  
Civic Platform adds the contact information to your application intake form.
- In the multiple contact section and in the contact list section, choose the contacts you want to add and click **Select**.  
To view records that are associated with the selected contacts, select the desired contacts, then click **Search Associated**. Select the contacts that you want to add and click **Select**.  
Civic Platform adds the contact information to your application intake form.

5. If the search results do not contain the contact(s) you want to add:



- Click **Close Matches** to retrieve close match contacts. For more information on close match search, see [Looking for Close Matches](#).
- Click **New in Reference** to create a new reference contact. After you complete the fields in the popup Contact New Form (see [Contact Detail Fields](#)), click **Submit**.

When you see the contact(s) you want to add in the search results list, perform [If the search results contain the contact\(s\) you want to add:](#)

6. If the selected contact(s) has multiple contact addresses, you can select the contact addresses to add from the contact address look up form by selecting the desired contact addresses, then clicking **Select**. If the selected contact has only one contact address, Civic Platform adds the selected contact to the record with that contact address.
7. You can also add contact address(es) for the contact in the contact address sub section. See [Adding Contact Addresses for a Contact](#).
8. Confirm that the contact type for the newly-added contact is correct. If not, select the type you want from the drop-down list.

### To populate the contact section with existing owner, licensed professional, or contact data

1. Assuming that you already added an owner, a licensed professional, or a contact to the corresponding section of the application intake form, do one of the following:
  - Click the **As Lic. Prof** button if the contact you want to add is a licensed professional you added in the licensed professional section.
  - Click the **As Owner** button if the contact you want to add is the same as the owner you added in the owner section.
  - Click the **As Contact** button and select an existing contact.



**Note:**

If your contact section supports multiple contacts, the As Contact button is available only on the contact entry form.

---

Civic Platform populates the contact section with information from the existing owner, licensed professional, or contact.

2. Add contact address(es) for the contact in the contact address sub section. See [Adding Contact Addresses for a Contact](#).

### To add a new contact manually

1. Do one of the following:
  - Navigate to the applicant or contact section for entering a single contact.
  - Navigate to the contact section for entering multiple contacts, click **Search**, then click **New**.
  - Navigate to the contact list and click **New**.



**Note:**

If a **Validate** button displays in the application or contact section, you must search for an existing reference contact to add it to the section and then validate your choice. You cannot add a contact to the application by entering contact information manually.

---

Civic Platform displays the contact entry form.

2. Complete any fields that display (see [Applicant and Contact Fields](#)).



**Note:**

If you are working with the multiple contact section or the Contact list section, Civic Platform saves any new information you enter as a new reference contact in the database.

If you are working with the single contact section, Civic Platform does not save the data as a reference contact. Instead, Civic Platform links the new contact to the application.

---

3. Add contact address(es) for the contact in the contact address sub section. See [Adding Contact Addresses for a Contact](#).

## Adding Contact Addresses for a Contact

After you specify the contact type for a contact, you can add contact addresses for the contact in the Contact Address sub section. The heading of the Contact Address sub section might display a warning message telling you that Civic Platform requires certain contact address types for a contact. You must enter contact addresses for the required contact address types before you can save the record successfully.

Before you add contact addresses to a contact that you added to the record by looking up reference contacts, be aware that your change might affect the contact addresses in the associated reference contact or another related record contact. Specially:

- If you create a new contact address or edit a contact address in the record contact, Civic Platform adds or updates the contact address in the reference contact as well;
- If you remove a contact address from the record contact, the contact address still exists in the reference contact.
- If you deactivate a contact address in the record contact, the contact address changes to inactive in the reference contact and also the record contacts which link to the same reference source.
- If you deactivate a contact address in the reference contact, the contact address changes to inactive in all the record contacts which link to the reference contact.
- The primary contact address in one record contact can be non-primary in another one, although the two contact addresses share the same reference source.

### To add a new contact address manually

1. In the contact entry form of the contact you want to work with, click **New** in the contact address sub section.  
Civic Platform displays the contact address form.
2. The address you are adding might require validation:

**Note:**

Even if the Validation button displays, you might only need to validate addresses of certain type and in certain countries. You can first select the address type and country/Region, and try the Validate button to know where you are from the response message. For example,

- The “Address validation is required” message means that the address requires validation.
- “No validation data source is defined” message means that you are creating an address that requires no validation;
- “Failed to connect to the validation data source” message means that the address requires validation but Civic Platform cannot connect to the validation source defined by your administrator.

- If the address you are adding requires no validation, complete the fields as described in [Contact Address Fields](#).  
Civic Platform leaves the Validated field empty.
- If the address you are adding requires validation, complete the following steps:
  1. Specify the **Address Type** and **Country/Region** fields, and complete a few more fields as described in [Contact Address Fields](#).
  2. Click the **Validate** button.  
Civic Platform displays the Contact Address Validation List, with the matching addresses from the external validation source.
  3. To add an address from the list, choose the desired address, then click **Select**.  
Civic Platform populates the contact address fields with the information from the selected address, and sets the Validated field to Yes.
  4. If you do not want to accept any of the validated addresses, click **Cancel**.  
Civic Platform sets the Validated field of the address to No.
- 3. Click **Submit** to save the contact address to the current contact.

**To look up and add a contact address from the reference contact**

1. Open the contact form for the contact you want to work with.
2. Click the **Look Up** button in the Contact Address sub section.  
Civic Platform displays the Contact Address Look Up Form. The contact address list contains the contact addresses with address type that is both active and associated with the contact type.

Address Type	Recipient	Address
<input type="checkbox"/> Home	Billie Anderson	San Ramon, CA
<input checked="" type="checkbox"/> Office	Billie Lewis	143rd Street, New York

3. Select the contact addresses you want to add for the contact. If the address type of a listed contact address is a required field for the contact, Civic Platform selects the address by default.

#### 4. Click **Select**.

Civic Platform adds the selected contact addresses to the current record contact.

**Note:**

When you make changes to a contact address that a user added by using the look-up function, Civic Platform updates to the reference contact accordingly.

**Note:**

If you remove a contact address from the current record contact, Civic Platform does not remove the contact address from the source reference contact in the reference contact portlet.

---

### To edit a contact address

1. Click the Contact Address ID link of the contact address that you want to edit.
2. Modify the fields as desired. For a description of the contact address fields, see [Contact Address Fields](#).
3. Click **Save**.

**Note:**

When you make changes to a contact address that a user added by using the look up function, Civic Platform updates to the reference contact accordingly.

---

### To remove or deactivate a contact address

1. Select the contact address that you want to remove or deactivate. Note that you cannot remove or deactivate the primary contact address.
2. Click **Remove** to remove the contact address from the current record contact, or click **Deactivate** to deactivate it first.
  - If you remove a contact address from the current record contact, Civic Platform does not remove the contact address from the source reference contact in the reference contact portlet.
  - If you deactivate a contact address, you can enter an end date for the contact address, which defaults to the current date, and the contact address status becomes Inactive.
  - If the contact address you are deactivating is the primary contact address in one or more records, it requires you to define a new contact address besides specifying the end date for the selected address.

Deactivate Contact Address

Menu ▾
Submit
Validate
Reset
Cancel
Help

You are required to define a new contact address to replace the one being deactivated, because one or more records use it as the primary contact address.

Please confirm the deactivation date (end date) of the address.  
 [Clear](#)

Please define a new contact address below to replace the one serving as the primary contact address in existing records.

<b>Address Line 1</b> <input type="text"/>	<b>Full Address</b> <input type="text"/>	<b>State</b> --Select-- ▾	<b>Unit Type</b> --Select-- ▾
<b>Address Line 2</b> <input type="text"/>	<b>House # Alpha (end)</b> <input type="text"/>	<b>Status</b> Active	<b>Validated</b>
<b>Address Line 3</b> <input type="text"/>	<b>House # Alpha (start)</b> <input type="text"/>	<b>Street # (end)</b> <input type="text"/>	<b>ZIP Code</b> <input type="text"/>
<b>Address Type *</b> Mailing Address	<b>Level # (end)</b> <input type="text"/>	<b>Street # (start)</b> <input type="text"/>	
<b>City</b> <input type="text"/>	<b>Level # (start)</b> <input type="text"/>	<b>Street Name</b> <input type="text"/>	
<b>Contact Address ID</b>	<b>Level Prefix</b> <input type="text"/>	<b>Street Prefix</b> <input type="text"/>	

For information on defining a new contact address, see [Creating a New Reference Address for a Contact](#).

## Setting a Primary Contact

When you have multiple contacts on a record, you can set a primary contact to indicate whom to contact regarding the record.

### To set a primary contact

1. In the Contact list section, identify the contact you want to set as primary, and mark that contact in the **Primary** column as shown below.

Contact \* *(This section is required.)*

New
Search
Delete
Set Primary

2 record(s) added successfully.

<input type="checkbox"/> Contact Number	Primary	Reference Contact ID	Title	First Name	Last Name	Type	E-mail
<input type="checkbox"/>	<input checked="" type="radio"/>	833134		Tony	Chan	Individual ▾	tony.chan@ac...
<input type="checkbox"/>	<input type="radio"/>	833140		Peggy	Huang	Individual ▾	peggy.huang@ac...

2. Click **Set Primary**.

Civic Platform sets the contact as the primary contact for the record.

## Validating a Contact

Depending on your agency administrator's settings for the Contact section, you might need to validate contacts. If the Contact section displays the **Validate** button and the section is not complete, then the validation is a required action before you submit the record.

For the Single Contact or Applicant section, Civic Platform checks if the contact is valid against the reference database. For the Multiple Contact section, Civic Platform not only checks if the contact is valid against the reference database, but also checks if you have added contacts of the required types to the application.

If the contact information entered is not valid against the reference database, you can create a reference contact and add it to the record.

The image below shows an intake form with two Contact sections, the first with a Validate button and the second without a **Validate** button.

The image displays two identical contact form sections. Each section is titled 'Contact (This section is not required.)' and contains a row of buttons: 'Search', 'Validate', 'As Owner', 'As Lic. Prof', and 'As Contact'. The form fields include: Type (dropdown menu), First Name, Middle Name, Last Name, Relationship (dropdown menu), Organization Name, Address Line 1, Address Line 2, City (pre-filled with 'SOUTHLAKE'), State, Zip Code, Phone 1, Phone 2, and Email. In the top screenshot, the 'Validate' button is highlighted with a red rectangular box. In the bottom screenshot, the 'Validate' button is absent, and the 'As Contact' button is highlighted with a red rectangular box.

**Figure 8: Contact Section Validate Button**

### To validate a contact

#### 1. Do any of the following:

- Navigate to the Contact section for entering a single contact and add a contact.
- Navigate to the Contact section for entering multiple contacts and add a contact.
- Navigate to the Contact list section and select the contact you want to validate.

For more information about adding a contact, see [Adding a Contact](#).

#### 2. Click **Validate**.

Civic Platform validates the contact information against the reference database.

- If you looked up the record contact from reference, the validation is always successful. You can jump to step 5.
- If you manually entered the contact information, the validation checks whether there exists close-match reference contact(s) by checking all the common fields, except Contact Type, between the information you entered and the matching reference contact(s).
  - If there is only one matching reference contact, Civic Platform directly adds the reference contact information to the record. You can jump to step 4.
  - If there is none or multiple close match reference contacts, Civic Platform lists all the close match reference contacts for you to select and add as the record contact. You also have the option to create a new reference contact.

Civic Platform displays the Contact List pop-up window, with close match contacts, if any.

The screenshot shows the top portion of a contact list interface. At the top, there is a light blue bar containing a 'Menu' dropdown, and four buttons: 'New', 'Search', 'Cancel', and 'Help'. Below this bar, the column headers for the contact list are displayed in a light blue bar: 'First Name', 'Middle Name', 'Last Name', 'Organization Name', 'Contact Type', 'Type', and 'Home Phone'.

3. In the Contact List pop-up window, do one of the following:

- Select the reference contact that you want to add from the contact list.
- Click **New** to create a new reference contact. After you complete the fields in the popup Contact New Form, click **Submit**. After you see the contact in the contact list, select it to add the contact.

4. If the selected contact(s) has multiple contact addresses, you can pick the contact addresses to add in the pop-up Contact Address Look Up Form by marking the check boxes besides the contact addresses, and clicking **Select**. If you select a contact address and click **Deactivate**, the contact address no longer displays in the Contact Address Look Up Form.

The screenshot shows the 'Contact Address Look Up Form'. At the top, there is a light blue bar with four buttons: 'Select', 'Deactivate', 'Cancel', and 'Help'. Below this bar, there is a 'Select All' checkbox. The main content area is titled 'Contact' and shows the name 'Michael York'. Below the name, it says 'Contact Address'. There is a table with three columns: 'Address Type', 'Recipient', and 'Address'. The table contains two rows: 'Home' and 'Office'. The 'Office' row has a checked checkbox in the 'Address Type' column.

Address Type	Recipient	Address
<input type="checkbox"/> Home	1234 5th Street	San Ramon, CA
<input checked="" type="checkbox"/> Office	1234 5th Street	1234 5th Street, New York

If the selected contact has only one contact address, by default, Civic Platform adds the selected contact to the record with its contact address.

5. Confirm that the contact type of the newly-added contact is correct. If not, select a type in the Type drop-down list.
6. Make necessary changes to the newly-added contact if you want. Depending on your agency's configuration, your changes might also write to the reference source when you submit the record.

## Deleting a Contact

If your agency configures the Contact section as a contact list, you can delete individual contacts from the list before submitting the application.

### To delete a contact

1. Navigate to the Contact list section of the application intake form.
2. Select for each contact you want to delete.
3. Click **Delete**.

Civic Platform deletes the contact from the Contact list.

## Editing a Contact

If your agency configures the Contact section as a contact list, you can view and edit the details for each contact. You can also change the contact type from the Contact list section directly.

### To edit a contact

1. Navigate to the Contact list section of the application intake form.
2. To change the contact type only, select the desired option from the Contact Type drop-down list.
3. To edit contact details, click the contact that you want to edit.  
Civic Platform displays the contact details in the Contact Form pop-up window.
4. Update the fields as needed.  
For a description of the fields, see [Applicant and Contact Fields](#).
5. Add or edit the contact address in the **Contact Address** section.  
For more information on contact addresses, see [Adding Contact Addresses for a Contact](#).
6. Click **Save**.  
Civic Platform saves the changes to the contact.

## Working in the Address Section

Use the Address section of the application intake form to add an address for the primary application contact. There are several methods for adding an address. In most cases, you start with a database search.

### Search the database for an existing address.

1. Enter one or more search criteria in the available address fields, then click **Search**.  
A list of addresses that meet your search criteria displays.

#### Method 1: Select Address(es) and other items

- a. Select each address you want to add and click **Select**.
- b. If your agency administrator sets the parcel, owner, structure, and/or establishment sections to Auto, then data from those associated reference records populates automatically to the application intake form.

Otherwise, a list of the items associated to the address you are adding displays. Select the items you want to add to the record and click **Select**. Do not select any items if you plan to complete needed fields manually.

Civic Platform adds the information to the record.

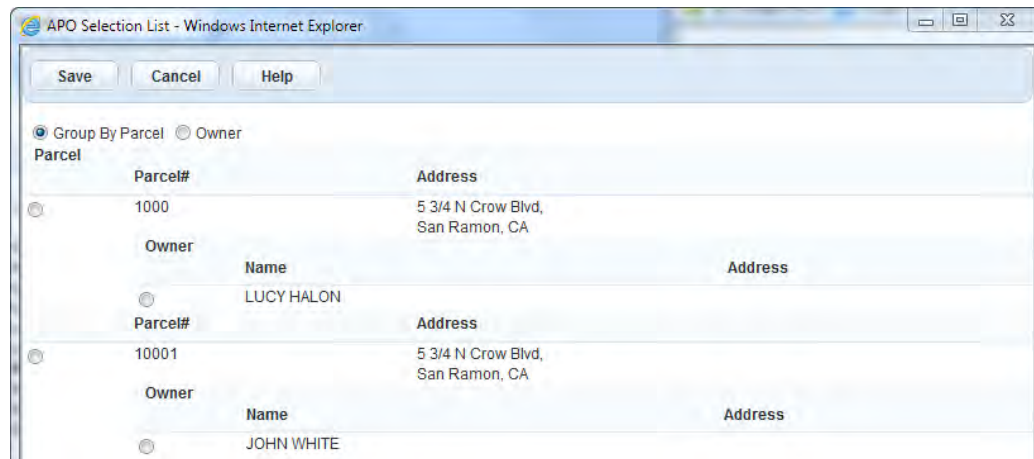


#### Note:

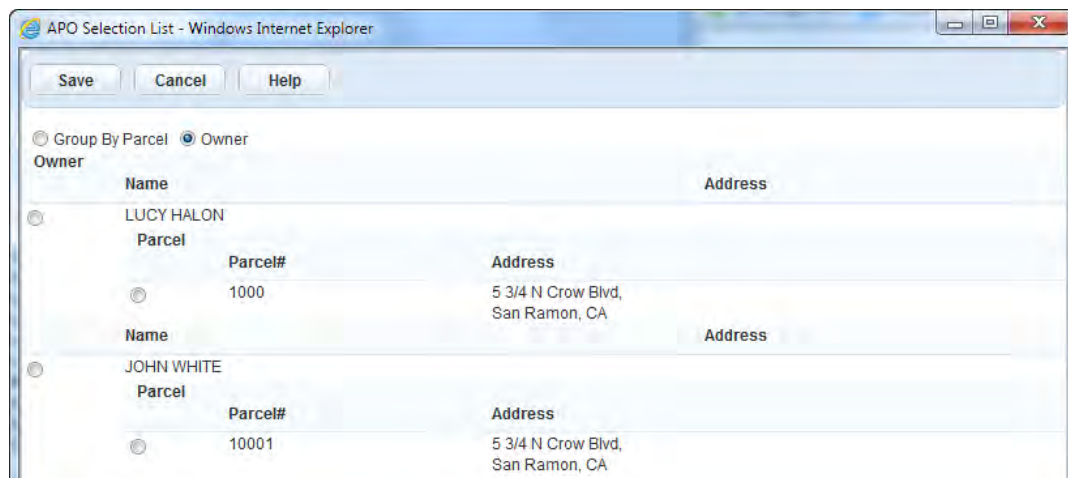
If both parcels and owners populate within the record, you can view them grouped by parcel or by owner by selecting the Group By Parcel or Group By Owner option. See [Related Reference Grouped by Parcel](#) and [Related Reference Grouped by Owner](#) for examples.

---





**Figure 9: Related Reference Grouped by Parcel**



**Figure 10: Related Reference Grouped by Owner**

**Method 2: Get Parcel & Owner button.**

**a. Click Get Parcel & Owner.**

If Civic Platform does not add parcel records or owner records associated to the address record, this button locates and adds associated parcel or owner information.

**Method 3: Add the address manually.**

If you cannot find an address using search, or if you want to enter an address on the application but not in the database, you can add the address manually.

**a. Click New** on the Address Search Results page.

Civic Platform displays the New Address pop-up window.

**b. Manually enter a new address.**

**c. Click Submit.**



**Note:**

Civic Platform does not store the address information that you enter as a reference address. The data exists only in the application that you create.

## Setting a Primary Address

When you have multiple reference addresses on one record, you can set only one primary address on a record.

### To set a primary address

1. In the Address list section, identify the address you want to set as primary, and mark that address in the **Primary** column as shown below.

Address *(This section is not required.)*

Search Delete Get Parcel & Owner Set Primary GIS

2 record(s) added successfully.

<input type="checkbox"/>	Primary	Street # (start)	Direction	Street Name	Street Type	City	State	Zip Code	Address Status
<input checked="" type="checkbox"/>		0		10TH	AVE	SACR...	CA	95818	Enabled
<input type="checkbox"/>		0		10TH AV		SACR...	CA	95818	Enabled

2. Click **Set Primary**.

Civic Platform sets the address as the primary address for the record.



#### Note:

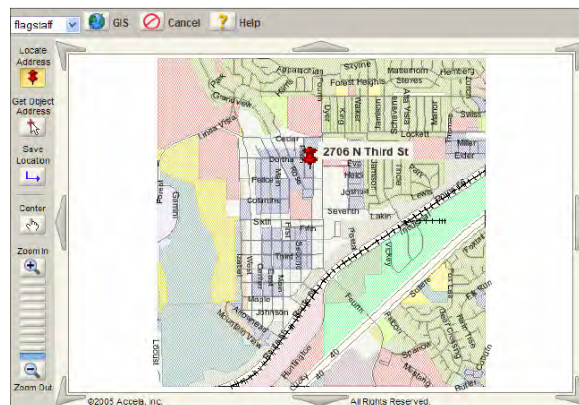
If you do not manually set a primary address on a record, Civic Platform system selects the primary based on the following:

- When you add multiple reference addresses and more than one reference addresses are flagged as primary in the database, Civic Platform selects the last reference address flagged as Primary on Application Intake Form.
- When you add multiple reference addresses and no reference address is primary, Civic Platform selects the first reference address listed on Application Intake Form as the primary address by default on a record.

### Method 4: Use the GIS Address Locator.

You can retrieve only one address at a time using this method.

- a. If your agency uses Accela GIS, click the **Address Locator** button.  
The Address Locator pop-up window displays.
- b. Click **Locate Address** and click an area on the map with the cursor.  
Civic Platform displays a red marker for the address location you selected.



- c. Click **Save Location** to save the address to the application intake form.

**Note:**

For more information about using Accela GIS to add an address to an application, see the Accela Accela GIS documentation

**Method 5: Use Accela GIS to add multiple addresses.**

- a. Open Accela GIS, then click the **GIS** button.  
Civic Platform displays a pop-up GIS viewer.
- b. Select the desired parcels in the GIS viewer and click **Create Record**.
- c. Select one or more addresses from the address list and click **Select**.
- d. Select one or more parcels or owners from the Parcel Owner Selection List and click **Select**.
- e. Choose a primary parcel/owner and click **Submit**.  
Civic Platform adds the selected address, parcel, and owner information to the application intake form.

**Working in the Documents Section**

Use the **Documents** section to attach (upload) documents to an application intake form. For example, an agency administrator might require documents such as building plans and an insurance bond before building a large commercial structure. Such documents can be submitted in electronic format, and attached to the application from the Documents section.

**Working in the Parcel Section**

Use the Parcel section to associate a parcel to an application intake form. There are several ways to associate a parcel. All of the methods start with a database search.

**Search the database for an existing parcel.**

1. Enter one or more search criteria in the available parcel fields, then click **Search**.  
A list of parcels that meet your search criteria displays.

**Method 1: Select Parcel(s) and other items**

- a. Select the parcels you want to add and click **Select**.

**Note:**

Your agency might configure your system to add an associated address, owner, structure, establishment, and/or GIS information in addition to parcel information to the application, either automatically or at your direction.

- b. If your agency administrator sets the address, owner, structure, and/or establishment sections to Auto, then information from any of those reference records associated to the parcel populates automatically to the application.
- c. If your system prompts you to choose an address, owner, structure, and/or establishment to add, a list of the items associated to the parcel you are adding displays in a pop-up window. Select the items you want to add to the record and click **Select**. Leave all items unselected if you plan to complete needed fields manually.  
Civic Platform adds the information to the record.

**Method 2: Get Address & Owner button.**

**a. Click **Get Address & Owner**.**

If your system does not add address and owner records associated to the parcel record either automatically or in response to a system prompt, this button locates and adds associated address and owner information.

**Method 3: Add the address manually.**

If you cannot find an address using search, or if you want to enter an address on the application but not in the database, you can add the address manually.

**a. Click **New** on the Parcel Search Results page.**

Civic Platform displays the New Parcel window, where you can manually enter a new parcel, or you can also try a different search.

**b. Click **Submit** to add the parcel to the application intake form.**



**Note:**

Civic Platform stores the parcel information that you enter in the individual application, and not in the database.

---

**Method 4: Use Accela GIS.**

This feature is useful if you want to add more than one parcel to the application intake form.

**a. Click the **GIS** button.**

For more information on how to add a parcel to an application intake form using Accela GIS, refer to the respective Accela GIS documentation set.

Civic Platform displays a pop-up GIS viewer.

**b. Select the desired parcels in the GIS viewer and click **Create Record**.**

Civic Platform displays a Parcel List window.

**c. Select the parcels you want to add to the record and click **Select**.**

**d. Choose a primary parcel and then click **Submit**.**

The selected address, parcel, and owner information all display on the application intake form.

## Working in the People Section

Use the People section to add licensed professionals or owners to an application intake form. Your agency administrator can configure this section to give you the ability to associate multiple business professionals with an application.

You can add a professional or owner to an application intake form in one of three ways:

### Using the Search button

1. Enter search criteria, then click **Search** to find an existing business professional (architect, building contractor) or owner, or complete the fields to add a new owner. For a list of field descriptions, see [Adding an Owner to a Parcel](#).

Civic Platform displays the People Search form.

- If your agency administrator sets the address, owner, structure, and/or establishment sections to Auto, information from any of those reference records associated to the owner populates automatically to the application intake form.
- If you see a message that asks you to choose an address, owner, structure, and/or establishment to add, a list of the items associated to the owner you are adding displays in a pop-up window. Mark

the check box of each item you want to add to the record and click **Select**. Leave the check boxes blank if you do not want to add associated items, then complete needed fields manually.

### Using the Search P+ button

1. Click the **Search P+** button to add 'PERMITS' Plus owner records to the application intake form.

### Using the GIS button

1. Click the **GIS** button.

For more information on how to use Accela GIS to add a professional or owner to an application, refer to the respective Accela GIS documentation set.

Civic Platform displays a pop-up GIS viewer.

2. Select the desired parcels in the GIS viewer and click **Create Record**.

Civic Platform displays a Parcel List window.

3. Select the parcels you want to add to the record and click **Select**.

4. Choose a primary parcel and then click **Submit**.

The selected address, parcel, and owner information display on the application intake form.

## Working in the Structures or Establishments Section

Use the structures or establishments section to add one or more structures or establishments to the application intake form.



#### Note:

You can only add existing structures or establishments to an application.

---

### To add a structure or establishment to an application

1. In the structures or establishments section, use search to locate the desired structure or establishment.

2. Click **Submit**.

Civic Platform returns a list of structures or establishments that match your search criteria.

3. Select each structure or establishment you want to add to the application intake form.

4. Click **Select**.

5. If there are address, parcel, owner, structure, or establishment records associated to the structure or establishment you selected, one of the following might occur, depending on your agency's settings. Follow the instructions for the outcome you see:

- The associated reference data automatically populates the permit. Proceed to the next step.
- A pop-up window displays the associated reference data. Select which data you want to add to the permit, then click **Select**.  
Civic Platform adds the address and associated reference data to the permit.
- Civic Platform does not add the associated reference data. You must add data manually to the permit.

6. Click **Select**.

The selected structure/establishment information displays in the application form.

## Working in the Application-Specific Information Section

Use the **Application-Specific Information (ASI)** section to add a set of fields specific to a single application.

Some administrators create drill-down ASI fields in the ASI section. Drill-down ASI fields guide users through a series of drop-down lists that present the filtered data choices based on the selections that you made in the previous field. For example, your agency can create a drill-down field for business license applications. The first drill-down lists the nature of the license, such as Agriculture, Bakeries and Confectionery, or Building Materials. If the user selects Building Materials, the next drill-down lists materials such as Paints and Bonding Materials, Tiles and Ceramics, and Wood and Wooden Products. If the user selects Wood and Wooden Products, the third drill-down field might contain options such as Import of Wood, Furniture Repair and Refurbishing, Plywood Manufacture, and Sawdust Collection and Recycling.

Some administrators create attribute mappings between Accela GIS objects and ASI fields. The ASI fields automatically populate with GIS object attribute values according to the attribute mappings, when you attach an asset, parcel, or associated GIS feature to an application as follows:

- Launch the map viewer from the main console or the Record list portlet, select a GIS object that represents an existing asset in the Civic Platform database, and perform the Create New Record, Create Single Work Order, or Create Multiple Work Orders command.
- Look up an existing parcel that you can plot on the map and add it to the Parcel section.
- Launch the map viewer from the Parcel section, select a GIS object that represents an existing parcel in the Civic Platform database, and perform the Send GIS Features command.
- Look up an existing asset that you can plot on the map and add it to the Asset section.
- Launch the map viewer from the Asset section, select a GIS object that represents an existing asset in the Civic Platform database, and perform the Link Object to Work Order command.
- Launch the map viewer from the Associated GIS Features section, select a GIS object that either represents an existing parcel or asset, and perform the Send GIS Features command.



### Note:

If you attach multiple parcels, assets, or associated GIS features to an application at a time, a dialog box prompts you to set one item as primary. The ASI fields get the corresponding values from the attributes of the primary GIS object.

---

## Working in the Application-Specific Information Tables Section

Use the **Application-Specific Information Tables** section to add application-specific information in table format. To make data retrieval easier, Civic Platform provides a table drill down feature as well as a table search feature.

### Topics

- [Application-Specific Information Table Drill-down](#)
- [Searching Application-Specific Information Tables](#)

## Application-Specific Information Table Drill-down

In the Application-Specific **Info Tables** section of the application intake form, you can use the drill-down feature to define the values for the table. Civic Platform guides you through a series of windows that present filtered data choices based on the selections that you make. Civic Platform then populates the data selected in multiple rows on the table.

### To create an ASI Table Drill-down

1. Go to the Application Specific Information Tables section on the application intake form and then click **Add**.

Civic Platform displays the ASI Table Drilldown selection pop-up window.

2. Select a value and click **Next**.



**Note:**

If your administrator has enabled multiple selection, hold down the **Ctrl** button on your keyboard and select the desired values, then click **Next**.

3. Repeat the previous steps for each selection screen. The last screen has a Finish button instead of a Next button. Click **Finish** to complete the process.

Civic Platform displays the application-specific information table on the application intake form.



**Note:**

If the agency administrator configures the option, you can sort an ASI table column by ascending or descending order. Civic Platform remembers your sorting preferences for future use.

To add another row to the ASI table, click **Add** and complete the drill-down steps again to include the new element.

To delete a row from the table, select the row and click **Delete**.

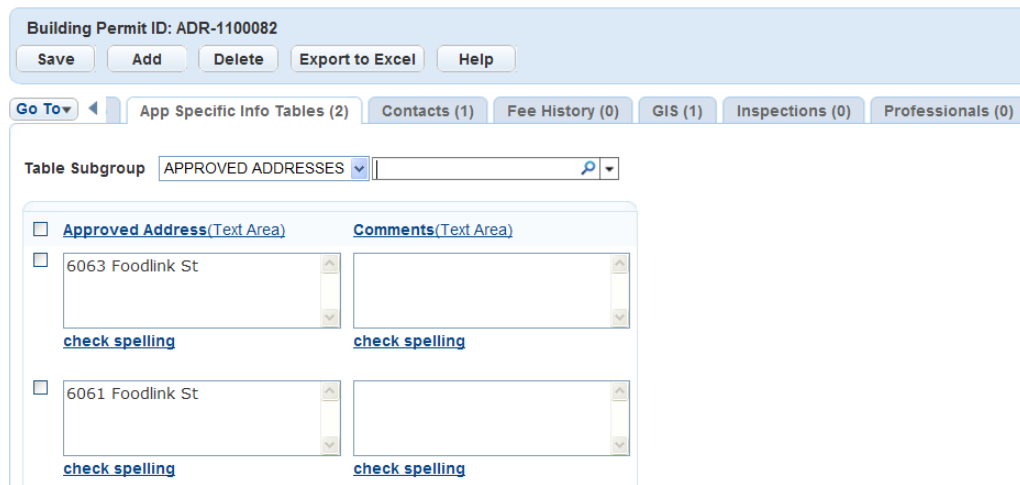
## Searching Application-Specific Information Tables

You can search for records using application-specific information table data values as search criteria: App Specific Info Table Label and Appl Specific Info Table Value. These fields are available on the ASI table search page even if you do not select a Record Type.

### To search by application-specific criteria with no record type selected

1. Navigate to the Building portlet and click **Search**.  
Civic Platform displays the Record search form.
2. Enter a valid value in the **App Specific Info Table Label** field to identify the table label you are searching on.
3. Enter a valid value in the **App Specific Info Table Value** field to identify the record.  
Civic Platform displays the search results.

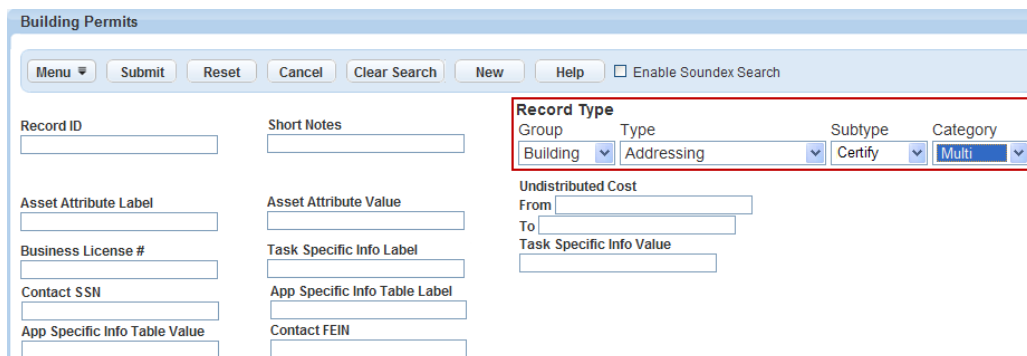
4. Click the Record ID link for the record you want to view.  
Civic Platform displays the Record Details Portlet
5. Select the App Specific Info Tables tab.  
Civic Platform displays the list of ASI Tables for the selected record.



6. Use the search box located to the right of the Table Subgroup drop-down to search the ASI table data.  
See [Searching for Application-Specific Table Data from Results List](#) for more information.

**To search application-specific information with a record type selected**

1. Navigate to the portlet you are working with and click **Search**.  
Civic Platform displays the Record Search form
2. Select a Record type from the drop-down, then select a Type, a Subtype, and a Category from the drop-down lists that appear in sequence.  
Civic Platform displays the Searchable ASIT fields.



**Note:**

Only the Name and Business fields display, because those are the only two fields with Searchable selected in the configuration.

3. Enter search criteria as appropriate.  
Civic Platform displays the search results.
4. Click the Record ID link for the record you want to view.  
Civic Platform displays the Record Details Portlet



5. Select the App Specific Info Tables tab.

Civic Platform displays the list of ASI Tables for the specific record

6. Use the search box located to the right of the Table Subgroup drop-down to search the ASI table data. See [Searching for Application-Specific Table Data from Results List](#) for details.

## Searching for Application-Specific Table Data from Results List

Use the search box to the right of the **Table Subgroup** drop-down to search ASI table data. By default, the ASI table data search features searches all columns within the ASI tables.

The screenshot shows a web interface for a Building Permit (ID: 13CAP-00000873). At the top, there are buttons for Save, Add, Delete, Export to Excel, and Help. Below this is a navigation bar with tabs: Go To, Summary, Record Info, Attachments (0), Address (0), Addtl Info, Edit group 1, and App Specific Info Tables (3). The 'App Specific Info Tables' tab is active. Under this tab, there is a 'Table Subgroup' dropdown set to 'ASIT SUB01' and a search box containing 'Truck'. Below the search box is a table with three columns: THow (Text), TWhen, and TComment (Text Area). The first row of the table has 'Truck' in the THow column, '09:30' in the TWhen column, and 'AM' in a dropdown menu. The 'Truck' text is highlighted in yellow. The TComment column contains a text area with the placeholder text 'please input here' and a 'check spelling' link below it.

**Figure 11: ASI Table Data Search Results Indicated with Yellow Highlight**

### To use the ASI table data search feature

1. If desired, apply a quick filter:
  - a. Click the down-arrow to the right of the search button (magnifying glass). Civic Platform displays the quick filter list of searchable columns
  - b. Select one or more columns to search.
2. Enter a search string into the Search field to the right of the Table Subgroup box.
3. Click **Search**. Civic Platform displays the search results (filtered by the selected columns, if applicable).

### ASI Table Data Search Additional Usability Features

If ten or more ASI tables display within the ASI table section, then **Add Row** and **Delete Selected** links display at the bottom of the list. Use the links to add or delete ASI table rows as needed. If you add or delete rows, a **Save** button appears at the bottom of the window. Use it to save your changes.

Building Permit ID: ADR-1200038

Save Add Delete Export to Excel Help

Go To Summary Record Info Attachments (0) App Specific Info Tables (2)

Table Subgroup APPROVED ADDRESSES Filter table

Approved Address(Text Area)	Comments(Text Area)
<input type="checkbox"/> 2424 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2425 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2426 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2427 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2428 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2429 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2430 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2431 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2432 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>
<input type="checkbox"/> 2433 19th St <a href="#">check spelling</a>	<input type="text"/> <a href="#">check spelling</a>

Save Add row Delete Selected

**Figure 12: Add Row and Delete Selected links at the Bottom of the ASI Table List**

## Working in the Education Section

The education section is often available on application intake forms for a professional or occupational license. You can enter an applicant's educational credentials now, or you can select educational credential from the applicant's reference contact file.



### Note:

For additional information about using education information in connection with professional or occupational licenses, see [Education and Examination Providers](#).

### To add education information to an application

1. Click **Add** in the Education section to insert a new data line (if a predefined line exists).
2. Select the educational institution attended from the **Provider Name** drop-down list. Civic Platform automatically populates the Provider Number field.

- Click the arrow next to the Provider Name to expand the section. Review, add, or modify provider information as needed.
- Complete the rest of the fields with available data. Fields marked with a red asterisk require data entry.

**Note:**

In Years Attended, you can enter a single year (2009), a range of years (2009-2011), or a combination of both (2006, 2009-2011).

When you submit the application, Civic Platform adds the data you just entered to the license record, where you can view or edit it on the Education tab. For more information about working with education data on the License portlet, see [Education and Examination Providers](#).

## Working in the Continuing Education Section

The continuing education section is often available on the application intake form for a professional or occupational license. Use it to enter information about an applicant's ongoing professional development or continuing education credentials earned toward recertification.

You can enter an applicant's continuing education credentials manually, or you can select continuing education credentials from the applicant's reference contact file. See [Education and Examination Providers](#) for information.

Some applications have a continuing education requirement. Civic Platform lists the required number of educational hours (units) at the top of the section. Expand the total hours to display a table that lists the hours required, hours completed, and the balance due. As you enter hours into the lines below, the figures listed in the table automatically recalculate.

**Continuing Education** (This section is not required.)

▶ Total Hours: 0

<input type="checkbox"/>	Continuing Education Name	Required/Optional	Provider Name	Provider Number	Class *	Date of Class	Hours Completed
<input type="checkbox"/>	Chinese1	Required					
<input type="checkbox"/>	Math1	Required					
<input type="checkbox"/>	ENGLISH2	Required					

For additional information about using continuing education information in connection with professional or occupational licenses, see [Education and Examination Providers](#).

### To add continuing education information to an application

- In the Continuing Education section, click **Add** to insert a new data line.
- Make selections from the **Continuing Education Name** and **Provider Name** drop-down lists. Civic Platform automatically populates the Provider Number field.
- You can click the arrow next to the provider name to expand the section, where you can review, add, or modify provider information, as needed.
- Populate the remaining fields with available data.

When you submit the application, Civic Platform adds the data you enter in this section to the license record, where users can view it on the Continuing Education tab. See for more information.

## Working in the Examination Section

The examination section is often available on application intake forms. Use this section to enter details about certification-level examinations that the applicant takes. You can enter an applicant's examination

information now, or you can select examination information from the applicant's reference contact file. See [Selecting Examination or Education Records for an Application](#) for information.

Depending on your agency's agreement with external providers, the provider might maintain the exam data within Civic Platform or on an external system and integrate the data with Civic Platform by means of a URL link. Consult with your agency administrator for the specific information that you need to provide to examination providers who choose to use the second option.

For additional information, see Chapter 18: Certifications and Education, in the *Civic Platform Citizen Access Administration Guide* and [Modifying Educational Credentials](#)

### To add examination information to an application

1. In the Examination section, click **Add** to insert a new data line.

2. Select the **Examination Name** from the drop-down list.

Civic Platform displays a Schedule link next to the Examination Date field, which provides all available schedule options from one or more providers.

You can click the arrow next to the Provider Name to display the Examination Site section. The fields auto-populate after you select a schedule.

3. Populate the remaining fields using one of the following methods:

- Manually enter values.

Civic Platform does not display the application as a registered record in the associated provider (Licensed Professional record). You cannot update manually entered data by uploading a CSV file or by connecting to an external system. You must update this data manually.

- Select an examination session to populate the fields.

Civic Platform displays the application as a registered record in the associated provider (Licensed Professional) portlet. You can update the exam data by uploading a CSV file or by connecting to an external system, depending on your agency's agreements with the provider of certification-level examinations.

1. Click the **Schedule** link next to the **Examination Date** field.

Civic Platform displays a list of available exam sessions for the selected provider.

2. Select an option from the list.

To narrow down the options and better locate the option you want, you can apply a filter.

3. Click **Next**.

Civic Platform displays the scheduling details for your confirmation.

4. Specify a registered Citizen Access user account if you are scheduling an online examination.



**Note:**

You can use the same registered Citizen Access user account to schedule online examinations from different examination providers.

---

5. Click **Finish**.

Civic Platform populates the values of the selected exam session to the schedule line.

4. Click **Submit**.

Civic Platform saves the newly added examination schedules.

## Estimating Fees

You can calculate an estimate of costs payable to the agency by partially completing an application. If you save your settings, you can search for the partial application later so that you can work with it again. To help identify partial application records with estimated fees, Civic Platform includes the designation “EST” in the application name.

### To estimate fees

1. Follow steps 1-6 to submit a new application (see [Creating a Record](#)).
2. Click **Estimate Fee**.



#### Note:

If you selected the “Create one Record for each Parcel” option, Civic Platform disables the **Estimate Fee** and **Manual Input ALT ID** buttons.

Civic Platform displays the fee calculator pop-up portlet.

Building Permit ID: 13TMP-001366

Menu ▾ Add Delete ReCalc Cancel Help

Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$20.00

<input type="checkbox"/> <a href="#">Payment Period</a>	<a href="#">Subgroup</a>	<a href="#">Fee Code</a>	<a href="#">Fee Item</a>	<a href="#">Date Assessed</a>	<a href="#">Quantity</a>	<a href="#">Unit</a>	<a href="#">Fees</a>
<input type="checkbox"/> FINAL		EXAM FEE	<a href="#">Exam Fee</a>	01/21/2013	2		\$20.00

3. Do one of the following:

- **To add a fee item:**

1. Click **Add**.
2. Enter the quantity of each fee item that you want to add.
3. To restore the default quantities and clear the note boxes, click **Reset**.
4. Click **Submit**.

- **To edit a fee item:**

1. Click the Fee Item link for the item that you want to change.
2. Make changes as needed.
3. Click **Submit**.

- **To delete a fee item:**

1. Select the item that you want to delete.
2. Click **Delete**.

- **To edit a related condition:**

1. Click the name of the condition that you want to edit.
2. Make changes as needed.
3. Click **Submit**.

4. When you finish viewing the estimated fees, click **Cancel**.  
Because the fees are only an estimate, you do not need to save them.  
Civic Platform returns to the partial application in progress.

5. Click **Save without Submit**.  
Civic Platform saves the partially completed application for submittal at a later time.

## Transferring Accela GIS Data to an Application

Civic Platform can auto-populate application-specific information into an application form using Accela GIS (Geographic Information System).



### Note:

Your agency administrator identifies application-specific information about each GIS object and layer.  
For more information on how to transfer Accela GIS data to an application, refer to the Accela GIS documentation set.

## To auto-populate permit-specific information by using Accela GIS

1. Follow steps 1-4 to submit a new record (see [Creating a Record](#)).
2. Complete the form fields with available data. When you come to the Address, Parcel, or Owner section, click the **GIS** button or the **Address Locator** button.  
Civic Platform displays the Accela GIS map viewer.
3. Select each GIS object you want to reference. Mark **Select All Objects** if you plan to associate all the objects.
4. From the drop-down list, select **Send Features to AA**.
5. Click **Submit**.  
Accela GIS sends data for the selected objects to Civic Platform. If you select more than one GIS object, Civic Platform displays a 'Choose Primary Object' dialog box.
6. If prompted, choose the object you want to select as the primary object.  
Information from the primary object auto-populates to the appropriate fields on the application intake form. The object becomes the primary parcel for the application, while all other selected GIS objects become associated with the application.
7. Click **Submit**.  
Civic Platform displays the Default Inspection Type pop-up window.
8. Select the inspections you want to schedule (see [Select the inspection\(s\) you want to schedule](#) of the [Creating a Record](#) section).
9. Click **Submit**.  
Civic Platform generates the Record ID, updates the list of applications, and schedules the selected inspection types.

## Deleting Records

---

When you delete a record, you also delete all information dependent on the record. However, if you entered associated information separately from the record, you only delete the association when you delete the record - not the information. For example, if the user deletes a child record to another record, the parent record information remains intact, minus the deleted child record information.

To view a list of deleted records, click the **View Log** button and select **Delete Record Log** from the pop-up menu.

You can delete records that you already submitted successfully to the database, or delete partially-completed records.

### To delete a submitted record

1. Navigate to the Building Permit portlet and locate the record you want to work with.  
Civic Platform displays the application list portlet.
2. Select the record(s) you want to delete.
3. Click **Delete**.  
Civic Platform prompts you to confirm the deletion.
4. Click **OK**.  
Civic Platform removes the record from the list.

### To delete a partial record

1. Navigate to the Record portlet.
2. Locate the partial record you want to delete and click the record hyperlink.  
Civic Platform displays the application intake form for the partial record.
3. Click **Delete**.  
Civic Platform prompts the "Are you sure you want to delete this record?" message.
4. Click **OK** to confirm the deletion, or click **Cancel** to return to the Edit Partial Records by Single window.

## Managing Record Comments

Your agency administrator can create a set of standard comments you can select from when completing applications, inspections, workflows, and checklists. When you assign a set of standard comments to a record type, inspection, workflow, or checklist, you can choose from a list of pre-written comments to populate the Comments field. This feature streamlines the form completion and improves data consistency.

Contact your agency administrator for information on which forms have standard comments assigned to them, or to suggest standard comments for a particular form.

Besides standard comments, you can add your own comments to an application.

### Topics

- [Adding a Comment to a Record](#)
- [Viewing or Editing a Record Comment](#)

### Adding a Comment to a Record

When you add comments to a record, keep in mind that you cannot delete them after you submit them.

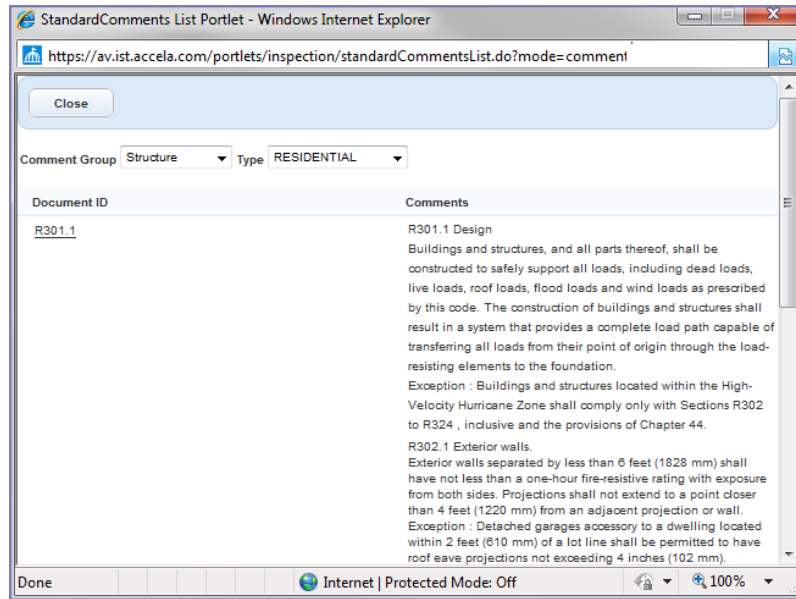
#### To add a comment to a record

1. Navigate to the desired portlet, then locate and open the record you want to work with. See [Using the Search Features](#) for information on using search to locate a record.  
Civic Platform displays the record detail portlet.
2. Click the Comments tab.  
Civic Platform displays the Comments list portlet.
3. Click **New**.  
Civic Platform displays the New Comment page.

The screenshot displays the 'New Comment' interface. At the top, there is a navigation bar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below this is a breadcrumb trail starting with 'Go To' and followed by several categories with zero counts: 'rts', 'Comments (0)', 'Conditions (0)', 'Contacts (0)', 'Continuing Education (0)', 'Distribution History (0)', 'Documents (0)', 'Education (0)', and 'Evil'. The main content area features a 'Comment' field with a 'Standard Comment' hyperlink and a data picker icon. To the right of the field is a checkbox labeled 'Apply to Inspections'. Below the field is a 'check spelling' link.

4. To enter a standard comment, do the following:
  - a. Either click the **Standard Comment** hyperlink or the data picker next to the Comment field.  
Civic Platform displays a Standard Comments pop-up window.





- b. Select the type of standard comment you want from the **Type** drop-down menu.  
Each Standard Comments Type contains several relevant comments you can choose from. Consult your agency administrator if you have questions about Standard Comments types.  
Civic Platform displays the Standard Comments associated with the Standard Comments Type you have selected.
  - c. Click the hyperlinked name of the Standard Comment you want to use.
  - d. Click **Close**.  
Civic Platform populates the Comments field with the Standard Comment you have chosen.
5. Enter your own comment in the **Comment** field or modify the standard comment that you added in step 4.
  6. Select the **Apply to Inspections** option to display the comment in the **Record Comments** field of inspections associated with the record.
  7. Click **Submit**.  
Civic Platform displays the comment list portlet with the new comment added.  
Civic Platform also displays the newly-added comment in the Record Comments field of associated inspections if “Apply to Inspections” = Yes.

Building Permit ID: 11CAP-00000624

Menu ▾ Save Reset Cancel View Log ▾ Help

Inspection Detail Guide Sheet Conditions (0) Documents (0) Related Inspections

This form is for RESULTING inspections only. You cannot reassign or reschedule from this screen.

Status: A - Approved/Accepted ▾ Request Date: 12/27/2011 Inspector \*: Admin Admin  Overtime

Department: Accela Administration Inspection Date: 12/27/2011  Display in ACA

Scheduled Date \*: 12/27/2011

Result Comment [Standard Comment](#)

**Record Comments**  
This has been submitted to Accela as an enhancement request [Edit](#)  
[Remove](#)

## Viewing or Editing a Record Comment

You can view any comments added to a record from the Comments secondary tab on the Record detail portlet.

### To view comments or edit comments

1. Navigate to the desired portlet, then locate and open the record you want to work with. See [Using the Search Features](#) for information on using search to locate a record.  
Civic Platform displays the record detail portlet.
2. Click the Comments tab.  
Civic Platform displays the Comments list portlet.
3. Click the link in the Comments column for the comment you want to view.  
The full comment text displays.
4. If you are modifying the comment, make changes as needed and click **Submit**. See [Adding a Comment to a Record](#) for information about selecting a standard comment.  
Civic Platform saves the modifications.

### To remove the Comments field from an associated inspection display

1. With the associated inspection displayed, click **Remove** for each comment you do not want.
2. Click **Save**.  
The Apply to Inspections setting for the comment changes to No.

### To edit the Comments field from an associated inspection display

1. With the associated inspection displayed, click the **Edit** button for the comment you want to modify.
2. Edit the comment in the pop-up window as needed.
3. Click **Save**.  
Civic Platform updates the comment in the Comments tab for both the record and for the Record Comments field in associated inspections.

## Adding Documents to a Record

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You can add documents or graphics to a record at any time from either the Documents tab or from the Inspection portlet. When added from the Inspection portlet, new documents also display in the Documents tab for the record. You can determine the origin of a document by looking at the value in the Entity Type column.

For more information about uploading and accessing documents, see [Attachments](#) .

## Assigning Inspection Districts to a Record

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If a record requires inspection, you can associate an inspection district (or more in rare cases) with the record address or parcel. Later when you schedule inspections for the record, Civic Platform gets the inspection district information in the record. Civic Platform then checks the settings in the inspection calendar for the inspection district to determine which dates and times are available.

### To associate inspection districts with a record

1. Locate and open the record you want to work with. See [Using the Search Features](#) for information on using search to locate a record.  
Civic Platform displays the record detail portlet.
2. Click the Address or Parcel tab.  
Civic Platform displays the Address or Parcel list portlet.
3. Click the link in the list for the address or parcel you want to view.  
Civic Platform displays the Address Detail tab (or Parcel Detail tab) and a District tab.
4. Click **District**.
5. Click **Search**.  
Civic Platform displays all the inspection district options.
6. Select each district that you want to assign to the record.
7. Click **Submit**.

Civic Platform returns to the District list, with the new districts added for the record.

## Viewing Record Information

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You can view all the data related to a record and edit some data as needed.

### Topics

- [Viewing or Editing Record Details](#)
- [Viewing Additional Information about Records](#)

### Viewing or Editing Record Details

You can quickly access a list of records you are currently responsible for maintaining, as well as view the details of the current record in the detail portlet below.

#### To view record details

1. Navigate to the portlet you want to work in; for example, the Service Request portlet.  
Civic Platform displays the list portlet.
2. Use Search and QuickQuery to filter the record display. See [Understanding QuickQueries](#) for information about using QuickQueries. See [Using the Search Features](#) for information about using the Search tool.
3. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
4. Select from the available tabs in the detail portlet to view record details.
5. To edit record details, update the fields that display on the selected tab.
6. Click **Submit**.

### Viewing Additional Information about Records

When working with records, you have additional data you can refer to as needed.

### Viewing or Editing a Record Summary

You can view a summary of record details and you can edit them as needed.

#### To view or edit a record summary

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Record tab.
4. Click **Summary**.  
Civic Platform displays the record summary portlet.
5. Edit the data as needed.
  - See [Application Record Fields](#) for field definitions.

- If you are working with contacts, see [Contacts](#) for more information.
- If you are working with parcels, see [Managing Parcels](#) for more information.
- If you are working with owners, see [Managing Owners](#) for more information.

6. Click **Submit**.

## Viewing Record Status History

A status history is available for your reference. It is essentially a record of all the statuses for a record. For example, you can see why it took so long to approve a particular application. You can also answer a citizen's question about why your agency did not approve his permit.

### To view a status history

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Status History tab.  
Civic Platform displays the Status History list portlet.
4. Click the link of any item in the list that you want to view.  
Civic Platform displays the detail portlet.

## Working with Status History

---

Status history entries record the progress of a record through its workflow process. Historical entries differ from the existing status entry.

You can edit the status history, including the date, status, comments, and related staff member information, to correct errors and ensure the accuracy of status entries. This is useful if you plan to clone a record, re-open a record to resolve pending issues, or re-assign a record to a different person at your agency.

Contact your agency administrator to set the related Function Identification for this feature.

### Topics

- [Editing or Deleting a Status History Record](#)
- [Viewing the Status History Log](#)

### Editing or Deleting a Status History Record

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Status History tab.  
Civic Platform displays the Status History page.
4. **To edit a status history record:**
  - a. Click the Status link for the status history record you want to view.  
Civic Platform displays the Edit Status History page.
  - b. Edit the data as needed.
  - c. Click **Save**.  
If you modify the most recent status history entry, a message displays indicating that modifications to the most recent status history entry result in a discrepancy with the existing application status.
  - d. Click **OK** to modify the most recent status history record. This action does not affect the existing record status. Previously created status history entries are still available for view on the Status History page.

#### **To delete a status history record:**

- a. Select each status history record you want to delete.
- b. Click **Delete**.  
If you delete the most recent status history entry, a message displays indicating that deleting the most recent status history entry results in a discrepancy with the existing status.
- c. Click **OK** to delete the most recent status history record. This action does not affect the existing status. Previously created status history entries are still available for view on the Status History page.

## Viewing the Status History Log

Access the Status History Log to view all the status history modifications.

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Status History tab.  
Civic Platform displays the Status History page.
4. Click **View Log**.  
Civic Platform displays the Status History log for the selected record.

Building Permit ID: 13CAP-00000873							
Menu ▾		Close					
Log Date		01/15/2013		--		01/21/2013	
<a href="#">Log Date</a>		<a href="#">Log Action</a>		<a href="#">Operator</a>		<a href="#">Status History Number</a>	
<a href="#">Action By Department</a>		<a href="#">Action By</a>		<a href="#">Status</a>		<a href="#">Status Date</a>	
01/21/2013 07:30:42	Update	Andrew Ottavio	8922912	CDD-Administration	Admin User	Active	01/21/2013



## Printing an Application

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When you complete the application process and you are ready to issue the permit, you can to print the permit. When you view PDF files, some browsers give you the option to save the permit PDF to your hard drive or send it as an email attachment.

**Note:**

You must have Adobe Acrobat or Acrobat Reader installed to view and print. Civic Platform generates printable permits, licenses, applications, and service requests in PDF (Portable Document Format).

---

**To print a permit**

1. Navigate to the Building Permit portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Choose **Print** from the menu.  
Civic Platform generates a PDF version of the permit and displays it in a new window.
4. Use your browser's print option to print the permit.

## Viewing the Summary page

Users can view a customized Summary page as needed. Each section of the summary addresses an application area. Sections include a brief summary, field information, and a hyperlink that takes you to the associated area portlets in Civic Platform.

For a list of all the areas that you can configure to display on the Summary page, see [Record Summary Page Selections](#).

The Summary is distinct from the Record Summary. The former is a read-only summary of the record with links to relevant portlets. The latter is an editable version of the application intake form. For information on working with the Record Summary, see [Viewing or Editing a Record Summary](#).

Access the Record Summary portlet using the Menu Navigation (Go-to) drop-down list or by clicking the Summary tab.

### To view the Summary page

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Summary tab in the detail portlet.  
Civic Platform displays the record summary on the Summary page.

Building Permit ID: 13CAP-0000644

Menu Reports Help

Go To Summary Record Info Attachments (0) Address (2) Addtl Info App Sp

Application Detail: [Detail](#)

Application Type: [Building/linda/linda13/linda01](#)

Address: [10086 A - 10087 A N Smith WALK N LVL# 001 - 002, wuhan, CO 4645645](#)

Owner Name: [1001 K ST WEST CONDOMINIUMS ASSN](#)

Owner Address: [PO BOX 3686, NAPA, CA 94558](#)

Application Name: [Test](#)

File Date: [02/17/2013](#)

Application Status: [Active](#)

4. Click any hyperlink to go to the associated area in Civic Platform.



#### Note:

Depending on administrator configuration, you might not be able to view all the different areas related to the selected record.

## Viewing Inspections on the Summary Page

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If configured, you can view pending, scheduled, and completed inspections for a record in the Inspections section on the Summary page.

### To view inspections on the Summary page

1. Navigate to the portlet you want to work in; for example, the Building portlet.  
Civic Platform displays the list portlet.
2. Locate the record you want to view and click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Click the Summary tab.  
Civic Platform displays the Summary page.
4. Navigate to the Inspections section.  
Civic Platform displays the Inspections section on the Summary page.
5. Click the link to any pending, scheduled, or completed inspection to view the inspection detail.

## Assigning a Record

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You can assign one or more records to an individual staff member or to a department. When you assign a record, the assignee becomes responsible for that record.

There are two approaches to assigning a record.

- You can assign a one or more records to any department or individual on your system, or
- You can compare a list of departments and staff members, examine their experience and workload, and then choose the best candidate for a single record.

### Topics

- [Making General Assignments](#)
- [Making Specialized Assignments](#)

### Making General Assignments

When you make a general assignment, you can choose any department or any staff member. You can also assign multiple records at the same time, which is useful when you want to assign a large number of records and you do not need to consider the experience and workload of the assignee.

#### To make a general assignment

1. Navigate to the portlet you are working in, and use Search to locate the record(s) you want to work with.
2. Select each record you want to assign.
3. Hover the mouse over the **Menu** button to display the command menu, then choose **Assign**.  
Civic Platform displays an assignment form.
4. If you are assigning the record to yourself:
  - a. Click the **Current User** link.  
Civic Platform updates both the **Assigned to Staff** and the **Assigned to Department** fields with your name and department.
  - b. Skip to [Click Submit](#).
5. If you are not assigning the record to yourself:
  - a. Select the responsible department from the **Assigned to Department** drop-down list.  
Civic Platform populates the Assigned to Staff drop-down list with the selected department staff names.
  - b. Select the responsible individual within the selected department from the **Assigned To Staff** drop-down list.
6. Click **Submit**.  
Civic Platform updates the record.

### Making Specialized Assignments

Civic Platform enables you to choose the most qualified assignee by presenting you with a listing of staff that includes data about the skillsets and workloads of each candidate. Use this list to examine and compare staff skills and staff workloads, then use your observations to select the best person for the job.

**Note:**

See the Assignments, Skillsets, and Workloads chapter in the Civic Platform Administrator Guide to learn about setting up skillsets and workloads.

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**To associate workloads and skillsets**

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
Civic Platform displays the list portlet.
2. Click the record hyperlink.  
Civic Platform displays the detail portlet below the list portlet.
3. Hover the mouse over the **Menu** button in the detail portlet to display the command menu, then choose **Assign**.  
Civic Platform displays a list of eligible departments and eligible staff members.
4. Select the staff member most qualified to accept the new assignment.
5. Click **Submit**.  
Civic Platform assigns the record to the staff member that you chose and updates the record details.

## Creating a Set from the Record List Portlet

You can create a set directly from the record list portlet by leveraging the QuickQuery and Search options that you have available in the portlet to locate the records you want to include in a new set.

### To create a set from the Record list portlet

1. Navigate to the Record list portlet.
2. Either use the portlet Search functionality or invoke a QuickQuery to locate the records you want to include in your new set.
3. Do one of the following:
  - To create a set from all of the records listed in the list portlet:
    1. Click **Create a Set > Select All and Create a Set**.
  - To create a set from manually selected records in the list portlet:
    1. Select the records that you want to include in the new set.
    2. Click **Create a Set > Create a Set**.

Civic Platform displays the New Set form.

4. Complete the fields with available data.

<b>Set ID</b>	Civic Platform automatically generates a default code for the Set ID. If you want to change the set ID, enter an alphanumeric code. For example, enter “EDP.” After you save a new set, you cannot change the Set ID.
<b>Set Name</b>	Enter a name to identify this set. Civic Platform permits duplicate set names.
<b>Comments</b>	Enter commentary as needed. For example, you can summarize the purpose for creating the set.
<b>Set Type</b>	Select a set type from the drop-down list. The set type defines who has permissions to work with a set, what scripts are available for the set, and which values for Set Status are available.
<b>Set Status</b>	Select a status describing the set from the drop-down list. The available status options vary, depending on set type.
<b>Set Status Comments</b>	Enter commentary about the set status as needed.

5. Click **Submit**.

Civic Platform saves the new set.

## Closing a Record

When you complete the records such as finish the tasks or work orders, or appraise the record is unworthy of tracking, you can close the record where you record the responsible party, status, closed date and detailed description.

### To close a record

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. Civic Platform displays the list portlet.
2. Select the record.
3. Hover your mouse over the **Menu** button in the record list portlet to display the drop-down menu, then choose **Close**.

Civic Platform displays the close record window.

The screenshot shows a 'Record' window with the following fields and values:

- Record ID:** 12CAP-00001914
- Closed by Department:** Current Department
- Closed by Staff:** Current User
- Status:** Closed
- Closed Date:** 12/04/2012
- Detailed Description:** (Empty text area)
- check spelling:** (Link)

4. Complete the fields with available data, then click **Save**. For a description of the fields, see [Application Record Fields](#).

Civic Platform closes the record.

# Managing Alerts

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You might receive alerts about records you are working with. You can view alert details and delete alerts after you no longer need them.

## Topics

- [Viewing Record Details from an Alert](#)
- [Deleting an Alert](#)

## Viewing Record Details from an Alert

If you receive an alert, you can view the details about that alert and about the associated record as needed.



### Note:

Not all alerts have an associated record.

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## To view record details from an alert

1. In the Alerts portlet, click the record link you want to view.  
Civic Platform displays the record details.
2. Review the information that displays.

## Deleting an Alert

If you no longer need to view an alert, you can delete it.

### To delete an alert

1. Navigate to the Alerts portlet.
2. Select the alert(s) you want to delete.
3. Click **Delete**.  
Civic Platform deletes the alert from the Alerts portlet.



## Running a Report from a Record

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Your agency can configure your system to enable users to run, email, or print reports from the Record portlet. For more information about running reports and about reporting in Civic Platform, see any of the topics listed below.

- [Accessing and Running a Report via a List Portlet](#)
- [Sending a Report by Email](#)

## Managing Application Record Hearing Agendas

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Many agencies hold public hearings to examine proposed work. The agency administrator can set up Civic Platform to incorporate hearing schedules and allocate the resources and location for a hearing. After you schedule a hearing, you can define the hearing agenda by associating application records with that hearing.

A Hearings standard report is available for you to print. This report provides the hearing date, time, location, and reason. You can filter the report by date range and then print it in a calendar format or list format.

### Topics

- [Adding an Application Record to a Hearing Agenda](#)
- [Removing an Application Record from a Hearing Agenda](#)

### Adding an Application Record to a Hearing Agenda

After you submit an application, the work proposed in the application, such as building plans for a subdivision, might need a hearing body such as a community council to review it. You can associate an application record with a hearing to add review of the current application to the hearing agenda.

#### To add an application to a hearing agenda

1. Use Search to locate and select the record you want to associate with a hearing agenda.  
Civic Platform displays the Record detail portlet.
2. Click the Hearings tab.  
Civic Platform displays the Hearing Summary page.
3. Click **Schedule**.  
Civic Platform displays the Hearing Search page.
4. Enter search criteria as needed to locate the desired hearing.
5. Click **Submit**.  
Civic Platform displays the scheduled hearings that match your search criteria.
6. Select the hearing(s) that you want to associate with the record.
7. Select a hearing reason from the **Reason** drop-down list.  
Civic Platform displays the comments associated with the hearing reason in the Comments field.
8. Click **Submit**.  
Civic Platform adds the selected record to the hearing.

### Removing an Application Record from a Hearing Agenda

1. In the portlet you are working in, use Search to locate and select the record you are removing from a hearing agenda.  
Civic Platform displays the Record detail portlet.
2. Click the Hearings tab.  
Civic Platform displays the Hearing Summary page.
3. Select the hearing you want to remove.

**4. Click Delete.**

Civic Platform removes the association between the application and the hearing.

## Working with Associated PERMITS Plus APDs

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If your agency uses the PERMITS Plus permitting system, your administrator can configure some list portlets so that users can associate PERMITS Plus APDs to a Civic Platform record. This association allows users to view and search for associated APDs from the Civic Platform Licenses module or to click the PERMITS Plus APD link to launch the PERMITS Plus system.

### Topics

- [Associating a PERMITS Plus APD with a Record](#)
- [Removing a Related PERMITS Plus APD](#)
- [Searching for a PERMITS Plus APD](#)

### Associating a PERMITS Plus APD with a Record

If your agency uses the PERMITS Plus permitting system and is transitioning to Civic Platform, you can maintain your PERMITS Plus APD records even as you begin to create new records in Civic Platform.

#### To associate a PERMITS Plus APD with a record

1. Locate and open the existing record you want to associate with an APD. See [Using the Search Features](#) for more information about using search.  
Civic Platform displays the detail portlet.
2. Click the Related Records tab.  
Civic Platform displays the Related Records portlet.
3. Click **Look Up**.  
Civic Platform displays a record Search portlet.
4. In the **Data Source** field drop-down menu, choose **P+ - Permit Plus**.  
Complete other fields as available.
5. Click **Submit**.  
Civic Platform returns a list of PERMITS Plus APDs that match your search criteria.
6. Select the APD you want to associate.
7. Click **Select as Parent** to set it as the parent of the current application, or **Select as Child** to set it as the child of the current application.  
Civic Platform associates the APD record to the record.

### Removing a Related PERMITS Plus APD

1. Locate and open the existing record you want to associate to an APD. See [Using the Search Features](#) for more information about using search.  
Civic Platform displays the detail portlet.
2. Click the Related Records tab.  
Civic Platform displays the APDs and records related to the application. You can identify APDs by the symbol [P+].
3. Select each PERMITS Plus APD you are removing

**4. Click Delete.**

Civic Platform removes the APD from the Related records list.

**Searching for a PERMITS Plus APD**

If your agency subscribes to PERMITS Plus, you can search for an APD from the Civic Platform Building Permits portlet. Click an APD hyperlink to launch PERMITS Plus and open the selected record.

**To search for a PERMITS Plus APD****1. Navigate to the Service Requests or Building Permit portlet.**

Civic Platform displays the list portlet.

**2. Click Search.**

Civic Platform displays a search portlet.

**3. Locate the Data Source field drop-down menu and choose P+ - Permit Plus. You can use other search criteria as desired.****4. Click Submit.**

Civic Platform displays the APD search results. APD records show P+ as the data source; Civic Platform records show no data source.

**5. To view an application or a service request, click the name link.**

Civic Platform launches PERMITS Plus and displays the APD detail portlet.

## Examining Record Details

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Application records can include any or all of the fields listed in [Application Record Fields](#). The records might also contain additional sections to collect related data. The following sections might be available on your application record forms.

- [Working in the Applicant and Contact Sections](#)
- [Working in the Address Section](#)
- [Working in the Structures or Establishments Section](#)
- [Working in the Documents Section](#)
- [Working in the People Section](#)
- [Working in the Education Section](#)
- [Working in the Continuing Education Section](#)
- [Working in the Examination Section](#)

### Tables in this section

- [Application Record Fields](#)
- [Applicant and Contact Fields](#)
- [Record Summary Page Sections](#)

## Application Record Fields

The table below lists and defines fields that might be available as you work with records.

Table 10: Application Record Fields

<b>Alt ID</b>	For agencies with applications that follow a unique numbering convention, agencies can configure the Alternate ID and apply it to applications along with the Record ID.  The Alternate ID value is auto-generated when you submit a new application. Users cannot modify the value.
<b>Application Name</b>	A unique name that identifies the application.
<b>Assigned Date</b>	The date that a department or individual receives an application assignment.
<b>Assigned To Department</b>	The department responsible for the application.
<b>Assigned to Staff</b>	The individual who is responsible for the application.
<b>Channel Reported</b>	The incoming channel used by the applicant to submit the application. For example, the application might come through the mail, an email, a public Internet site, or a phone call.
<b>Check Number</b>	If an applicant pays a fee with a check, this is the check number.

<b>Certification Accepted</b>	<p>For applications created in Citizen Access, this field displays whether public users agreed with the statement in the certification section of the application review page.</p> <p>For more information about the statement in the certification section, see the "Page Flow Configuration" chapter in the <i>Civic Platform Citizen Access Administrator Guide</i>.</p>
<b>Certification Date</b>	<p>For applications created in Citizen Access, this field displays the date when public users agreed with the statement in the certification section of the application review page.</p> <p>For more information about the statement in the certification section, see the "Page Flow Configuration" chapter in the <i>Civic Platform Citizen Access Administrator Guide</i>.</p>
<b>Trust Account ID</b>	If an applicant pays a fee with a trust account, this is the trust account ID number.
<b>City</b>	Enter the name of the city wherein the primary address is located.
<b>Closed by Department</b>	The department responsible for closure from the drop-down list.
<b>Closed by Staff</b>	Choose the name of the staff member who initiated the closure. Click the <b>Current User</b> link to enter your user name into the field.
<b>Closed Date</b>	The closure date.
<b>Completed by Department</b>	The department that completed the application requirements.
<b>Completed by Staff</b>	The name of the staff member responsible for completing the application requirements. Click the <b>Current User</b> link to enter your user name into the field.
<b>Contact Address Line 1, Line 2, and Line 3</b>	The street address for the contact using the 3 address lines provided.
<b>Contact Address City</b>	The city where the contact resides.
<b>Contact Address State</b>	The state where the contact resides.
<b>Contact Address Zip</b>	The postal ZIP code for the contact's address.
<b>Contact Address Country/Region</b>	The country or region where the contact resides.
<b>Contact Email</b>	The email address of the primary contact associated with the application.
<b>Contact FEIN</b>	The 9-digit Federal Employer ID Number of the primary contact on the record. For example, 12-3456789. You can configure Civic Platform to mask the FEIN value after saving the data so that only the last four digits display. Enable this field on the Record detail form by clicking the <b>Organization</b> button.
<b>Contact First Name</b>	The first name of the primary contact associated with the application.
<b>Contact Last Name</b>	The last name of the primary contact associated with the application.
<b>Contact Middle Name</b>	The middle name of the primary contact associated with the application.
<b>Contact Relationship</b>	The primary contact's relationship to the application.
<b>Contact SSN</b>	The 9-digit Social Security Number for the contact on the record. After saving the data, the SSN displays as ***-**-1234.
<b>Contact Type</b>	<p>When your agency administrator configures this field for display, you can select the type of primary contact you want to associate with the application. The contact type can be either an individual or an organization.</p> <p>When you select the <b>Individual</b> option, these fields become available: First Name, Middle Name, Last Name, SSN. These fields are no longer available: Organization Name, DBA/Trade Name, FEIN.</p> <p>If you select the <b>Organization</b> option, reverse the enabled vs disabled fields.</p>

<b>Data Source</b>	If your agency uses the PERMITS Plus permitting system, use this drop-down menu to select a data source for your search. Select <b>AA - Civic Platform</b> to search Civic Platform records. Select <b>P+ - Permits Plus</b> to search PERMITS Plus APD records.
<b>DBA/Trade Name</b>	The Licensed Professional's business name.
<b>Detailed Description</b>	A detailed description of the proposed work.
<b>Direction</b>	The street direction designation of the primary address associated with the application. For example, choose "N" to indicate a north direction as in "North Broadway."
<b>Email</b>	The email address of the primary contact associated with the application.
<b>Expiration Date</b>	The date when a license record expires.
<b>Expiration Status</b>	The status of a license record.
<b>First Issued Date</b>	The date of first issue.
<b>First Name</b>	The first name of the primary contact associated with the application. This field supports wildcard searches (see <a href="#">Performing a Wildcard Search</a> ).
<b>House # Alpha (end)</b>	The ending street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street number and street name is "10-23A WHITESTONE," 23A is the ending street number.
<b>House # Alpha (start)</b>	The beginning street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street number and street name is "10-23A WHITESTONE," 10 is the beginning street number.
<b>Initiated by Product</b>	This field is read-only and identifies the Civic Platform product area where the application is submitted.
<b>Last Name</b>	The last name of the primary contact associated with the application. This field supports wildcard searches (see <a href="#">Performing a Wildcard Search</a> ).
<b>Level # (end)</b>	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level # (start)</b>	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level Prefix</b>	The prefix for the level numbers (floor numbers) that make up the address.
<b>Legal Description</b>	The legal description of the parcel associated with the application. This field supports wildcard searches (see <a href="#">Performing a Wildcard Search</a> ).
<b>Middle Name</b>	The middle name of the primary contact associated with the application.
<b>Opened Date</b>	The date when Civic Platform creates the application record. Click the Calendar icon located next to the From and To fields to specify a date range. Civic Platform automatically enters the dates.
<b>Opened Department</b>	The department responsible for creating the record. Click the <b>Selection</b> icon to choose a department.
<b>Opened Staff</b>	The name of the individual responsible for creating the record. If you are responsible, click the <b>Current User</b> link.
<b>Organization Name</b>	The name of the organization to which the primary contact belongs. This field supports wildcard search (see <a href="#">Performing a Wildcard Search</a> ).
<b>Owner Name</b>	The primary owner associated with the application. This field supports wildcard search (see <a href="#">Performing a Wildcard Search</a> ).
<b>Parcel Number</b>	The primary parcel number associated with the application. This field supports wildcard search (see <a href="#">Performing a Wildcard Search</a> ).



<b>Permissions</b>	<p>Indicates the level of access for the contact to the record in Citizen Access.</p> <p><b>Full</b> grants the contact full access to the record in the My Record list and the Record search result list in Citizen Access.</p> <p><b>Schedule Inspections Only</b> grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access and allows the contact to schedule inspections.</p> <p><b>Read</b> grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access.</p> <p><b>None</b> denies the contact access to the record in the My Record list and the Record search result list in Citizen Access.</p>
<b>Primary</b>	<p>For an application, you can designate a primary Applicant, Address, Parcel, Owner, and Licensed Professional in each section. Set to Yes to specify the primary applicant, address, parcel, owner, or professional for the application. For example, you can specify a primary owner on an application if there are multiple owners. For each application there can be only one primary applicant, address, parcel, owner, or professional.</p> <p>If, for example, an application has only one associated parcel, Civic Platform automatically designates it as the primary parcel.</p> <p>To change a primary setting from “No” to “Yes,” you must first change the current primary designation.</p> <p>In most other actions, Civic Platform also duplicates the primary setting information. For example, when you clone or copy the application (Daily &gt; Application &gt; Copy Application), Civic Platform also copies the parcel settings to the new application.</p>
<b>Priority</b>	The priority level assigned to the application.
<b>Receipt Number</b>	If Civic Platform generates a receipt (payment or refund) for the current application, this is the receipt number.
<b>Record Type</b>	The type of application. You cannot modify this field. The field lists the group, type, subtype, and category of the application type.
<b>Record Description</b>	A brief description of the application. For example, if application is a building permit for a commercial shopping center, you can enter “Application for Bethesda Mall Building Permit.”
<b>Record ID</b>	The Record ID identifies the application in Civic Platform. The ID is auto-generated when you submit a new application. You cannot modify this value.
<b>Record Name</b>	A name that uniquely identifies the basic record and distinguishes it from other records in Civic Platform. For example, if the application is a building permit for a commercial shopping center, you might enter “Bethesda Mall.”
<b>Record Type</b>	<p>The type of application. You cannot modify this field..</p> <p>This field displays the application type for the record. The following information displays: group, type, subtype, and category. You cannot modify this value.</p> <p>When you perform an application search, you can select an application type from the group, type, subtype, and category drop-down list. The available application type options include all the application types that your agency administrator sets as enabled, or disabled yet searchable.</p>
<b>Relationship</b>	The primary contact’s relationship to this application. If you are searching for an application, use the drop-down list to choose a relationship. For example, choose “citizen.”
<b>State</b>	The state of the primary address associated with the application.

<b>Status</b>	The current status of the application. If you are updating application details, you can change this status. The agency defines the application status. For example, Pending, Opened, Closed, Assigned, Unassigned, and Complete.
<b>Status Group</b>	The status group the application status belongs to.
<b>Status Reason</b>	A reason that explains why the record displays a certain status.
<b>Street # (Start/End)</b>	The street number(s) of the primary address associated with the application. If the primary address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.
<b>Street Direction</b>	The street direction of the primary address associated with the application. For example, choose "N" to indicate a north direction as in "North Broadway."
<b>Street Name</b>	The street name of the primary address associated with the application. This field supports wildcard searches (see <a href="#">Performing a Wildcard Search</a> ).
<b>Street Number</b>	The street number of the primary address associated with the application.
<b>Street Suffix</b>	The street suffix of the primary address associated with the application.
<b>Street Type</b>	The street type of the primary address associated with the application. For example, choose Street, Boulevard, or Lane.
<b>Street Suffix (Direction)</b>	The street suffix which indicates the direction. For example, E, NE, and SW.
<b>Unit Type</b>	The unit type designation of the primary address associated with the application. Enter the unit type of the location associated with the application. For example, enter CONDO, APT, or SUITE.
<b>URL</b>	The URL to the record information stored in a third-party web application. If necessary, you can append the session variable \$\$ALTID\$\$ to the URL like this: <a href="http://www.bridgeview.gov/permitsystem?permitID=\$\$ALTID\$\$">http://www.bridgeview.gov/permitsystem?permitID=\$\$ALTID\$\$</a> . The session variable retrieves the Alt ID of the record from the application intake form or the Record Detail portlet.
<b>ZIP Code</b>	The postal code of the primary address associated with the application.

## Applicant and Contact Fields

The table below lists and defines fields that might be available as you work with in the Contact section of an application form.

Table 11: Contact and Applicant Detail

<b>Address/Street Address</b>	The contact's address information. You can have up to three lines of address information.
<b>City</b>	The city in which the contact resides.
<b>Contact Type</b>	Select the <b>Individual</b> option if the contact is a person. Civic Platform activates the First Name, Last Name, Middle Name, and SSN fields, and deactivates the FEIN field. Select the <b>Organization</b> option if the contact is a business or other entity. Civic Platform deactivates the First Name, Last Name, Middle Name, and SSN fields, and activates the FEIN field.
<b>Country/Region</b>	The country or region in which the contact resides.
<b>DBA/Trade Name</b>	This acronym stands for Doing Business As and refers to the contact's preferred business or trade name. This field is only active when the Contact Type selected is Organization.

<b>Email</b>	The contact's email address.
<b>Fax</b>	The contact's fax number, with Country and Area code.
<b>FEIN</b>	This acronym stands for Federal Employer Identification Number. The government uses this number to identify a business for tax purposes. This field is only active when the Contact Type selected is Organization.
<b>First Name</b>	The contact's first name. This field is only active when the Contact Type selected is Individual.
<b>Full Name</b>	The contact's full name.
<b>Last Name</b>	The contact's last name. This field is only active when the Contact Type selected is Individual.
<b>MI</b>	The contact's middle initial. This field is only active when the Contact Type selected is Individual.
<b>Notes</b>	Enter any additional information in this text field.
<b>Notify contact with record update</b>	Indicates whether this contact should receive a notification when the application status changes. Choose <b>Yes</b> from the drop-down list to notify and choose <b>No</b> to not notify.
<b>Organization Name</b>	The organization to which the contact belongs. This field is only active when the Contact Type selected is Organization.
<b>Permissions</b>	Indicates the level of access for the contact to the record in Citizen Access. <b>Full</b> grants the contact full access to the record in the My Record list and the Record search result list in Citizen Access. <b>Schedule Inspections Only</b> grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access and allows the contact to schedule inspections. <b>Read</b> grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access. <b>None</b> denies the contact access to the record in the My Record list and the Record search result list in Citizen Access.
<b>Phone 2, Phone 3</b>	Additional telephone numbers for the contact. Indicate primary, secondary, and tertiary numbers by using the Telephone, Phone 2, and Phone 3 fields.
<b>PO Box</b>	The contact's post office box number.
<b>Preferred Channel</b>	Choose from this drop-down list the method by which the contact prefers to receive notification; for example, by phone, email, fax, or postal mail.
<b>Primary</b>	This drop-down list indicates whether the contact is the primary contact for the application. Choose <b>Yes</b> to set as the primary contact and <b>No</b> to set as not the primary contact.
<b>Relationship</b>	The contact's relationship to the application; for example, applicant, or agent. Use the drop-down list to choose a contact relationship.
<b>State</b>	The state in which the contact resides. Use the drop-down list to choose a state.
<b>SSN</b>	The contact's Social Security Number. This field is only active when the Contact Type selected is Individual.
<b>Telephone</b>	The contact's telephone number, including Country and Area codes.
<b>Title</b>	The contact's business title, for example President. This field is only active when the Contact Type selected is Individual.
<b>Type</b>	The type of contact. Civic Platform uses contact types to group contacts with similar functions. Types might include Complainant, or Billing Contact. Use the drop-down list to choose a contact type.

<b>Zip Code</b>	The contact's zip code.
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## Record Summary Page Sections

The following table lists the sections that might display on the Record Summary page.

Table 12: Record Summary Page Selections

<b>Application Summary Page Section</b>	<b>Section Description</b>
<b>Adhoc Task Status</b>	This section displays the status of any ad hoc tasks associated with the application.
<b>Record Comments</b>	This section displays record comments.
<b>Record Detail</b>	Click the record detail link in this section to view the Record detail portlet.
<b>Application Specific Info</b>	This section displays application-specific information about the selected record type.
<b>Record Status</b>	Click the application status link to view the Application Status detail portlet.
<b>Balance</b>	Click the balance amount to view the Payment detail portlet.
<b>Condition Status</b>	Click a condition to view the associated Condition Detail and History portlets.
<b>Contact Info</b>	This section displays the contact detail for record contacts.
<b>Description of Work</b>	Click the description of work link in this section to view the Record detail portlet.
<b>File Date</b>	This section displays the date the application was submitted. Click the link to view the Record detail portlet.
<b>Inspections</b>	This section displays pending, scheduled, and resulted inspections associated with the record.  For more information on the Inspections section, see <a href="#">Viewing Inspections on the Summary Page</a> .
<b>Job Value</b>	Click the job value amount to view the Additional Information Form detail portlet.
<b>Licensed Professional Info</b>	This section displays licensed professionals associated with the record. Click the license number of a licensed professional to view the Professionals detail portlet.
<b>Parcel No</b>	This section displays parcels associated with the record. Click the parcel number to view the Parcel detail portlet.
<b>Required Inspections</b>	This section displays inspections that must occur before Civic Platform accepts the application.
<b>Structure</b>	This section displays structures associated with the record.
<b>Total Fee Assessed</b>	This section displays the total amount of fees assessed to the record. Click the total fee assessed link to view the Fee detail portlet.
<b>Total Fee Invoiced</b>	This section displays the total amount of the fees invoiced to the record. Click the total fee invoiced link to view the Payment detail portlet.
<b>Tracking #</b>	This section displays the record tracking number.

Application Summary Page Section	Section Description
<b>Workflow Status</b>	This section displays the workflow tasks associated with the record. The current application status link displays as a hyperlink. Click this link to the Workflow Task detail portlet.

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## Record Relationships

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Choose a topic from the list below to learn more about record relationships.

### **Related Information**

[Record Relationships Overview](#)

[Viewing Related Record Information](#)

[Building Relationships between Existing Records](#)

[Cloning a Record](#)

[Updating Related Records](#)

[Creating a Set of Related Records](#)

[Copying Record Data](#)

[Removing Record Relationships](#)

## Record Relationships Overview

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Building relationships between records can help streamline communication between different departments in your agency. The possible relationships between records are best understood by thinking of them in terms of parent, child, or sibling relationships. Child and grandchild records branch from parent records and grandparent records. When a parent record has child records associated it, the relationships between child records are 'sibling relationships.'

There are two basic approaches to establishing relationships:

- You can select another record as its parent or child when you open a record
- You can clone a record to create one or more new parent and new child records.

Both approaches enable you to transfer contact, payment, and even document data from one record to the other without changing existing relationships.

In addition to the parent and child hierarchical organizations of records, you can select several related records and create sets for batch processing. For example, you can create a set of related records that share the same workflow, and then batch process the workflow task status update for the set.

If the relationship between two records turns out to be inappropriate, you can remove the relationship.

## Viewing Related Record Information

There are two ways for you to access the related records of a given record.

1. Go to the Related Records column in the record list portlet. This column provides shortcut links to the parent, child, and sibling records for the current record.
2. Open the Related Records tab in the record detail portlet. This tab displays the record relationships in a tree view or list view. The tree view offers you a good graphical representation of the family hierarchy of the current record; the list view allows you to quickly access the details of the parent, child, and sibling records for the current record.



### Note:

The tree view can display all the parent applications of the current application including grandparent applications. The list view only displays the immediate parent applications.

### Topics

- [Opening Shortcuts to Related Records](#)
- [Viewing Related Records in Tree View](#)
- [Viewing Related Records in List View](#)
- [Viewing Right of Way Management data as Related Records](#)

### Opening Shortcuts to Related Records

When you want to view related record information about a particular record, select the Related Records tab in the record detail portlet. You can also click the links on the record list portlet.

#### To open shortcuts to related records

1. Find the record containing the related record information you want to view. See [Using the Search Features](#) for instructions on locating a record.

The list portlet shows the current record, and the record detail portlet shows the Summary tab for the current record.

2. Find the **Related Records** column in the list portlet, and click the **View** link or hover over the link in the current record.

Civic Platform provides shortcuts to the parent, child, and sibling records for the current record in a pop-up window.

<input type="checkbox"/> <a href="#">Case No.</a>	<a href="#">Street No.</a>	<a href="#">Related Records</a>	<a href="#">Opened Date</a>
<input type="checkbox"/> CBAC2011-00080		View <a href="#">Related Records(5)</a> × 11	

[CBNC2011-00026](#)  
[CBAC2011-00072](#)  
[CBAC2011-00073](#)  
[CBNC2011-00027](#)  
[CBNC2011-00028](#)

3. Click a related record link to view the related record details.

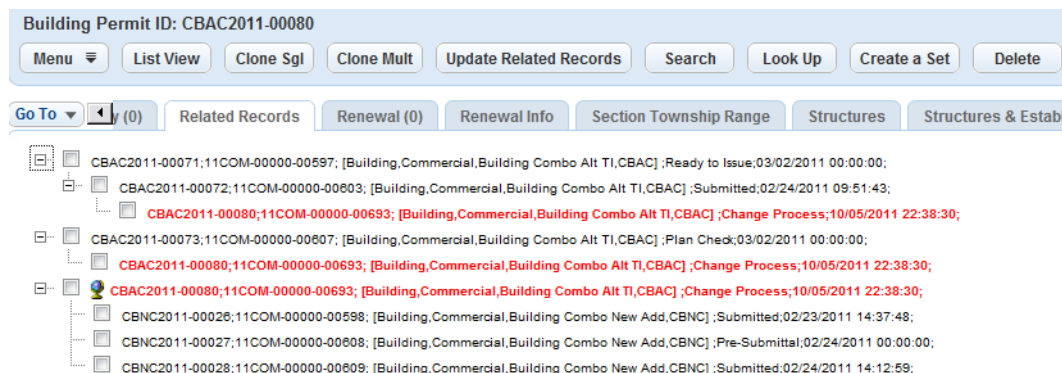
Civic Platform displays the Related Records tab for the selected application.

Depending on your agency administrator's settings, the default view mode of the Related Record is either tree view or list view for displaying the relationship of the selected application with its parent applications and child applications. You can switch between the two view modes by clicking the relevant button in the tab.



## Viewing Related Records in Tree View


The tree view of related records provides you with a graphical representation of the family hierarchy for the current record.



**Figure 13: Tree View of Related Records**

The tree view displays the current application with its parent applications and child applications in separate trees.

- The current application shows in red font in all the trees.
- A parent tree displays the traversal relationship of the current application with each of its top-level parents. All the parent trees have the current application as its leaf. If there are more than one leaves in a parent tree, the other leaves are the siblings of the current application.
- The child tree displays the current application with all its child applications and grandchild applications.

The current application is the root tree node of the child tree, marked with a global icon .

You can perform the following tasks in the tree view:

- Click the plus (+) or minus (-) sign for any node to expand or collapse that node.
- Perform a search. The search only checks the related applications in the child tree for matches. Search results are highlighted in the tree.



- Select one or more related applications for operations such as Update, Delete and Create a Set.

To switch from the tree view to list view, click **List View** in the toolbar.

## Viewing Related Records in List View

The list view lists the current application and its related applications. The list includes the immediate parents, all child and grandchild applications, and all sibling applications.

Record ID	Short Notes	Record Type	Status	Opened Date	Priority	Street Name	First Name	Last Name
<a href="#">12WST-00000-00058</a>		Building/Water Supply Test/NA/NA	Expired Application	12/27/2012		CLAUSS		
<a href="#">12WST-00000-00059</a>		Building/Water Supply Test/NA/NA	Expired Application	12/27/2012		SHORTHORN	Susanne	Cook
<a href="#">13COC-00000-00001</a>		PublicWorks/Certificate of Compliance/Lot Splits/new	Processing	01/22/2013		27TH	Juan	Munguia
<a href="#">12BCM-00000-01511</a>	Replace 2...	Building/Commercial/Minor/No Plans	Finalized	07/13/2012		27TH	Steve	Pacheco

**Figure 14: List View of Related Records**

Use the Relation column in the list view to see the relationship of each application with the current application. See [Relation Column in List View](#).

You can perform the following tasks in the list view:

- Click the Relation column name to sort the list view by the family hierarchy of the current application.
- Click the link to a related application. A new application detail portlet opens under the list view, displaying the details for the related application.
- Perform a search. The search checks in all the related applications for matches, and the related record list refreshes to show the search results.
- Select one or more related applications for operations such as Update, Delete, and Create a Set.

To switch from list view to tree view, click Tree View in the toolbar.

**Table 13: Relation Column in List View**

Application Relation	Display in "Relation" Column
<b>Immediate Parent Application</b>	Parent Application Alt ID
<b>Current Application</b>	Current Application Alt ID (in red font)
<b>Sibling Application</b>	Parent Application Alt ID / Sibling Application Alt ID
<b>Child Application</b>	Current Application Alt ID (in red font) / Child Application Alt ID
<b>Grandchild Application</b>	Current Application Alt ID (in red font) / Child Application Alt ID / ... / Grandchild Application Alt ID


## Viewing Right of Way Management data as Related Records

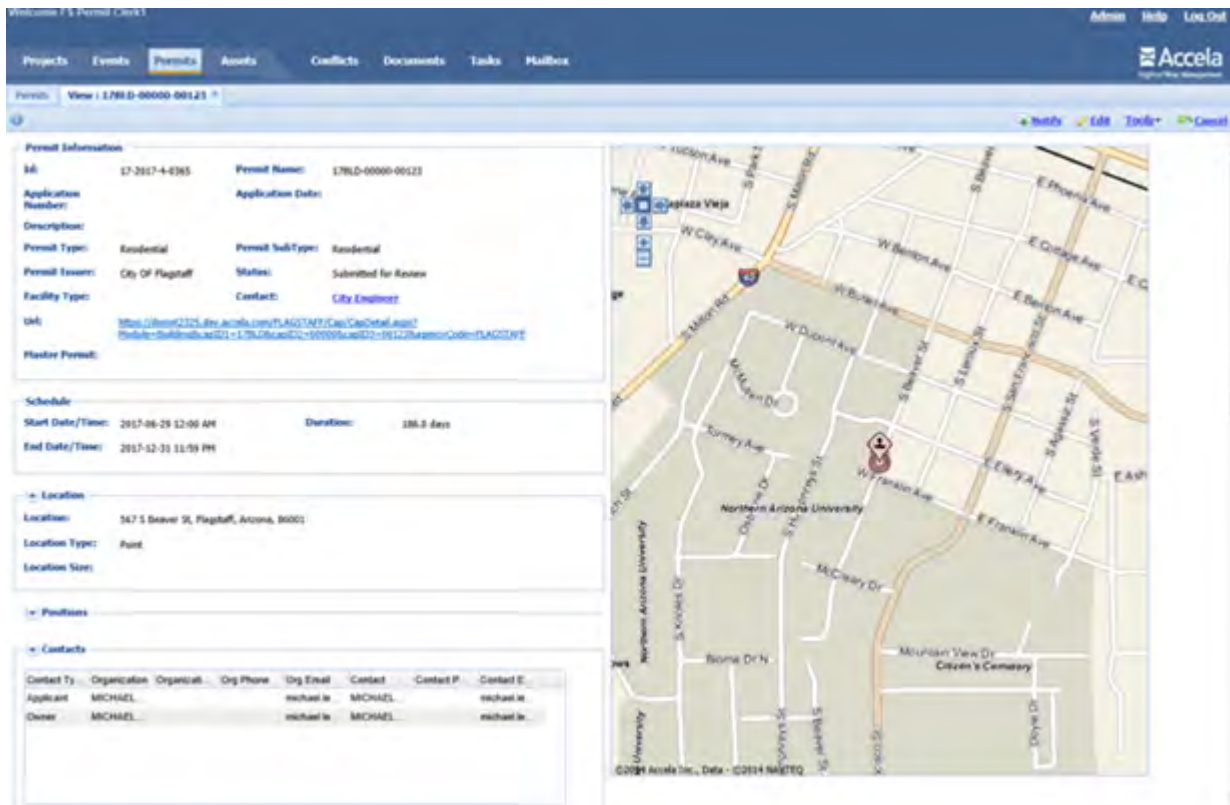
When you create a Record in either Citizen Access or Civic Platform mapped to a Right of Way Management Record, the Record is created automatically with a link which allows access to the Right of Way Management solution. Users may then view Right of Way Management details by clicking on the link in Civic Platform.

1. Go to the Records portlet in Civic Platform.
2. Look up the Civic Platform Record with the related Right of Way Management Record.
3. Click the **Related Records** detail tab.
4. Click the link under **ROWM Detail**.



5. Log in to the Right of Way Management site to view Right of Way details for the Record.

 **Note:** The staff user will need valid credentials to access the Right of Way Management solution.



## Building Relationships between Existing Records

Relationships between records can streamline communication between departments in your agency. If two records have the same address and workflow history, associating the two records by building a parent-child relationship can make it more efficient to handle the two records.

### Topics

- [Selecting a Record as Parent](#)
- [Selecting a Record as Child](#)

### Selecting a Record as Parent

You can look up and select a record as the parent for the current record. After you select the parent record, you can select which data that you want to copy from parent to child. Some of the data elements that you can copy include Workflow Status, Valuation Entries, Conditions of Approval (with the ability to copy any or all condition options), Inspections, ASI data, and more. Some data elements give you the ability to define certain types of that data element. For example, you can choose whether to copy any condition of approval or only certain conditions.

#### To select a record as parent for the current record

1. Use Search to locate the record to which you want to assign the new relationship. See [Using the Search Features](#) for instructions on locating a record.

Civic Platform displays the record detail portlet.

2. Click the Related Records tab.

Civic Platform displays the Related Records portlet. The portlet shows the existing related records of the current record.



3. Click **Look Up**.

Civic Platform displays a search portlet.

4. Enter search criteria as needed to locate the record that you want to associate as the parent of the current record.

5. Click **Submit**.

Civic Platform displays the search results.

6. Select the record that you want to designate as parent of the current record. If you select a record that is part of a different group, not all data may copy from the source to the destination.

## 7. Click **Select as Parent**.

Civic Platform displays the Record Type-Specific Information and General Record Information with a list of data elements. Some data elements allow you to specify which of the selected data elements that Civic Platform is to copy.

The screenshot shows a form with two main sections: "Record Type - Specific Information" and "General Record Information". At the top, there are buttons for "Submit", "Reset", "Cancel", and "Help".

**Record Type - Specific Information:**

- Fee Items ([Select](#))
- Workflow Status
- Inspection ([Select](#))
- App Specific Info ([Select](#))
- Additional Info
- Valuation Calc
- Workflow Task Specific Information
- Status or New Status: --Select--
- Status History

**General Record Information:**

- Record Details ([Set Application Description](#))
- Parcel
- Owner
- Address
- Assets
- Licensed Professionals ([Select](#))
- Contact ([Select](#))
- Document
- Preserve Dates
- Record Conditions ([Select](#))
- Inspection Conditions ([Select](#))
- Conditions of Approval ([Select](#))
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

## 8. Select each data element you want to copy from the current record to the parent record. See [Record Copying and Cloning Form Fields](#) for information about the options.

## 9. If you select a data element that allows you drill down further and select more specific data elements, click the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which of the data elements to copy.

For example, if you click the **Select** link for Conditions of Approval, a dialog displays, prompting you to select which conditions to copy both by severity and by condition status.

The dialog box is titled "Select Conditions to Copy" and has a close button (X) in the top right corner. It contains two columns of options, each with a checkbox:

- Select by Severity**
- Lock
- Hold
- Notice
- Required
- Select by Condition Status**
- Applied(Applied)
- Not Applied(Not Applied)

At the bottom of the dialog, there are "OK" and "Cancel" buttons.

## 10. If you select **Status** or **New Status**, you can use the drop-down list to specify a particular status to copy. Otherwise, leave the drop-down list field blank to copy all status options.



### Note:

When you select **Status** or **New Status**, Civic Platform enables the **Status History** option and you can select it as well.

### a. To select all of the options in a list, select the **bolded** option at the head of the list.

For example, in the graphic preceding this step, you can select the **Select by Severity** box if you want to copy all condition severity levels.

### b. To select certain options in a list, clear the **bolded** option at the head of the list and then select only those options you want to copy.

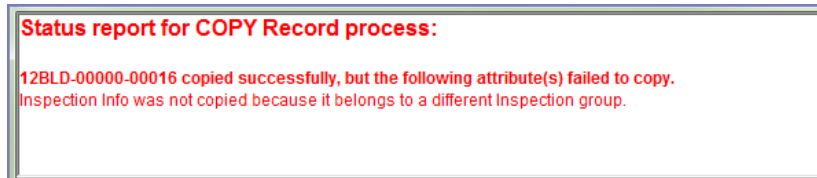
### c. Click **OK**.

You return to the data element selection list.

11. Review your selections carefully.

12. Click **Submit**.

A pop-up Status Report window lists which information that Civic Platform copied successfully and which information that Civic Platform could not copy because it belongs to a different group.



The Related Records tab for the current record detail portlet displays the relationships of the current record and its related records, including the newly-assigned parent record.

## Selecting a Record as Child

A record can have one or more child records. You can select child records from the Related Record tab. After you select the child record, you can select which data elements that you want to copy from parent to child.

Some of the data elements that you can copy include Workflow Status, Valuation Entries, Conditions of Approval (with the ability to copy any or all condition options), Inspections, ASI data, and more. Some data elements give you the ability to define certain types of that data element. For example, you can choose whether to copy any condition of approval or only certain conditions.

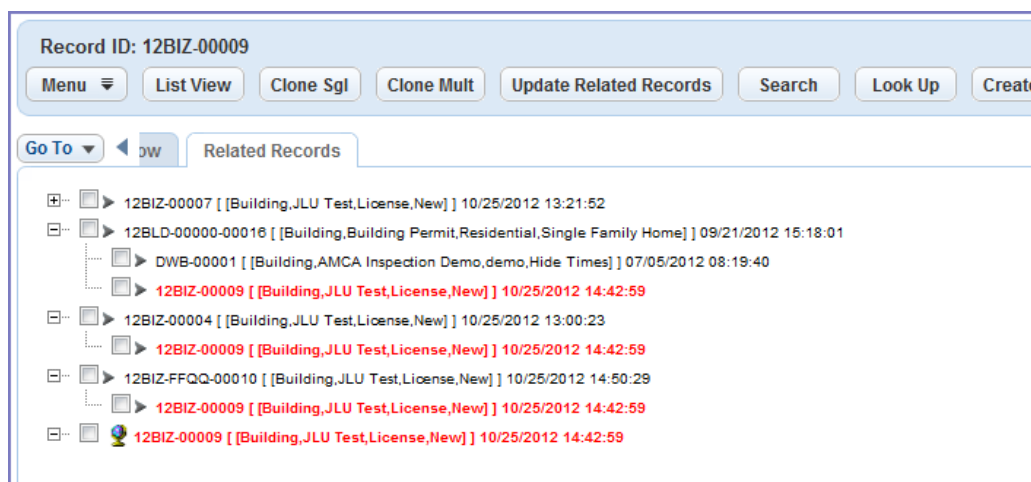
### To select a record as child for the current record

1. Find the records to which you want to assign the new relationship. See [Using the Search Features](#) for instructions on locating a record.

Civic Platform displays the record detail portlet.

2. Click the Related Records tab.

Civic Platform displays the Related Records portlet. The portlet shows the existing related records for the current record.



3. Click **Look Up**.

Civic Platform displays a search portlet.

4. Enter search criteria as needed to locate the record that you want to be the child of the current record.

5. Click **Submit**.

Civic Platform displays the search results.

6. Select the record(s) that you want to designate as a child of the current record.

7. Click **Select as Child**.

Civic Platform displays the Record Type-Specific Information and General Record Information with a list of data elements. Some data elements allow you to specify which of the selected data elements that Civic Platform is going to copy.

The screenshot shows a user interface with a light blue header bar containing four buttons: Submit, Reset, Cancel, and Help. Below the header, there are two columns of checkboxes. The left column is titled "Record Type - Specific Information" and includes: Fee Items (Select), Workflow Status, Inspection (Select), App Specific Info (Select), Additional Info, Valuation Calc, Workflow Task Specific Information, Status or New Status: --Select-- (dropdown), and Status History. The right column is titled "General Record Information" and includes: Record Details (Set Application Description), Parcel, Owner, Address, Assets, Licensed Professionals (Select), Contact (Select), Document, Preserve Dates, Record Conditions (Select), Inspection Conditions (Select), Conditions of Approval (Select), Education, Continuing Education, Examination, Record Comments, and Activities.

8. Select the data elements you want to copy from the current record to the child record. See [Record Copying and Cloning Form Fields](#) for information about the options.

9. If you select a data element that allows you drill down further and select more specific data elements, click the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which of the data elements to copy.

For example, if you click the **Select** link for Conditions of Approval, a dialog displays, prompting you to select which conditions to copy both by severity and by condition status.

The screenshot shows a dialog box titled "Select Conditions to Copy" with a close button (X) in the top right corner. The dialog contains two columns of checkboxes. The left column is titled "Select by Severity" and includes: Lock, Hold, Notice, and Required. The right column is titled "Select by Condition Status" and includes: Applied(Applied) and Not Applied(Not Applied). At the bottom of the dialog, there are two buttons: OK and Cancel.

a. To select all of the options in a list, select the **bolded** option at the head of the list.

For example, in the graphic above, select **Select by Severity** to copy all condition severity levels.

b. To select certain options in a list, clear the **bolded** option at the head of the list and then select only those options you want to copy.

c. Click **OK**.

You return to the data element selection list.

10. If you select **Status** or **New Status**, you can use the drop-down list to specify a particular status to copy. Otherwise, leave the drop-down list field blank to copy all status options.



**Note:**

When you select **Status** or **New Status**, Civic Platform enables the **Status History** option and you can select it as well.

11. Review your selections carefully.

12. Click **Submit**.

A Status Report window lists the information that Civic Platform copied successfully and, if any, the information that Civic Platform could not copy because it belongs to a different group.



The Related Records tab for the current record detail portlet lists the current record and its related records, including the newly-assigned parent record.



## Cloning a Record

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To create a new record that has the same owner, contact, and licensed professional information as an existing record, use the cloning feature. When you clone a record, you are creating a duplicate of the original record with a new record ID number. The source record is the parent record, and the new cloned record is the child. When you clone more than one record from a source parent, each cloned record is a sibling to the others.

### Topics

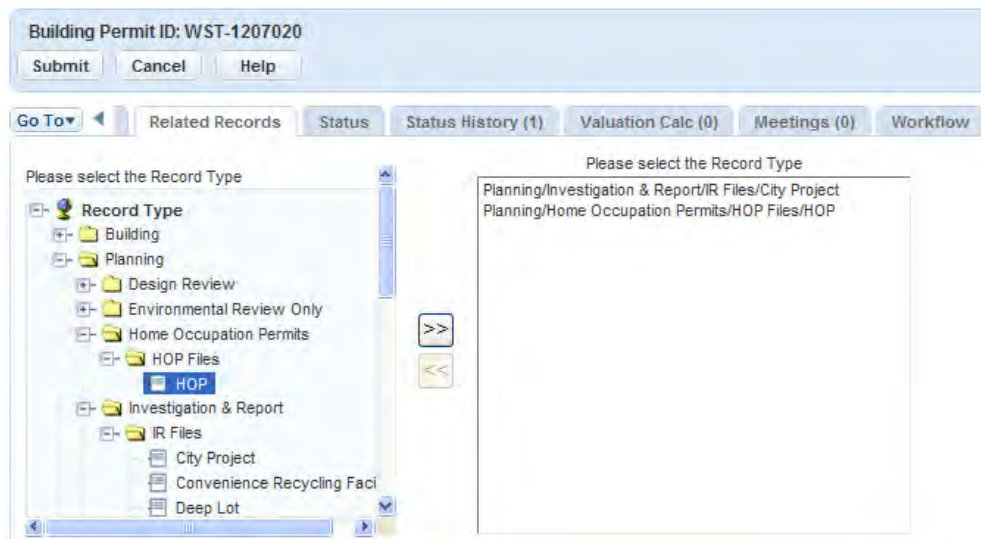
- [Cloning Records from the Related Records Tab](#)
- [Cloning Records from the Record Tab](#)

### Cloning Records from the Related Records Tab

You can clone records from the related records tab on a record.

#### To create cloned records from the Related Records tab

1. Navigate to the portlet you are working in and use Search to locate and select the record you want to clone. See [Using the Search Features](#) for more information on searching.  
Civic Platform displays the record list portlet.
2. Click the Related Records tab.  
Civic Platform displays the Related Records portlet.
3. Do any of the following:
  - To create a single child record by cloning, do the following:
    1. Click **Clone Sgl.**  
Civic Platform displays an intake form you can use to enter new record details.
    2. Select a record type from the **Record Type** list.
    3. Complete the intake form fields with available data. Civic Platform pre-populates some fields from the original record. You can modify the field data if needed.
    4. Click **Submit.**  
Civic Platform creates the new record and automatically associates it to the current record.
  - To create multiple child records by cloning, do the following:
    1. Click **Clone Mult.**  
Civic Platform displays a Record Type navigation tree portlet.
    2. Highlight a record type in the navigation tree.
    3. Click the **>>** button to add the Record type to the Selected Type Record list.  
If you add more than one record type to the Selected Record Types list, Civic Platform creates one record for each type selected.



Use the << button to remove a selected record type from the list you are creating.

4. Click **Submit**.

Civic Platform displays a list of data elements.

5. Choose each data element that you want to copy from the parent record to the new child records. See [Record Copying and Cloning Form Fields](#) for information about the options.

6. If you select a data element that allows you drill down further and select more specific data elements, click the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which of the data elements to copy.

For example, if you click the **Select** link for Conditions of Approval, a dialog displays, prompting you to select which conditions to copy both by severity and by condition status.



To select all of the options in a list, select the **bolded** option at the head of the list.

To select certain options in a list, clear the **bolded** option at the head of the list and select only those options you want to copy.

7. Review your selections carefully.

8. Click **Submit**.

Civic Platform displays a Report Copy Info window where the status of the data copy process displays. On the Related Records portlet, you see a message that indicates that Civic Platform added the child records successfully.

## Cloning Records from the Record Tab

### To create clone records from the Record tab

1. Navigate to the portlet you are working in and use Search to locate and select the record you want to clone. See [Using the Search Features](#) for more information on searching.

Civic Platform displays the record list portlet.

2. Click the Record tab.

Civic Platform displays the Record portlet.

3. Hover your mouse over the **Menu** button and choose **Clone** from the command menu.

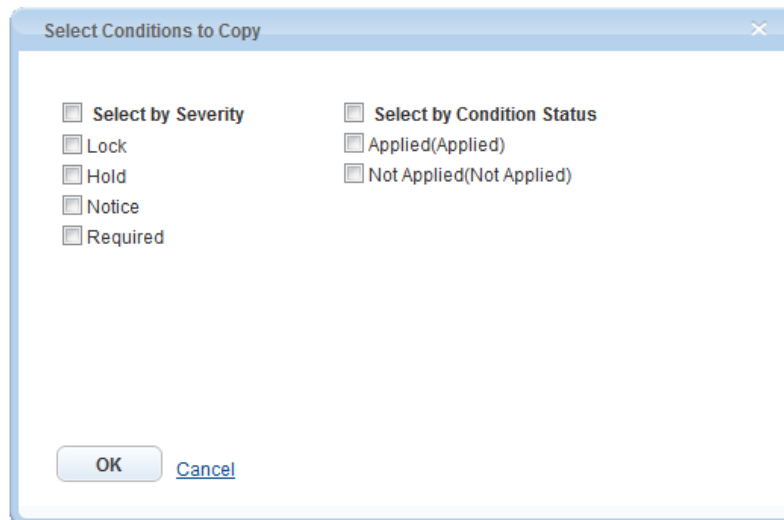
Civic Platform displays a form prompting you to select the number of records to clone and the record type that you want to use for the new record.

4. Do the following:

- a. Specify the number of records you want to clone.
- b. Specify whether the child records are to be included in a set or not. If yes, enter the set code in the **Clone to Set** field. For set code information, see [Creating a New Set](#).
- c. Specify the record type(s) for the clones you are creating by selecting record types from the tree list in the left panel.  
Use the >> key to select additional record types or the << key to de-select record types.
- d. Click **Submit**.

Civic Platform displays the Record Type-Specific Information and General Record Information with a list of data elements.

5. Select the data elements you want to copy from the current record to the new cloned record. See [Record Copying and Cloning Form Fields](#) for information about the options.
6. If you select a data element that allows you drill down further and select more specific data elements, click the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which of the data elements to copy.  
For example, if you click the **Select** link for Conditions of Approval, a dialog displays, prompting you to select which conditions to copy both by severity and by condition status.



- a. To select all of the options in a list, select the **bolded** option at the head of the list.
  - b. To select certain options in a list, clear the **bolded** option at the head of the list and select only those options you want to copy.
  - c. Click **OK**.
7. Review your selections carefully.
  8. Click **Submit**.  
Civic Platform creates the cloned records.

## Updating Related Records

When you edit an individual record, only the data for that record changes. However, you can easily update multiple related records by using the Update Related Records option.

### To update related records

1. Find the parent record containing the new data that you want to copy. See [Using the Search Features](#) for instructions on locating a record.

Civic Platform displays the record detail portlet.

2. Click the Related Records tab.

Civic Platform displays the Related Records portlet.

3. Select the records you want to update.

Civic Platform displays the Related Record detail portlet.

4. Click **Update Related Records**.

Civic Platform displays the Group Data Synchronization portlet.

5. Select the data elements you want to update. See [Record Copying and Cloning Form Fields](#) for information about the options.

Some elements may have an additional option to drill down to more specific data. For example, if you select Contact, you can click the Select link to specify which contact types to update.

6. If you select **Status** or **New Status**, you can use the drop-down list to specify a particular status to copy. Otherwise, leave the drop-down list field blank to copy all status options.



#### Note:

When you select **Status** or **New Status**, Civic Platform enables the **Status History** option and you can select it as well.

7. Click **Submit**.

8. View the record detail summary screen and confirm the updates.

9. Click **Submit**.

Civic Platform displays a Status Report listing the data that it copied successfully, as well as the data that it could not copy.

Building Permit ID: WST-1207020

Submit Cancel Help

Go To ▾ ◀ Related Records Status Status History (1) Valuation Calc (0) Meetings (0) Workflow Workflow

Below is the updated Record Detail summary for Related Records 13COC-00000-00001,12BCM-00000-01511. Please confirm updates.

**Record Status**  
Action By Department: null/SAC/DSD/ADMIN/NA/NA/NA  
Action By: Admin User  
New Status: Expired Application  
Status Date:  
Comments:

**Owner (Full Name)**  
There is no data for the current Record. Existing selected Related Records data will be overwritten.

**Contact (Full Name)**  
Susanne Cook

**Address**  
12456 SHORTHORN RD, WILTON, CA 95693

**Parcel (Parcel #)**  
There is no data for the current Record. Existing selected Related Records data will be overwritten.

**10. Click Submit.**

Civic Platform prompts you to confirm that you want to change the selected data for the related record.

**11. Click OK.**

Civic Platform updates the selected related records.

## Creating a Set of Related Records

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You can create a new set of related records for easy record management.

### To create a set of related records

1. Find the parent record you want to work with. See [Using the Search Features](#) for instructions on locating a record.
2. Click the Related Records tab.  
Civic Platform displays the Related Records portlet.
3. Select each record that you want to add to the new set.
4. Click **Create a Set**.  
Civic Platform displays the Set creation form in the portlet.
5. Complete the fields. See [Creating a New Set](#).
6. Click **Submit**.  
Civic Platform creates the set and adds all the selected related records into the set.

For more information about sets, see [Sets](#).



## Copying Record Data

You can copy the data from one existing record to another or from an existing record to a record set.

If you copy a record that has examination data, be aware that only pending exam items can replicate to the new record. Civic Platform cannot copy exam items with a Scheduled status or a Completed status.



### Note:

Copying does not impact existing record relationships.

### To copy record data to an existing record

1. Find the record that you want to copy from. See [Using the Search Features](#) for instructions on locating a record.

Civic Platform displays the record detail portlet.

2. Hover over the **Menu** button and select **Copy** from the drop-down menu that displays.

Civic Platform displays the Copy to Record/Copy to a Set page.

Record ID: 14BLD-00000-00001

Submit Reset Cancel Help

Copy To Record:

Copy To A Set:

<p><b>Record Type - Specific Information</b></p> <p><input type="checkbox"/> Fee Items (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Workflow Status</p> <p><input type="checkbox"/> Inspection (<a href="#">Select</a>)</p> <p><input type="checkbox"/> App Specific Info (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Additional Info</p> <p><input type="checkbox"/> Valuation Calc</p> <p><input type="checkbox"/> Workflow Task Specific Information</p> <p><input type="checkbox"/> Status or New Status: <input type="text" value="--Select--"/></p> <p><input type="checkbox"/> Status History</p>	<p><b>General Record Information</b></p> <p><input type="checkbox"/> Record Details (<a href="#">Set Application Description</a>)</p> <p><input type="checkbox"/> Parcel</p> <p><input type="checkbox"/> Owner</p> <p><input type="checkbox"/> Address</p> <p><input type="checkbox"/> Assets</p> <p><input type="checkbox"/> Licensed Professionals (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Contact (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Document</p> <p><input type="checkbox"/> Preserve Dates</p>	<p><input type="checkbox"/> Record Conditions (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Inspection Conditions (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Conditions of Approval (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Education</p> <p><input type="checkbox"/> Continuing Education</p> <p><input type="checkbox"/> Examination</p> <p><input type="checkbox"/> Record Comments</p> <p><input type="checkbox"/> Activities</p>
---	--	---

3. Enter the Record ID number of the target record or set that you want to update and click the **Search** button to the right of the Copy to Record/Set field.

4. Select the record data elements you want to copy to the existing record. See [Record Copying and Cloning Form Fields](#) for information about the options.

Some elements may have an additional option to drill down to more specific data. For example, if you select Contact, you can click the Select link to specify which contact types to update.

5. Click **Submit**.

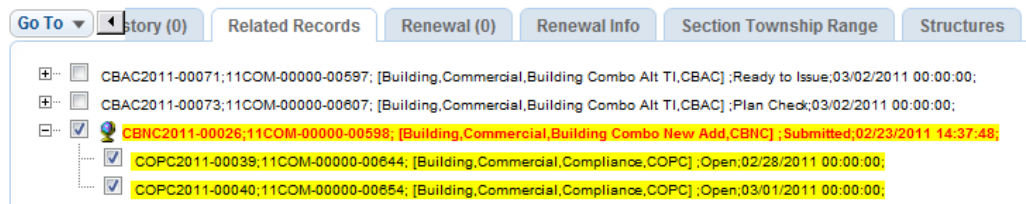
Civic Platform displays a Status Report pop-up message indicating that the record or set copied successfully.

## Removing Record Relationships

You can terminate the relationship between two records as needed.

### To remove a record relationship

1. Find the record for which you want to modify the relationship. See [Using the Search Features](#) for instructions on locating a record.  
Civic Platform displays the record detail portlet.
2. Click the Related Records tab.  
Civic Platform displays the Related Records portlet.
3. Select each record with a relationship you want to remove from the current record.



4. Click **Delete**.  
Civic Platform removes the record relationships.

## Record Copying and Cloning Form Fields

The following tables lists the options you can choose from when you copy or clone a record.

Table 14: Application Cloning Options, Part 1 of 2

Fields for Clone Mult Only	
<b># of Clones per Record Type</b>	The number of clones that you want to create from the source record.
<b>Clone to Set</b>	Use the <b>New Set</b> or <b>Existing Set</b> buttons in the toolbar to create or select a destination set for the new clone. When you select a set, the set number displays in this field box.



Table 15: Application Cloning Options, Part 1 of 2

Record Type - Specific Information	
<b>Fee Items</b>	Select to clone/copy fee items from the source record to the target record. Click the Select link to specify specific fee items to copy.
<b>Workflow Status</b>	Select to clone/copy workflow status from the source record to the target record.
<b>Inspection</b>	Select to clone/copy inspections from the source record to the target record. Click the Select link to specify inspections by inspection status.
<b>App Specific Info</b>	Select to clone/copy application specific information (ASI) data . Click the Select link to specify ASI and ASIT subgroups.
<b>Additional Info</b>	Select to clone/copy additional information from the source record to the target record.
<b>Valuation Calc</b>	Select to clone/copy valuations from the source record to the target record.
<b>Workflow Task Specific Information</b>	Select to clone/copy workflow task-specific information from the source record to the target record.
<b>Status or New Status</b>	Select to clone/copy the record status from the source record to the target record. To set a new status value, select an option from the New Status drop-down list in addition selecting <b>Status</b> or <b>New Status</b> .
<b>Status History</b>	Select to clone/copy status history data from the source record to the target record. This option is available only if the Status or New Status option is selected.

Table 16: Application Cloning Options, Part 2 of 2

General Record Information	
<b>Record Details</b>	Select to copy some record detail fields from the source record to the target record. Click the Set Application Description link to edit the application name and application description for both the source record and the target record.
<b>Parcel</b>	Select to clone/copy parcels from the source record to the target record.
<b>Owner</b>	Select to clone/copy owners from the source record to the target record.
<b>Address</b>	Select to clone/copy addresses from the source record to the target record.
<b>Assets</b>	Select to clone/copy assets from the source record to the target record.
<b>Licensed Professionals (s)</b>	Select to clone/copy licensed professionals from the source record to the target record. Click the Select link to specify licensed professionals by type.
<b>App Specific Info</b>	Select to clone/copy application specific information from the source record to the target record.
<b>Contact</b>	Select to clone/copy contacts from the source record to the target record. Click the Select link to specify contacts by type.
<b>Document</b>	Select to clone/copy documents (attachments) from the source record to the target record.

## General Record Information

<b>Preserve Dates</b>	<p>Select to clone/copy both the opened date and the reported date from the source record to the target record.</p> <p> <b>Note:</b> When cloning, the Close Date does not copy to the target record(s).</p> <p>If you do not select this option, the Opened Date field on the cloned record displays the date that the record was cloned.</p> <p> <b>Note:</b> The record status date clones/copies only when you clone or copy the record status, independent of the Preserve Dates option.</p>
<b>Record Conditions</b>	Select to clone/copy conditions from the source record to the target record. Click the Select link to specify record conditions by severity and/or by condition status.
<b>Inspection Conditions</b>	Select this option to clone/copy inspection conditions from the source record to the target record. Click the Select link to specify record conditions by severity and/or by condition status.
<b>Conditions of Approval</b>	Select to clone/copy conditions of approval from the source record to the target record. Click the Select link to specify conditions of approval by severity and/or by condition status.
<b>Education</b>	Select to clone/copy education data from the source record to the target record.
<b>Continuing Education</b>	Select to clone/copy continuing education data from the source record to the target record.
<b>Examination</b>	Select to clone/copy examinations from the source record to the target record.
<b>Record Comments</b>	Select to clone/copy record comments from the source record to the target record.
<b>Activities</b>	Select to clone/copy activities from the source record to the target record.
<b>Set Code</b>	Use this with the “Include In a Set” field described above. This is the code that identifies the Set.
<b>Application Type</b>	Click the “Select Application Type” link next to the Application Type field to select the application type for the new record.
<b>Include in a Set</b>	Select <b>Yes</b> if you want the new record to be included in a set. If you select Yes, provide a record set ID in the <b>Set Code</b> field.

## Maps in Civic Platform

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Choose a topic from the list below to learn more about using Accela GIS maps in Civic Platform back-office application.

### **Related Information**

[Maps At a Glance](#)

[Locating Places](#)

[Map Layers](#)

[Selecting Map Features](#)

[Creating and Editing Map Features](#)

[Redlining and Annotating a Map](#)

[Geo-locating Records](#)

[Printing a Map](#)

## Maps At a Glance

Civic Platform maps use Accela GIS to find locations and view a geographical display of agency records such as parcels, permits, inspections, plans, assets, work orders, and service requests. The map viewer provides users a visual understanding of transactional records to help identify and analyze land-use, zoning, inspection or service request routes, infrastructure, and other geo-centric information.

Accela GIS is the next generation version of the Accela Silverlight GIS map viewer. Accela GIS map users will quickly feel at ease using the new interface. It utilizes a JavaScript-based framework and provides an enhanced user experience when viewing and working with geographic information.

Let's take a glance at what you can do with the Accela GIS map viewer:



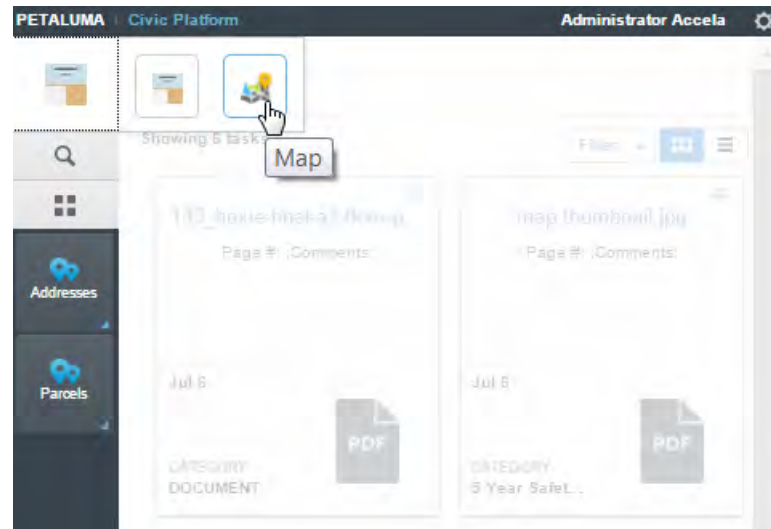
- 1: **Find an address or place.** Enter an address or place to move the map to that location. To learn more, see [Finding an Address or Place](#).
- 2: **Point, click, and see “what’s here”.** A context menu shows your selected map location’s address, coordinates, and all associated GIS objects. You can choose a GIS object and perform actions related to the GIS object or transactional records. To learn more, see [Selecting Map Features](#).
- 3: **Zoom in or out.** Alternatively, you can also zoom in by double-clicking, or using the mouse wheel. You can also pan the map by clicking on a spot and dragging the mouse.
- 4: **Reset** the map display to the Default extent, which is the initial extent or initial area shown on the map. The default extent is configured by the administrator of the map service provider.
- 5: **Locate** your (browser's) current location, **bookmark**, or navigate to a bookmarked map location. To learn more, see [Navigating to a Bookmarked or Browser Location](#).
- 6: **Choose a Basemap.** From the Basemap gallery panel, select a basemap which provides a geographical background for displaying GIS information.
- 7: **Customize the display of map layers.** To learn more, see [Map Layers](#).
- 9: **Measure an area, distance, or the geographic longitude/latitude location.** From the Measure panel, you can select which one to measure, and the unit of measure. Click the point(s) on the map to perform the measurement.
- 10: **Draw a line, shape, or text.** From the Draw panel, you can select a drawing tool, select color, style, and transparency, and see a preview. To learn more, see [Redlining and Annotating a Map](#).

- 11: **Print** the map into a PDF or another selected format. To learn more, see [Printing a Map](#).
- 12: See a **Pin Map** to view map locations using pin markers. This is the default view.
- 13: See a **Heat Map** to view map locations using gradient hotspots.
- 14: See a **Cluster Map** to view map locations using numbered dots to represent grouped locations. As you zoom into 1:2500 or below, the individually plotted locations display.
- 15: See the **map scale** or ratio of measurement on a map compared to the actual distance. The scale and unit of measurement is provided by the map service.
- 16: View the **Legend** to understand the map symbols, as provided by the map service.

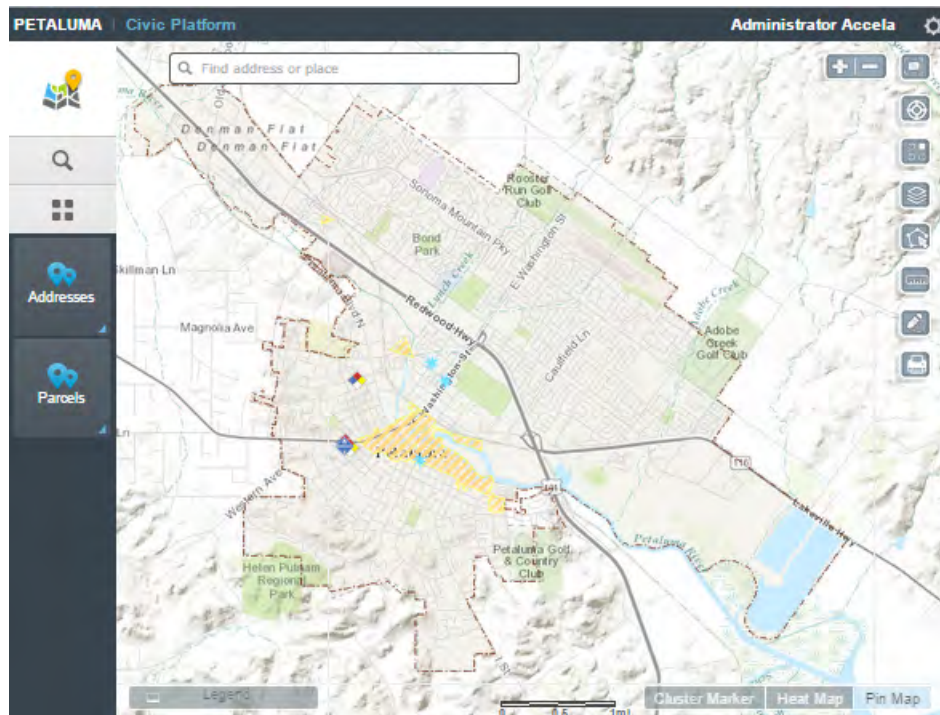
## The Map Dashboard

### Opening a Map Dashboard in Civic Platform

Civic Platform provides a Map dashboard to view a geographic display of Civic Platform records. To open the Map dashboard in Civic Platform, open the Dashboard toggle, and select Map:



The following diagram shows a sample Map dashboard:



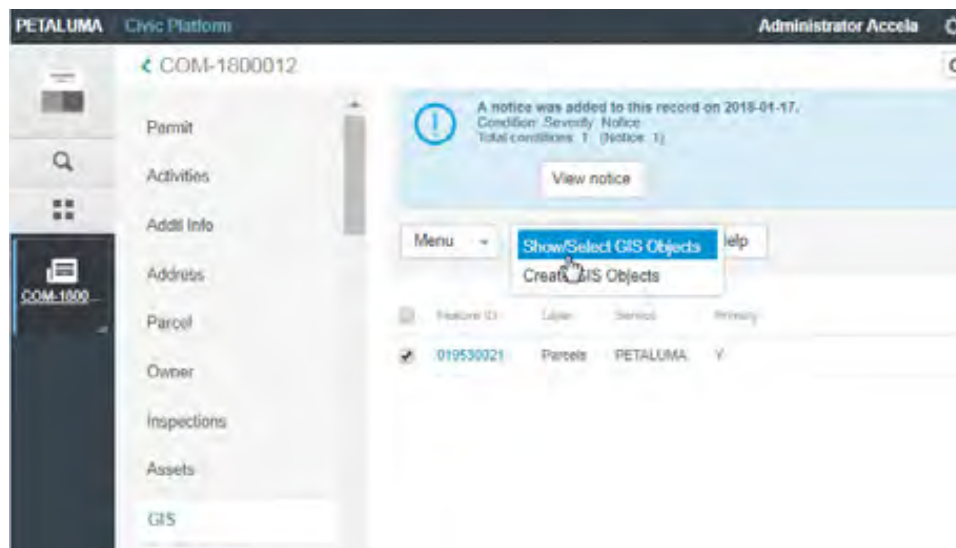
While working with records in Civic Platform, you can create and attach GIS objects to the current record. This allows anyone working with the record to geographically visualize the impact or extent of the transaction record within the agency's jurisdiction. For example, a permit clerk can draw the exact location of a new property including the extent of its environmental impact. The geographic data enhances the transaction record and can help with facilitating efficient and effective transaction workflows.

From the GIS section of a record detail, you can:



- Attach one or more existing GIS objects to the record:

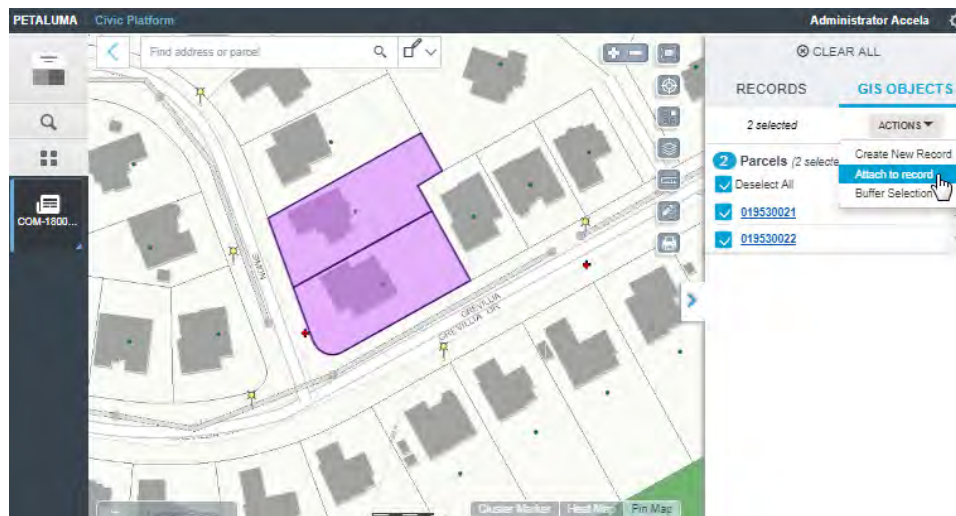
1. From the GIS menu, select **Show/Select GIS Objects**.



Civic Platform opens the map.

2. Navigate the map to find and select the map features you want to attach to the record.
3. Click the **GIS Objects** tab of the map Contents slide-out panel, and choose **Actions > Attach to Record**.

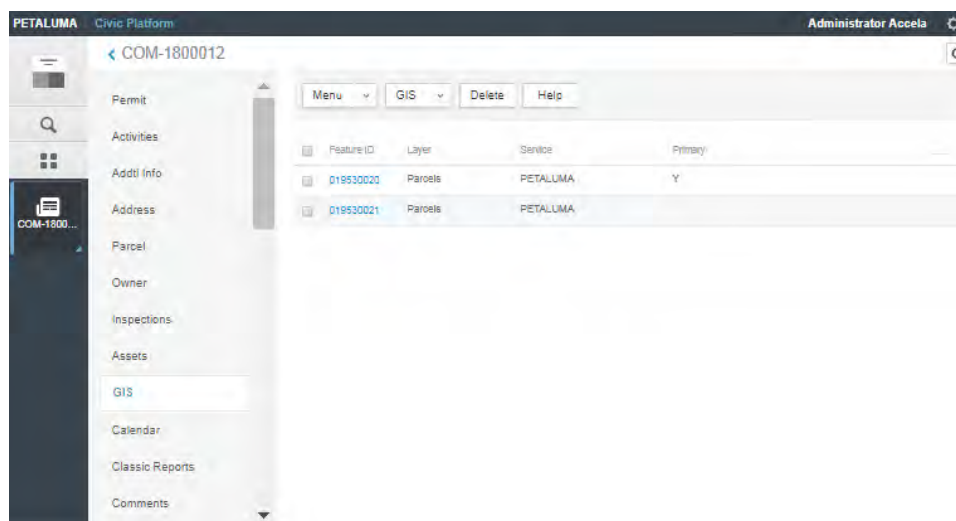
The following sample diagram shows two selected parcels to be attached to the current record:



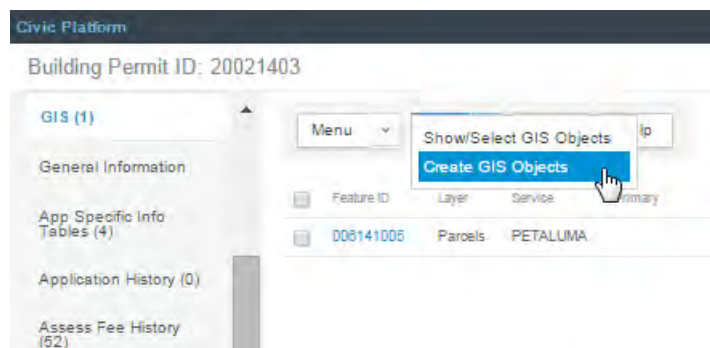
4. If you selected multiple GIS objects, Civic Platform prompts you to choose the primary GIS object. For example:



5. Click the < navigation link at the top left corner of the map to go back to the record detail. The GIS section shows the selected GIS objects that have been attached to the record. The following sample diagram shows the two selected parcels that are now attached to a record:

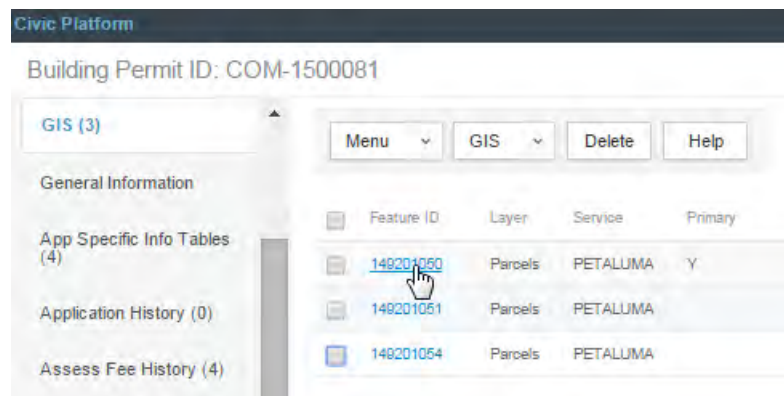


- Create a new GIS object before attaching it to the record:
  1. From the GIS menu, select **Create GIS Objects** to open the map.



2. Navigate the map to the location where you want to create a map feature. See [Creating and Editing Map Features](#).
- View a GIS object on the map:

From the list of map features on the GIS section, click the Feature ID of the GIS object you want to view. The map dashboard highlights the selected GIS object. For example:



Civic Platform

Building Permit ID: COM-1500081

GIS (3)

Menu GIS Delete Help

Feature ID	Layer	Service	Primary
149201050	Parcels	PETALUMA	Y
149201051	Parcels	PETALUMA	
149201054	Parcels	PETALUMA	

General Information

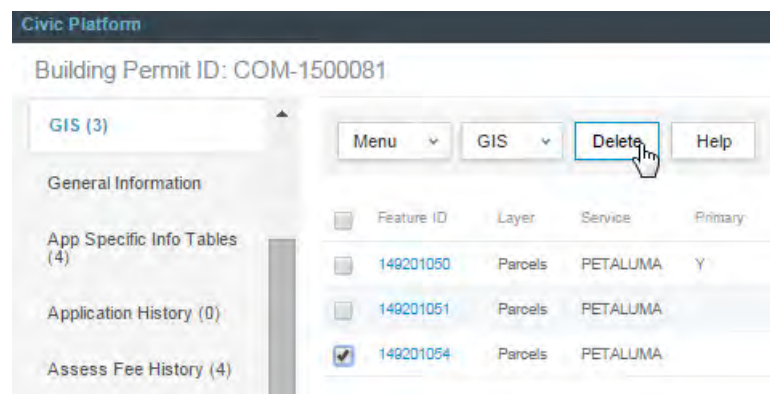
App Specific Info Tables (4)

Application History (0)

Assess Fee History (4)

- Detach a GIS object from the record:

From the list of map features on the GIS section, select the Feature ID you want to delete, and click **Delete**:



Civic Platform

Building Permit ID: COM-1500081

GIS (3)

Menu GIS Delete Help

Feature ID	Layer	Service	Primary
149201050	Parcels	PETALUMA	Y
149201051	Parcels	PETALUMA	
<input checked="" type="checkbox"/> 149201054	Parcels	PETALUMA	

General Information

App Specific Info Tables (4)

Application History (0)

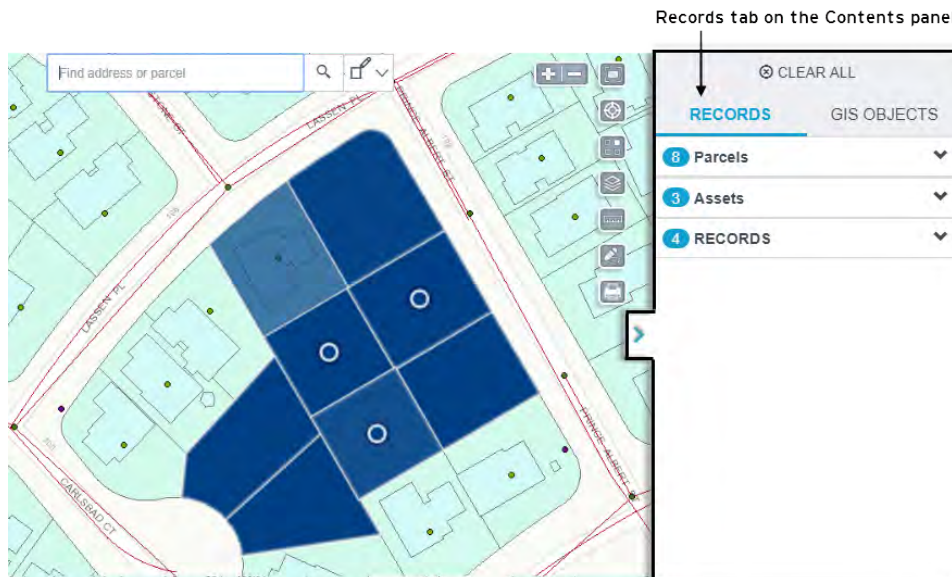
Assess Fee History (4)

## The Map Contents Panel

The map **Contents** panel shows reference and transactional records associated with the selected GIS objects on the map.

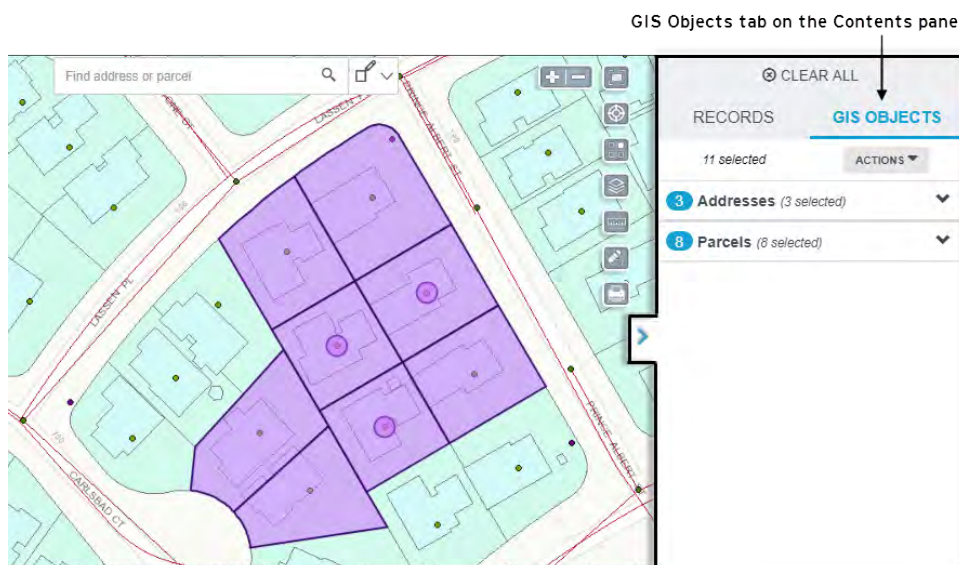
Accelea GIS provides various ways to [select GIS objects or features](#) on the map. When you select multiple GIS objects on the map, the Contents panel slides out on the right, and lists the related parcels, assets, and GIS objects on the following tabs:

- **Records** - Lists the parcels, assets, and transactional records that are associated with the selected GIS objects on the map:



This tab is refreshed when you select or de-select items on the **GIS Objects** tab or when you select more objects on the map. For details, see [Records on the Contents panel](#).

- **GIS Objects** - Lists the GIS objects or features that are selected on the map. The GIS objects are listed by the map layer they belong to:



If you select or de-select items from this tab, the lists of related parcels, assets, and records on the **Records** tab will be refreshed. For details, see [GIS Objects on the Contents panel](#).



**Note:** If you select more than 50 GIS objects on the map, the **GIS Objects** tab will list the selected GIS objects, and also prompt you to reduce your selection to 50 or less. When you have reduced your selection to less than 50, the **Records** tab becomes available and lists the reference and transactional records associated with your reduced selection.

### Records on the Contents panel

The **Records** tab shows an expandable/collapsible list of the parcels, assets, and transactional records associated with the selected GIS objects on the map:

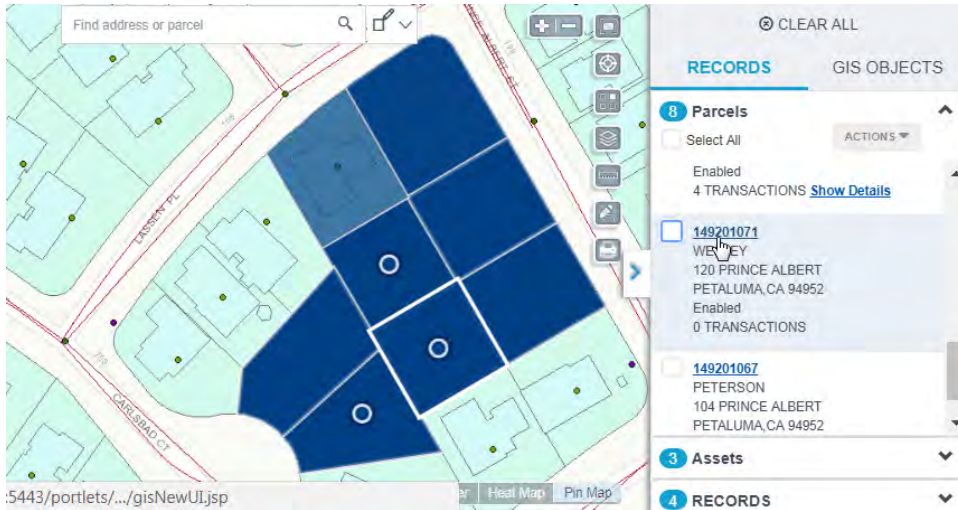


On the **Records** tab, you can:

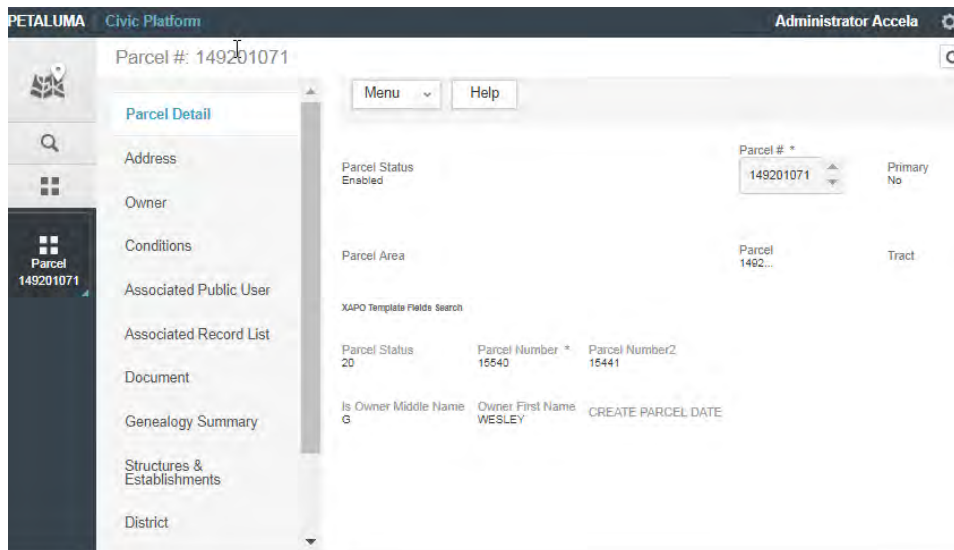
- Expand either **Parcels**, **Assets**, or **Records** to see the items under each type. You can see the number of parcels, assets, or records found with the selected GIS objects.  
The **Parcels** and **Assets** lists show the parcels and assets associated with the selected GIS objects. The **Records** list summarizes the records attached to the parcels and assets on the Records tab. Note that the **Records** list is a summarized listing of the records attached to the parcels and assets.
- View a summary about each item on the list. For the list of fields of fields displayed on each list, see [Summary information on the Records tab](#).
- Hover your cursor on an item to highlight it on the map:



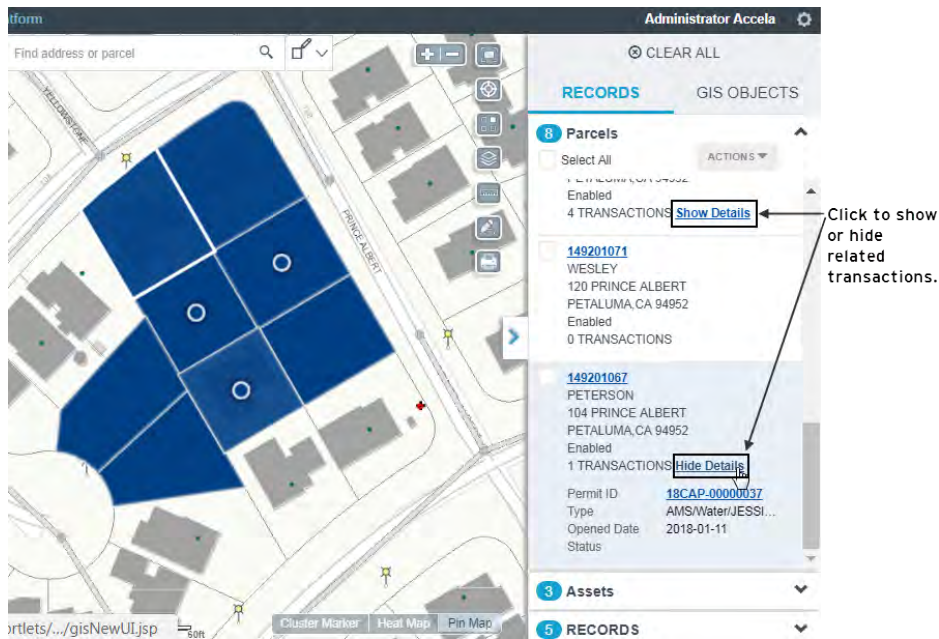
- Click an item link to see more details about the parcel, asset, or transactional record:



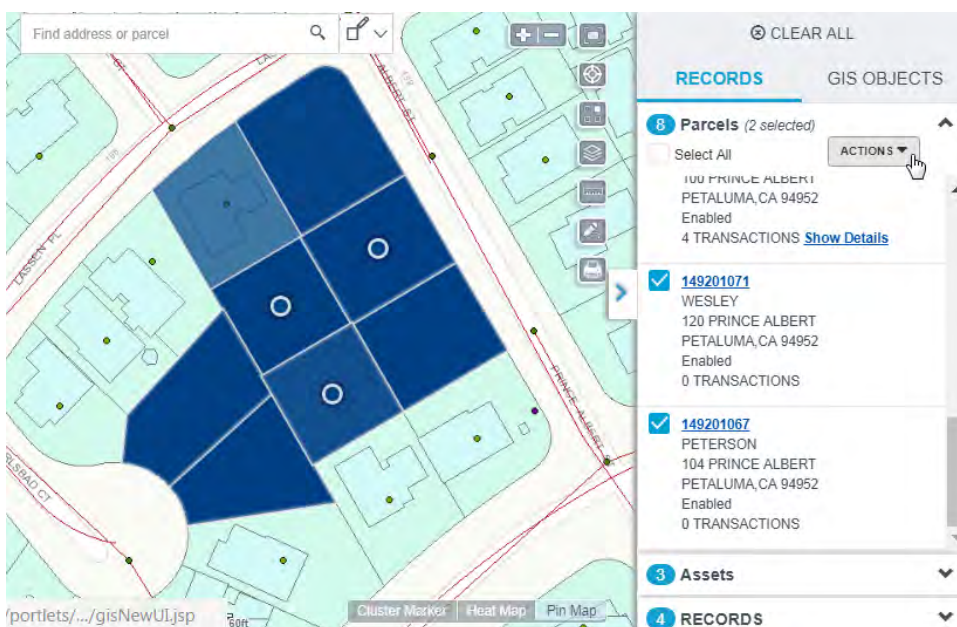
When you click an item link, it opens the detail page:




- If a parcel or asset has related transaction, click the **Show Details** link to expand a list of the related transaction records:



- Select items on the list, and choose an action to apply to your selection:

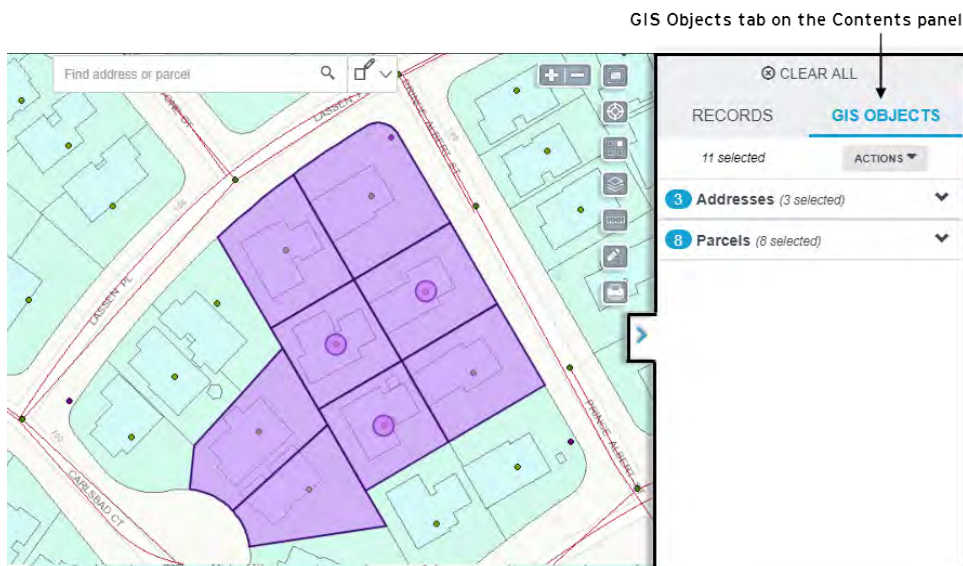



- Select or de-select all items on a specific list.

 **Note:** **CLEAR ALL** on top of the Contents panel clears all selections on both the Records and GIS Objects tabs.

### GIS Objects on the Contents panel

The **GIS Objects** tab shows an expandable/collapsible list of the selected GIS objects on the map. The GIS objects are grouped by their map layers:



 **Note:** If you do not see a map layer you are interested in, make sure the map layers you want to select GIS objects from are visible and selectable (by opening the **Layers** widget and checking the **VISIBLE** and **SELECTABLE** property of the map layers.)

On the **GIS Objects** tab, you can:

- Expand a map layer to see the selected GIS objects on that layer. You can see the number of GIS objects selected on each layer.



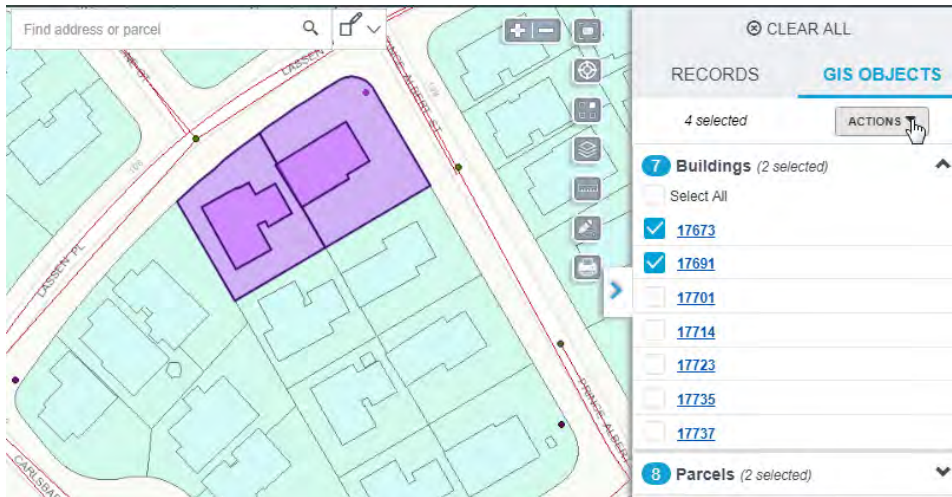
- Hover your cursor on a GIS object to highlight it on the map:



- Click a GIS object link to see more details about it:



- Select GIS objects, and choose an action to apply to your selection:



For the list of available actions, see the [GIS Object Actions](#).

- Select or de-select all GIS objects on a specific map layer.



**Note:** **CLEAR ALL** on top of the Contents panel clears all selections on both the Records and GIS Objects tabs.

### Summary information on the Records tab

The following fields are displayed on the Parcels, Assets, and Records lists on the **Records** tab of the **Contents** panel:

Parcels	<ul style="list-style-type: none"> <li>• Parcel ID</li> <li>• Parcel owner</li> <li>• Parcel address line 1</li> <li>• Parcel address line 2</li> <li>• Parcel status</li> <li>• Related transactions, if any</li> </ul>
Assets	<ul style="list-style-type: none"> <li>• Asset ID</li> <li>• Asset group</li> <li>• Asset type</li> <li>• Asset class type</li> <li>• Asset install date</li> <li>• Asset status</li> <li>• Related transactions, if any</li> </ul>

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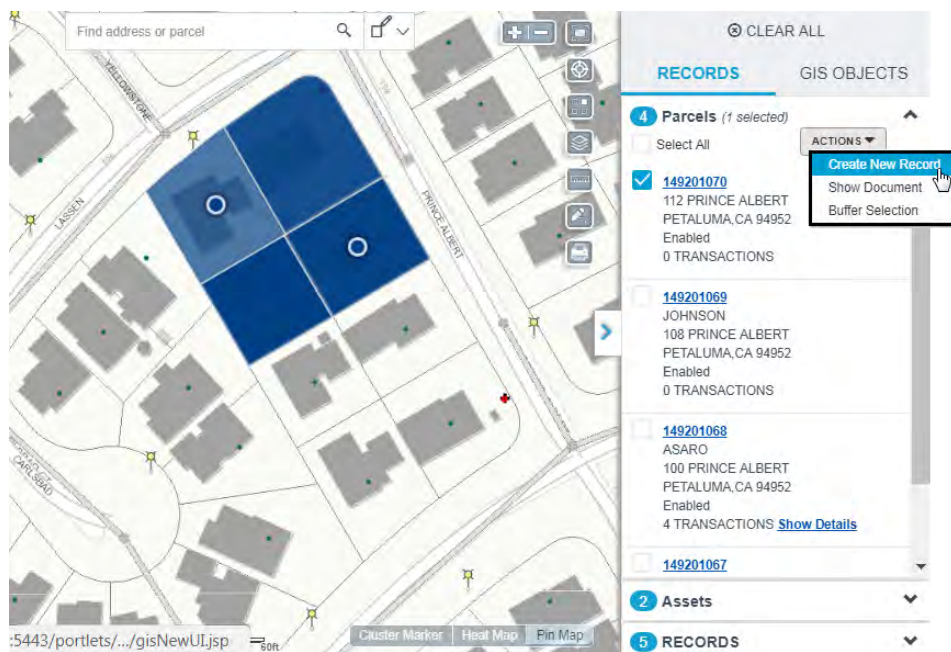
Records

- Record custom ID
  - Record opened date
  - Record type
  - Record address line 1
  - Record address line 2
  - Record status
-

## Map-based Actions

Acela GIS allows you to perform map-based transactions using the **Actions** menu on the map **Contents** panel. When you select an area on the map, you can quickly view related transactions and take actions within your current workflow.

On the Contents panel, the **Actions** menu becomes enabled after you select items on a list. The following diagram shows the **Actions** menu on the **Parcels** list:



This section provides a reference list of available actions for each list on the Contents panel.

### Addresses

- **Create New Record** - Opens the application intake form to allow you to submit a new record using the selected addresses.
- **Show Documents** - Opens the document list for the selected addresses.

### Assets

- **Create a Work Order** - Creates a single work order for all of the selected assets.
- **Create Multiple Work Orders** - Creates separate work orders for each of the selected assets.

### Parcels

- **Create New Record** - Opens the application intake form to allow you to submit a new record using the selected parcels.
- **Show Documents** - Opens the document list for the selected parcels.
- **Buffer Selection** - Selects GIS objects within a specified radius distance from the selected parcels.

## Records

- **Create Inspections** - Opens the inspection intake form to allow you to schedule inspections using the selected records.
- **Show Documents** - Opens the document list for the selected records.

## GIS Objects

- **Create New Record** - Opens the application intake form to allow you to submit a new record using the selected GIS objects. If you selected multiple GIS objects, you will be prompted to select the primary GIS object to be associated to the new record.

For related configuration information about enabling auto-population of address, parcel, and GIS object information into a record, see *Civic Platform Configuration Guide* > Configuring and Enabling APO and XAPO Features.

## Locating Places

---

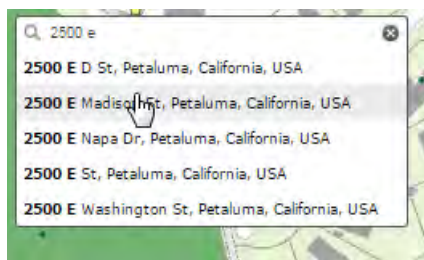
### Topics:

- [Finding an Address or Place](#)
- [Finding parcels on the Civic Platform map](#)
- [Clicking a location on the Civic Platform map](#)
- [Navigating to a Bookmarked or Browser Location](#)
- [Geo-locating Records](#)

### Finding an Address or Place

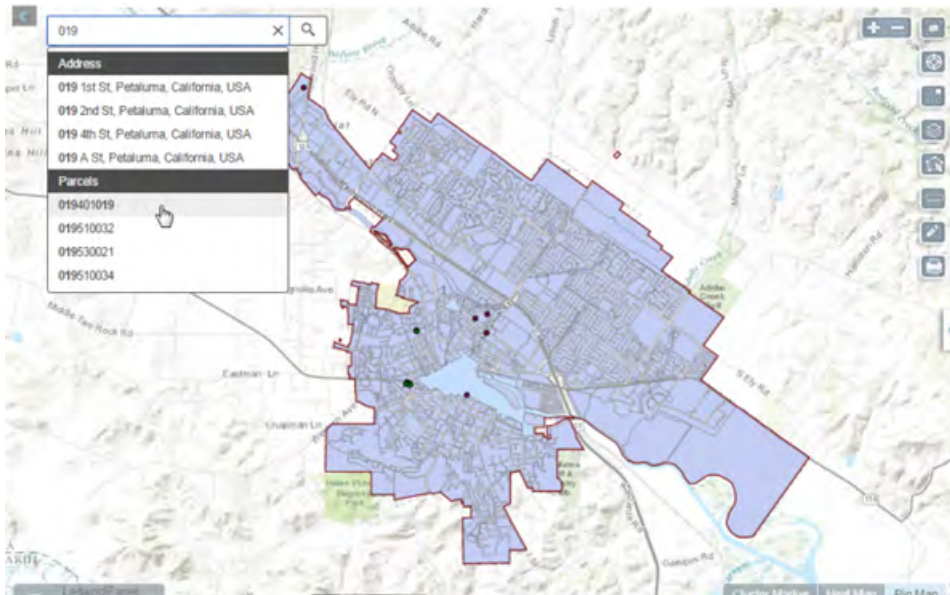
To find an address or place, enter the address or place on the Finder box. Civic Platform GIS will automatically list locations that match your entry on a drop-down list. You can select an item from the list or finish typing the complete address and press Enter (or click the Search icon). Civic Platform GIS zooms to the selected location. Click **X** to clear the Finder and start another search.

The following diagram shows a sample address entry on the Finder:

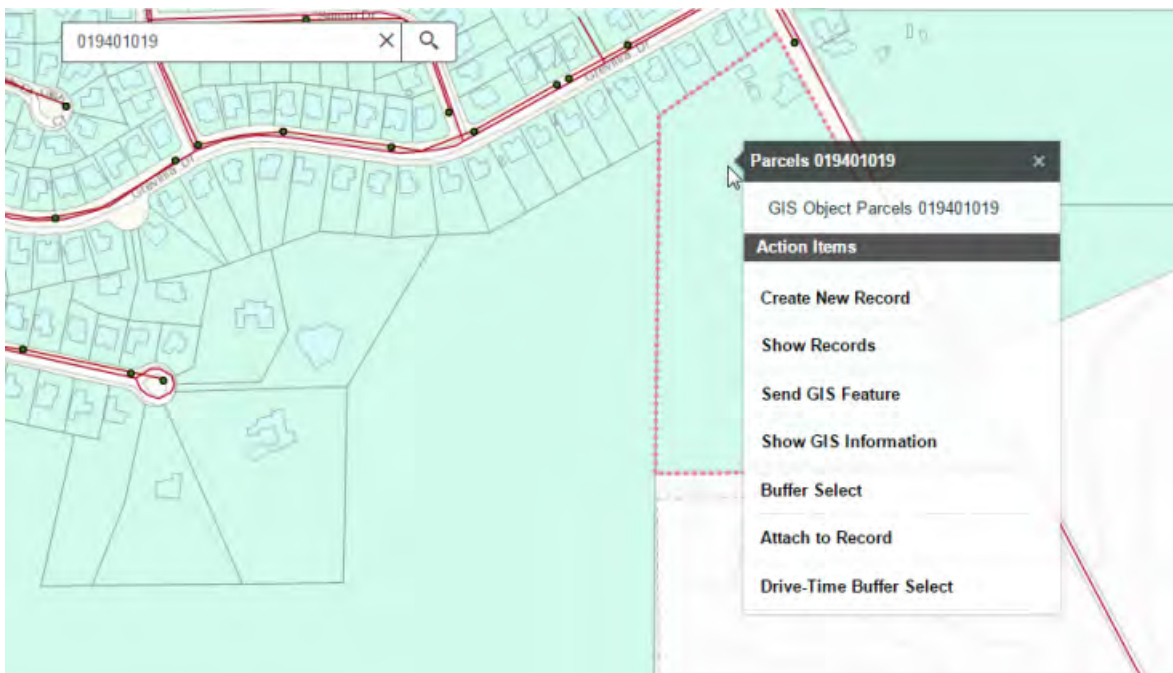


### Finding parcels on the Civic Platform map

To search for a specific parcel on a Civic Platform map, type a parcel ID on the search box. As you type the parcel ID, Civic Platform GIS lists suggested addresses and parcel IDs. You can either enter a full parcel ID or select the parcel ID from the result list.



When Civic Platform GIS matches the parcel ID, the map zooms to the parcel, displays a map marker on the parcel, and highlights the parcel. You can click the parcel to see the GIS information and action panel:



### Clicking a location on the Civic Platform map

When a user clicks on the map, JavaScript GIS searches the Civic Platform database for GIS objects on the clicked location.


- If multiple GIS objects are found on the clicked location, the What's Here menu shows the found address, its x-y coordinates, and a summary count of the GIS objects:



From the list of GIS objects, a user can select a GIS object and perform any of the available actions on the selected object.

- If only a parcel exists on the clicked location:
  - The parcel is highlighted, and the GIS information and action panel is displayed.
  - If the user clicks on a line between two parcels, both will be highlighted and both will be listed in the GIS information panel.
- If a parcel does not exist on the clicked location, the geocoding address is used and the parcel associated with the geocoding address is shown.
- If an address is not found on the clicked location, only the x-y coordinates are shown.
- The x-y coordinates on the clicked location currently cannot be used to perform any action. Due to this limitation, the "Drop Pin" functionality on the What's Here menu has been removed in JavaScript GIS 9.0.0 to avoid confusion.

## Navigating to a Bookmarked or Browser Location

To navigate to a bookmark or your current browser's saved location, click the Bookmark icon . The following diagram shows a sample Locate Me panel:



On the Bookmark panel, you can:

- 1: Navigate and zoom into a bookmarked location. An existing bookmark cannot be updated. To update it, delete the existing bookmark and add a new bookmark for the new location.
- 2: Delete a bookmark.
- 3: Bookmark the current location.
- 4: Navigate and zoom into your browser's current location.




## Map Layers

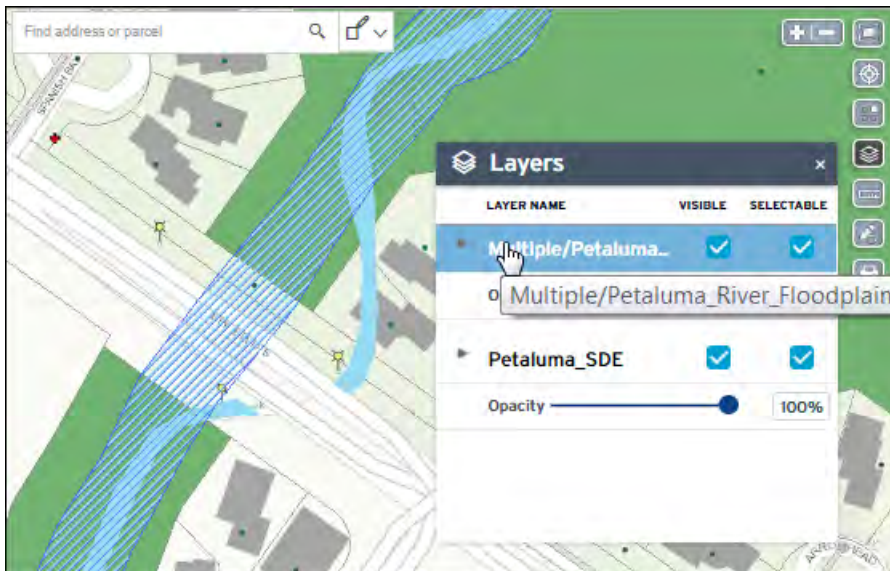
A map view consists of multiple layers from a map service or a mash-up of multiple map service providers. For example, a single map view can have separate layers for geographic features, city streets, hydrants, street lights, parcels, and others. The administrator configures the default map layers that are available, visible, and editable by user group members.


Depending on the permission settings defined for the user group you belong to, you can customize the visibility of the map layers according to your workflow needs. For example, if you want to only see the fire hydrants, you can show only the Hydrants layer and hide the other layers, or you can show all layers and move up the Hydrants layer and adjust the transparency so you can see their proximity to other GIS objects.

The **Layers** widget to allow map users to easily set the visible and selectable attributes of the map layers.

### Visible and Selectable Map Attributes

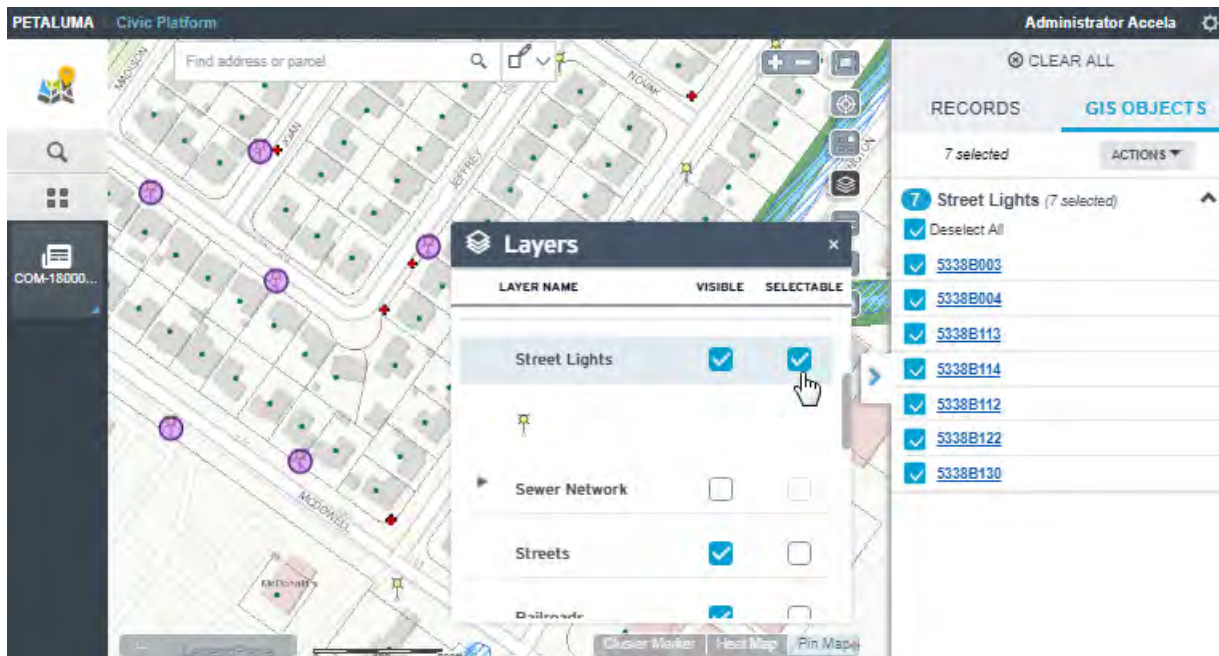
The **Layers**  widget is a handy tool that shows the various map services and layers on the map. When a user clicks the **Layers** widget for the first time, the Layers widget displays the map services the user has access to, and whether they are visible or selectable. The following sample Layers widget shows the sample Multiple/Petaluma\_River\_Floodplain and Petaluma\_SDE map services, which the logged-in map user has access to:



 **Note:** If a map service name is truncated because it is too long, hover your mouse over the map service name to see its full name.

On the list of map services, the user can expand a map service to see its map layers. The Layers widget allows users to control their map view by setting the visible or selectable attributes of the map layers. This is especially helpful when selecting or editing multiple GIS objects on map service mash-ups.

For example, a street light inspector might want to see and update the street lights within a particular area, relative to address and street locations. Although he wants to see the street lights, streets, and addresses, he is only interested in inspecting street light GIS information. In this scenario, the inspector can set the Street Light layer as visible and selectable, and all other layers as visible only. With these settings, when he selects an area covering the street lights he needs to inspect, only the street lights are selected and displayed on the **GIS Objects** tab of the map Contents panel:



**Note:** If there are parcels and assets associated with the selected GIS objects, they will be listed on the **Records** tab of the map Contents panel.

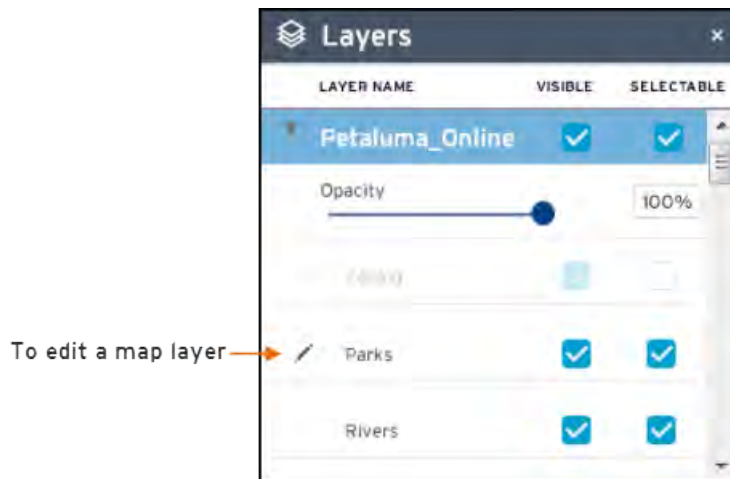
On the **Layers** widget, a user can:

- Expand or collapse the hierarchical list of map services and map layers.
- Toggle the **VISIBLE** checkbox to show or hide a map service or layer.
  - The current visibility of a map layer depends on its configured visibility scale on the map service. If the map is not currently zoomed at the configured scale dependency, the map layer on the Layers widget is disabled. When the user zooms into a visible scale, the map layer along with the VISIBLE and SELECTABLE checkboxes become enabled.
- Un-checking the VISIBLE checkbox for a *map service* hides all of its map layers. However, changing the VISIBLE checkbox for a map service (or a parent map layer) does not change the VISIBLE checkboxes of the children map layers.
 

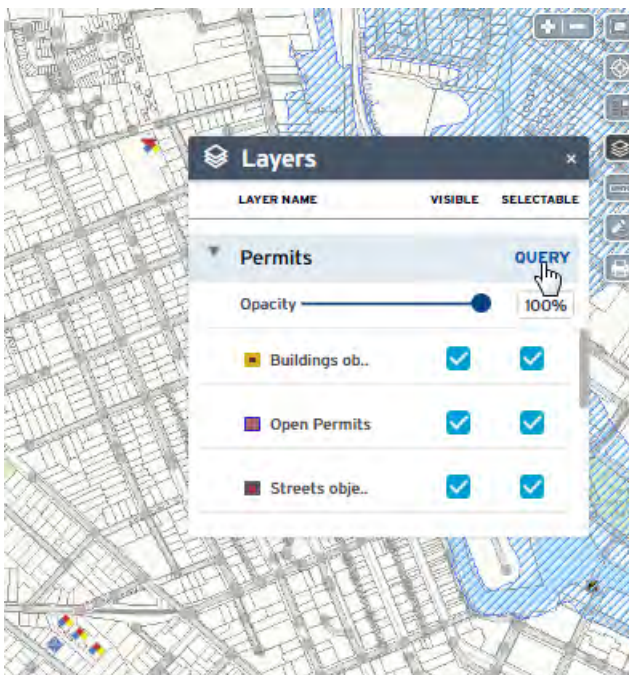
The VISIBLE checkbox settings for children map layers persist to allow a user to easily toggle the setting at the parent level and adjust it at the individual level only if necessary. (Let's say a map service has at least 20 layers, a user can just toggle the visibility at the map service level and avoid having to un-check/re-check at least 20 checkboxes.)
- Un-checking the VISIBLE checkbox automatically un-checks the SELECTABLE checkbox. A map service or layer is selectable *only* if it is visible.
- Re-checking the VISIBLE checkbox does not automatically re-check the SELECTABLE checkbox because a visible layer is not necessarily selectable. A user must explicitly make a map layer selectable.
- Toggle the **SELECTABLE** checkbox to allow or disallow GIS object selection on the map service or layer.
  - Un-checking the SELECTABLE checkbox for a map service unselects all of its map layers. However, changing the SELECTABLE checkbox for a map service (or a parent map layer) does not change the SELECTABLE checkboxes of the children map layers.

The **SELECTABLE** checkbox settings for children map layers persist to allow a user to easily toggle the setting at the parent level and adjust it at the individual level only if necessary. (Let's say a map service has at least 20 layers, a user can just toggle the selectable at the map service level and avoid having to un-select/re-select at least 20 checkboxes.)

- If the **VISIBLE** checkbox is un-checked or a map layer is not visible at the current zoom level, the **SELECTABLE** checkbox is disabled.
- Move the **Opacity** slider under a map service to adjust its opacity (100%) or transparency (0%).
- Edit a map layer.
- If a user has edit permissions on a map layer, a pencil icon appears next to the layer name.



- For details about how to edit a map layer, see [Creating and Editing Map Features](#).
- Run a **QUERY** if a map service contains layers that have been configured with a dynamic theme query. The following example shows the **QUERY** link for the Permits map service containing dynamic theme queries for the Buildings objects, Open Permits, and Street objects map layers:



The GIS administrator configures the map service permissions and the initial settings of the **VISIBLE** and **SELECTABLE** attributes for the Default or any named GIS user group. For details about granting permissions to map layers, see *Configuring Accela GIS > Product Integrations > User Groups > Map Layer Settings in Accela GIS Administrator Guide*.


**Related Information**[Selecting Map Features](#)[Creating and Editing Map Features](#)

## Selecting Map Features

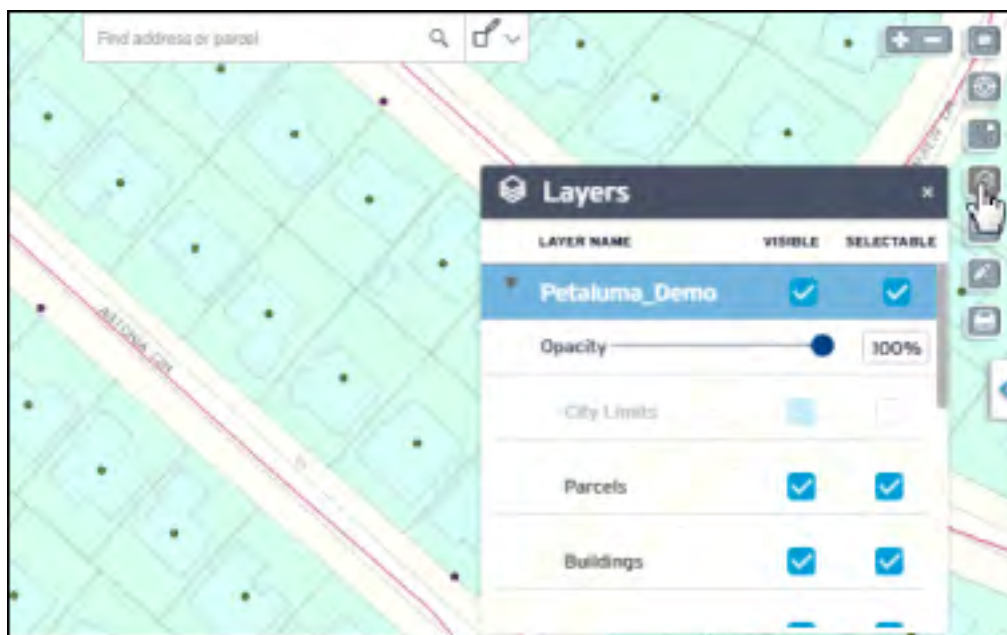
### Topics:

- [Selectable map layers](#)
- [Single Map Selection](#)
- [Multiple Map Selections](#)

### Selectable map layers

You can select GIS objects on map layers that are visible and selectable. The visible and selectable map layer attributes are initially configured by the GIS administrator on the GIS Administration site, and you (as a map user) can also enable and disable these attributes on the **Layers**  widget.

The following **Layers** widget shows that the user has permissions to the sample Petaluma\_Demo map profile containing the Parcels and Buildings map layers, which are marked as visible and selectable.



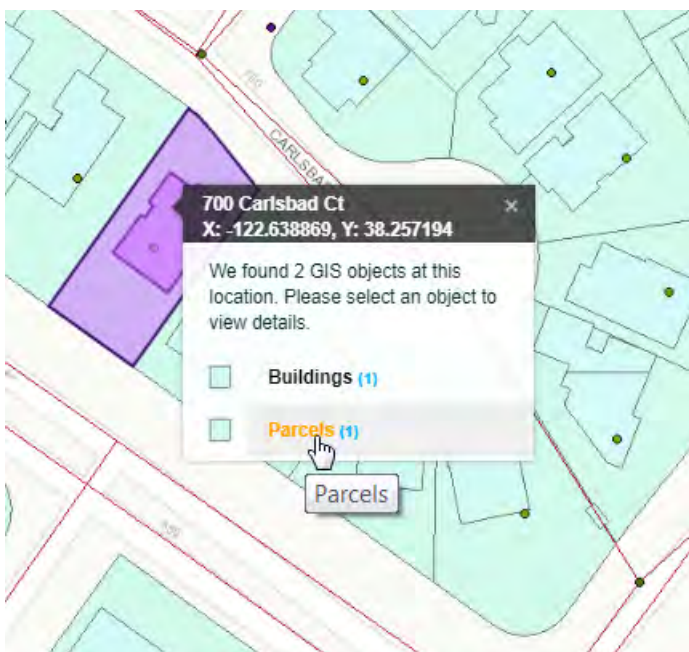
### Single Map Selection

Accelea GIS shows GIS features and transactional information found on any location you click on the map. While you are navigating and analyzing an area of interest on the map, you can click on a map location to select it and to see what is at that location.



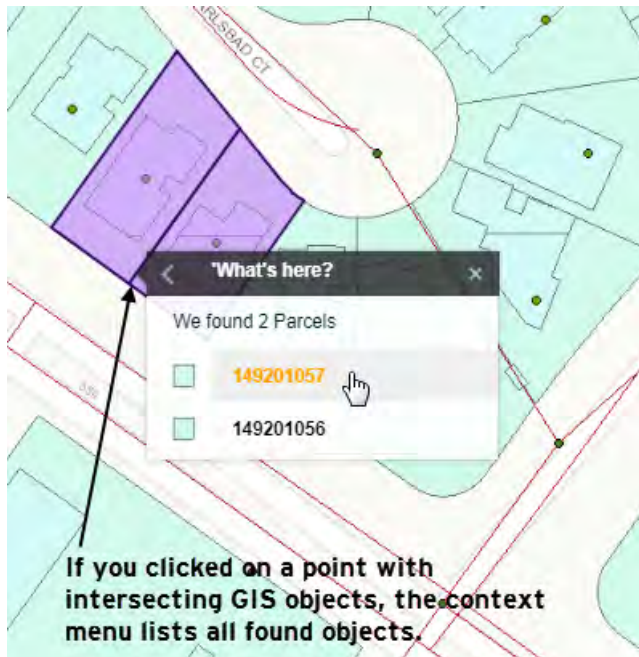
**Note:** To have the ability to select GIS objects on the map, make sure the map layers you want to select GIS objects from are visible and selectable. See [Selectable map layers](#).

The following example shows a selected map location:



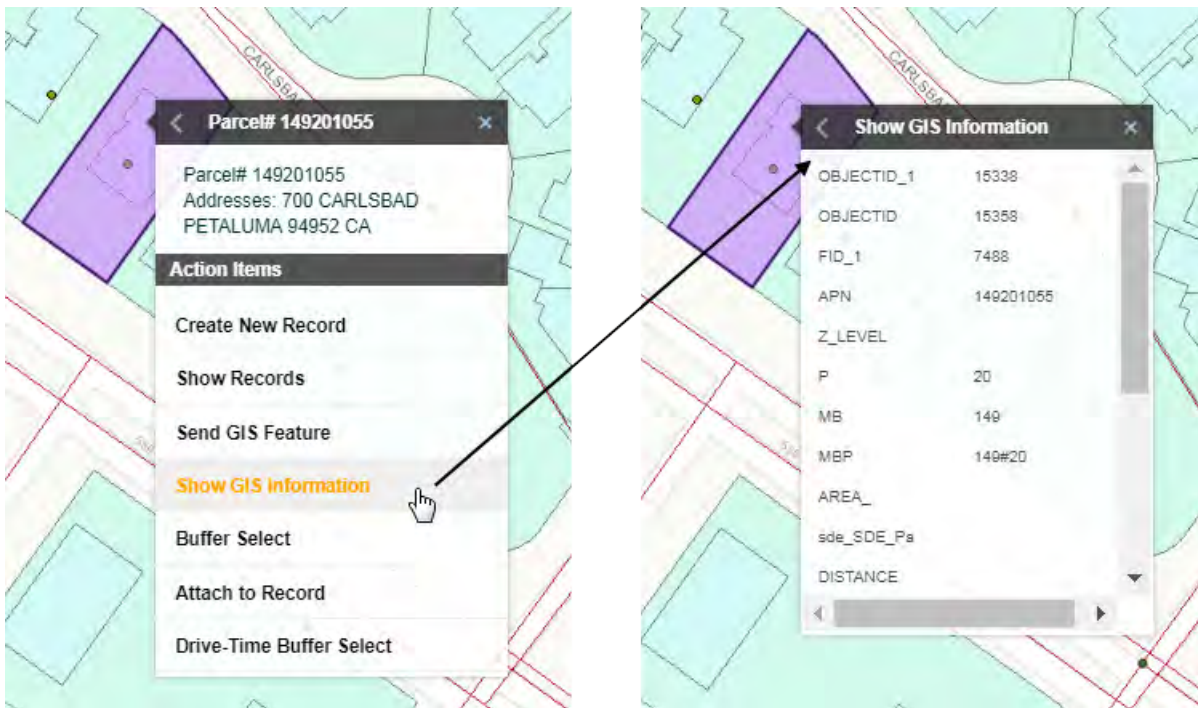
The context menu shows the location's address, x and y coordinates, and all the GIS objects found on that map location. The context menu uses the GIS legend symbols used on the map, and indicates how many GIS objects for each type were found. In this example, the user is interested in seeing the parcel information, and clicked the found **Parcels** line item.

When you select a map layer (for example Parcels), the **What's Here** menu shows the GIS object IDs found on that layer. If multiple GIS objects are found, for example, if you clicked on a point that intersects several parcels, the **What's Here** menu lists all the intersecting parcel IDs, as shown below:



Select the object ID to see the actions that can be applied on that GIS object.

From the list of object IDs, you can select an The following example illustrates the **Show GIS Information** command from the **Action Items** menu, and the GIS information for the selected parcel:



## Multiple Map Selections

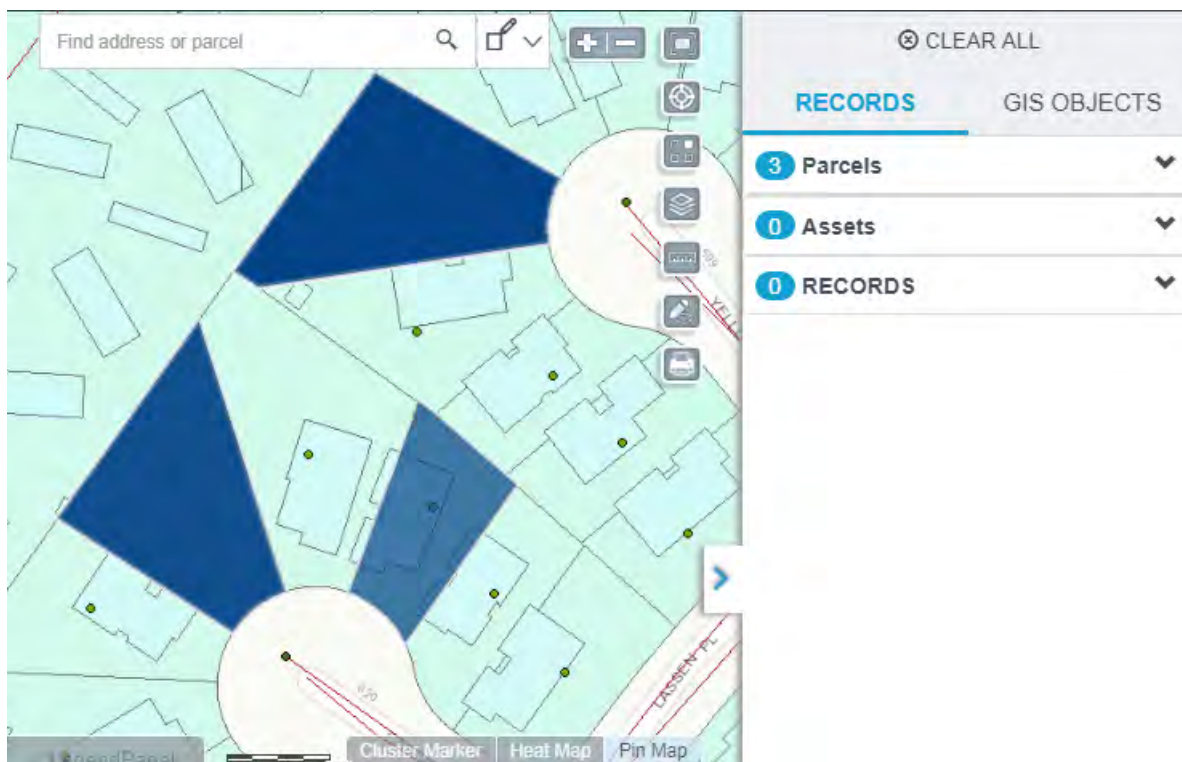
You can select multiple map locations and see their GIS features and related transactional records. For multiple map selections, Accela GIS displays all selected GIS features, related transactional records, and drill-down information along with action commands on a slide-out [Contents panel](#).

**Note:** To have the ability to select GIS objects on the map, make sure the map layers you want to select GIS objects from are visible and selectable. See [Selectable map layers](#).

- [Selecting Non-Contiguous Locations](#)
- [Using the Map Selection Tool](#)
- [Distance Buffer Selection](#)
- [Drive-Time Buffer Selection](#)

## Selecting Non-Contiguous Locations

Press and hold the Shift key while you click on multiple map locations. The following diagram shows three non-contiguous parcels that have been selected using the Shift key:



On the **Records** tab of the slide-out panel, expand the record type (**Parcels**, **Assets**, or **Records**), and hover the cursor on a line item to highlight the object on the map. Click the **GIS Objects** tab to see the list of GIS object ID(s) and apply an action on selected object ID(s).

## Using the Map Selection Tool

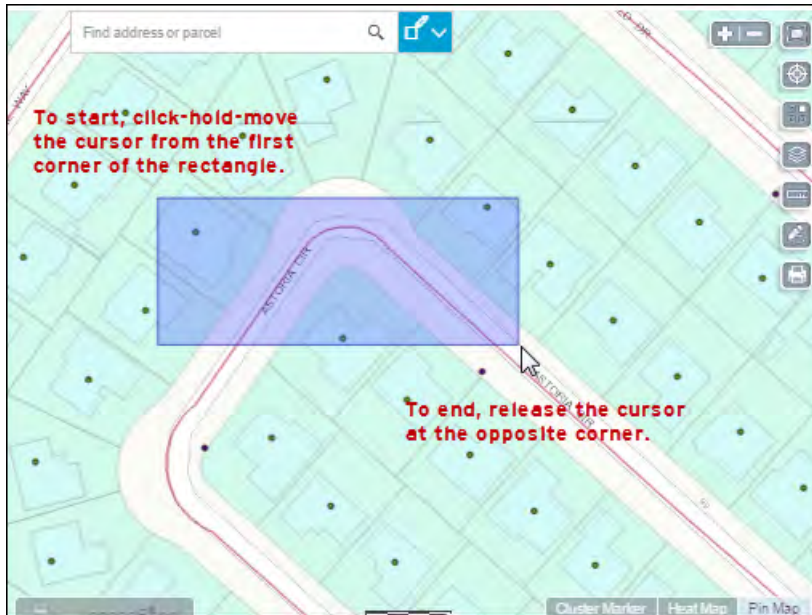
The map selection tool allows users to select GIS objects across map layers by rectangle, polygon, or polyline:



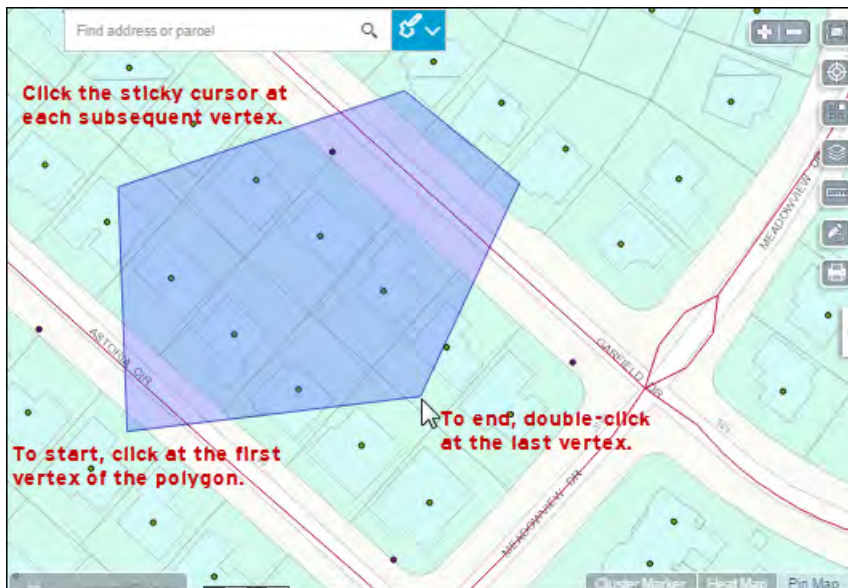
Using the map selection tool, users can select GIS objects on the visible and selectable map layers. The map selection tool provides the following options:



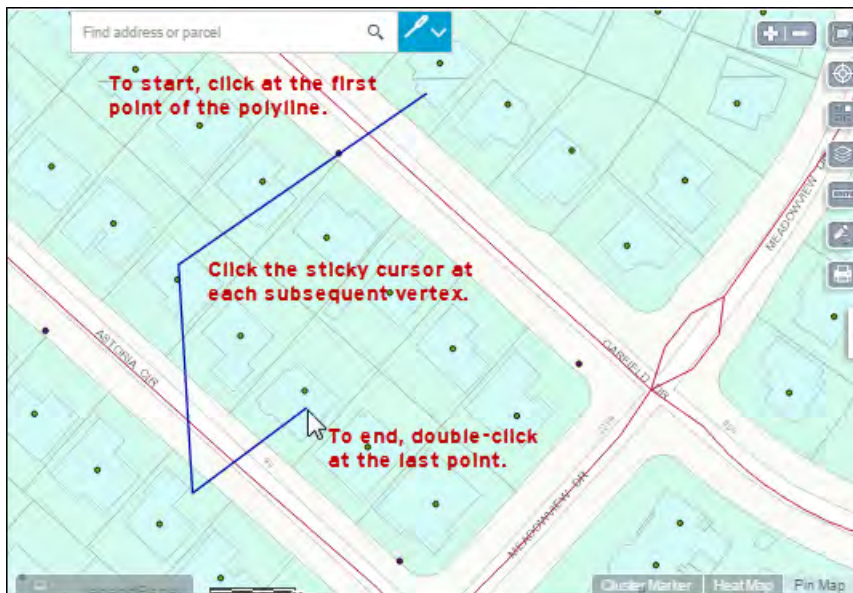
- **Select by rectangle** - Selects GIS objects inside and intersecting the rectangle.





- **Select by polygon** - Selects GIS objects inside and intersecting the polygon.



- **Select by polyline**- Selects GIS objects intersecting the polyline.



## Tips on using the map selection tool


- A highlighted selection tool (  ), indicates that the map view is in selection mode. To exit the selection mode, click the selection tool to unhighlight it (  ).
- If a user wants to choose another area to make a selection using the **Select by rectangle** tool, exit the selection mode, and pan the map to a different area.
- A user can select up to 1000 GIS objects (from all layers). When the selection tool selects more than 1000 GIS objects, a message notifies the user to reduce the number of selected objects.

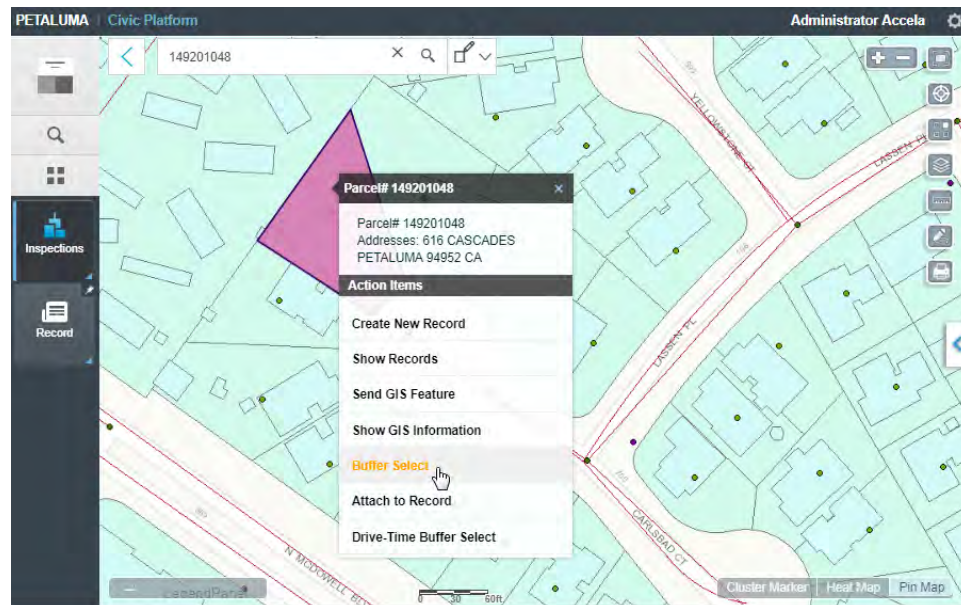
## Distance Buffer Selection

Another way to select multiple locations on a map or query map features is to select a distance buffer. A distance buffer allows you to define an area around a selected point, line, or polygon feature so that all GIS objects located within the area are automatically selected. Distance buffer selection only applies to a single map layer.

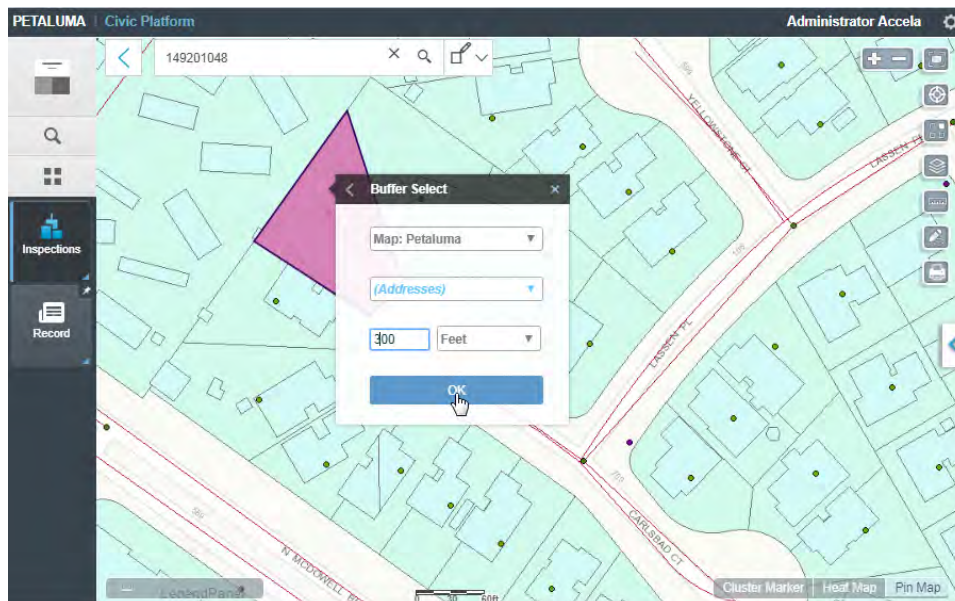
For example, if you want to send a notification to the property owners that live within 300 feet of a certain parcel, click on that parcel and then define a distance buffer to automatically select all parcels within a 300 foot radius.

### To select multiple GIS objects using a distance buffer

1. Click a point on the map, and select a GIS object. Your selected location acts as the center point of your distance buffer.
  -  **Note:** You can also perform a distance buffer selection from the **Actions** menu on the **Records** panel when you are plotting parcels.
2. On the next window, choose **Buffer Select**.



3. On the **Buffer Select** window, enter your distance buffer selection:



#### Map Service

The default map service displays. If more than one map service is configured, you can choose another map service from the drop-down list.

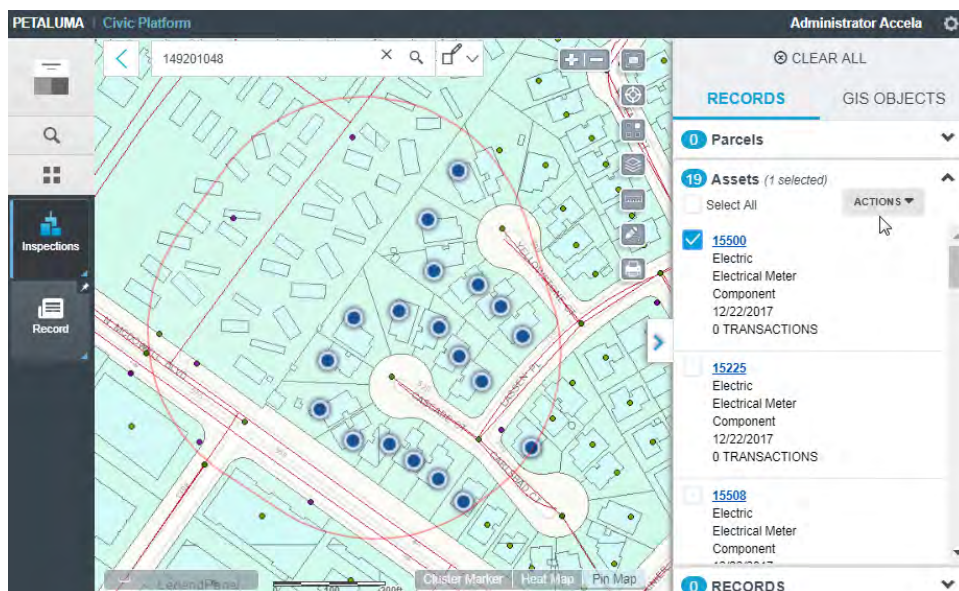
#### Map Layer

The map layer containing the objects you want to include in the distance buffer.

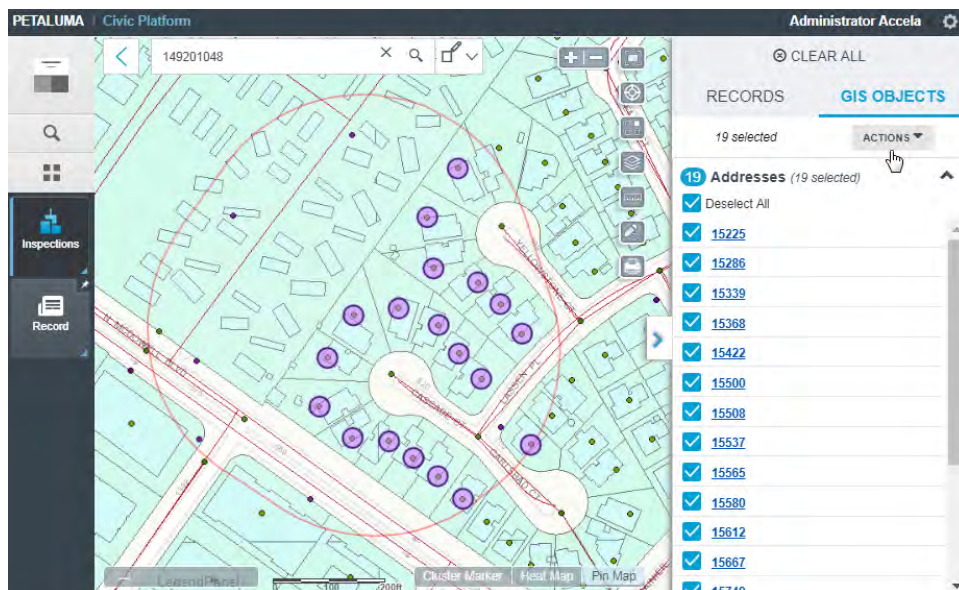
#### Distance

The length around the point or map feature you clicked on. Enter the distance and unit of measure.

The buffer selection result shows the records and GIS objects that match the buffer distance criteria. The following diagram shows the **Records** tab which lists parcels, assets, and records that match the buffer selection:



The following diagram shows the GIS Objects tab which lists the GIS objects that match the buffer selection:



From the Buffer Selection panel on the right, you can select records or GIS objects, drill-down to get more details, or choose an action to perform.

## Drive-Time Buffer Selection

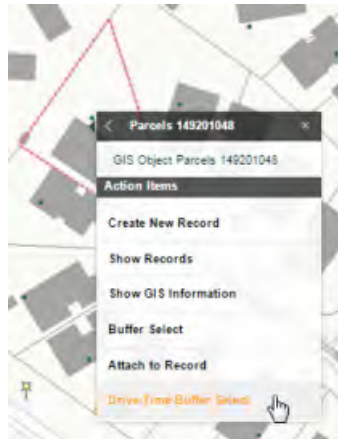
A user can query map features by defining a drive-time buffer which is an area that can be reached within a specified number of minutes. Drive-time buffer selection only applies to a single map layer.

 **Note:** This feature is only available with the ArcGIS Online map service.

### To select multiple GIS objects using a distance buffer

1. Click a point on the map, and select either a found GIS object or the Use Location menu option. Your selected location acts as the starting point of your drive-time buffer.

2. On the next window, choose **Drive-Time Buffer Select**.




3. On the Drive-Time Buffer Select window, enter your drive-time buffer selection:

<b>Map Service</b>	The default map service displays. If more than one map service is configured, you can choose another map service from the drop-down list.
<b>Map Layer</b>	The map layer containing the objects you want to include in the distance buffer.
<b>Minutes</b>	The number of driving minutes from the point or map feature you clicked on. The driving time is calculated by the map service based on speed limit and street network.

## Creating and Editing Map Features

The layer editing tool on the **Layers** widget allows you to create or modify map features to accurately match actual geographic objects on the map. For example, if a public works maintenance worker recently installed a sign above a traffic light, you can add a map feature to represent the sign at its exact location. After a map feature has been created or modified, you can add it to the GIS database and attach it to a new or existing transaction record.



 **Note:** To allow a map user to edit a map layer, a GIS Administrator must grant the user **Edit Permissions**. For configuration details, see *Configuring Accela GIS > Product Integrations > User Groups > Map Layer Settings* on *Accela GIS Administrator Guide*.

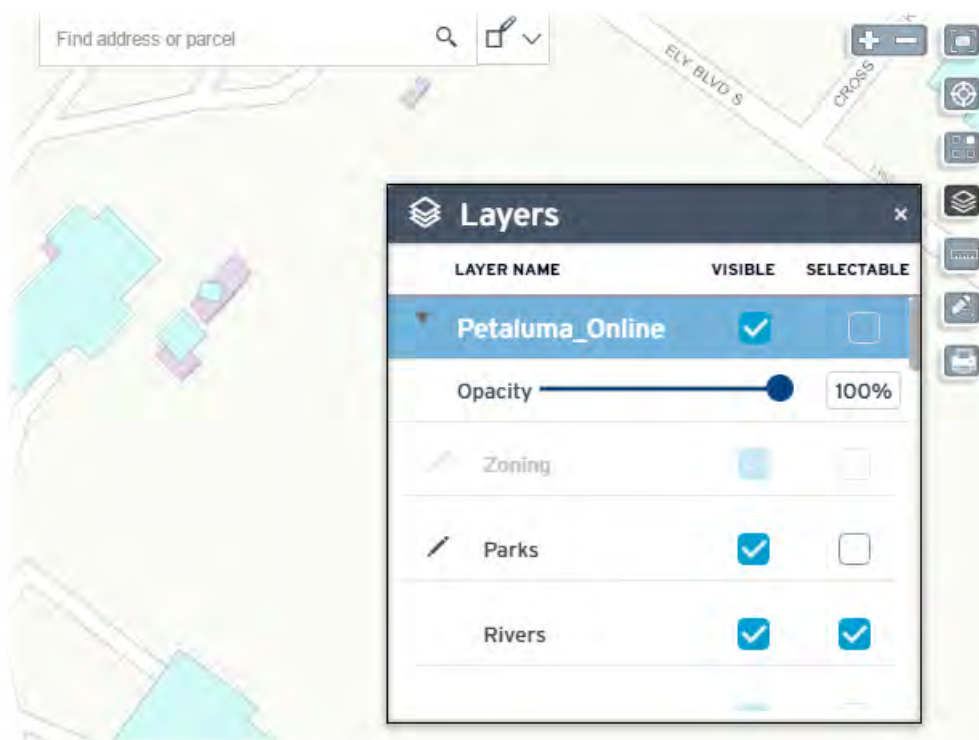
### Topics:

- [Editing a layer](#)
- [Adding a GIS Object](#)
- [Editing a GIS Object](#)
- [Editing Tips](#)


### Editing a layer

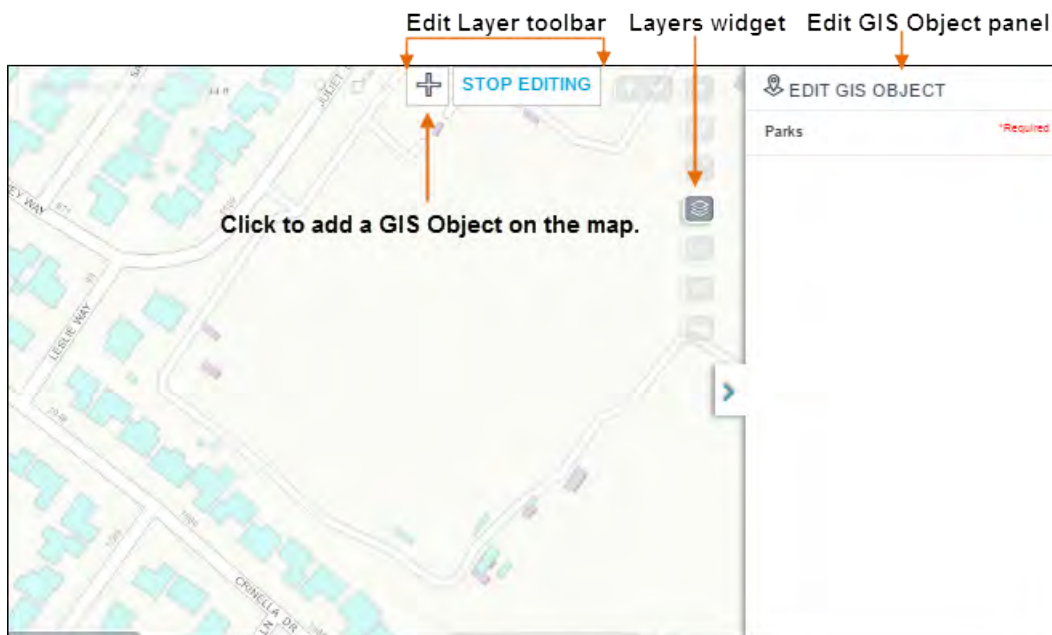
The layer editing tool opens a selected map layer in an edit layer session during which the user can add or update GIS object drawings and attributes.

The layer editing tool icon  appears next to the layer name if the map is zoomed at a visible scale, and if the user has permission to edit the map layer. The following sample Layers widget shows  next to the **Parks** map layer, which is visible and editable by the logged-in user:



**Note:** In the above example, the Zoning layer has a pencil icon because the user has permission to edit it. However the Zoning layer is disabled because it is not visible at the current zoom level. The Rivers layer does not have a pencil icon because the user does not have permissions to edit that layer.

To edit a layer, click the  icon next to the map layer. The edit layer session displays the Edit Layer toolbar, Layers widget, and Edit GIS Object panel:




The edit layer session disables the Search box, selection tool, zoom control, and the other map widgets. The edit layer session also resets the **GIS Objects** panel. After you stop an edit layer session, the GIS Objects panel shows only the new or updated GIS object(s) on the map layer that was just edited. This GIS Objects panel (that is displayed after an edit layer session ends) does not show GIS objects that were previously selected before you started the edit layer session.

## Adding a GIS Object

To add a GIS object to a map layer:

1. Start a layer edit session:

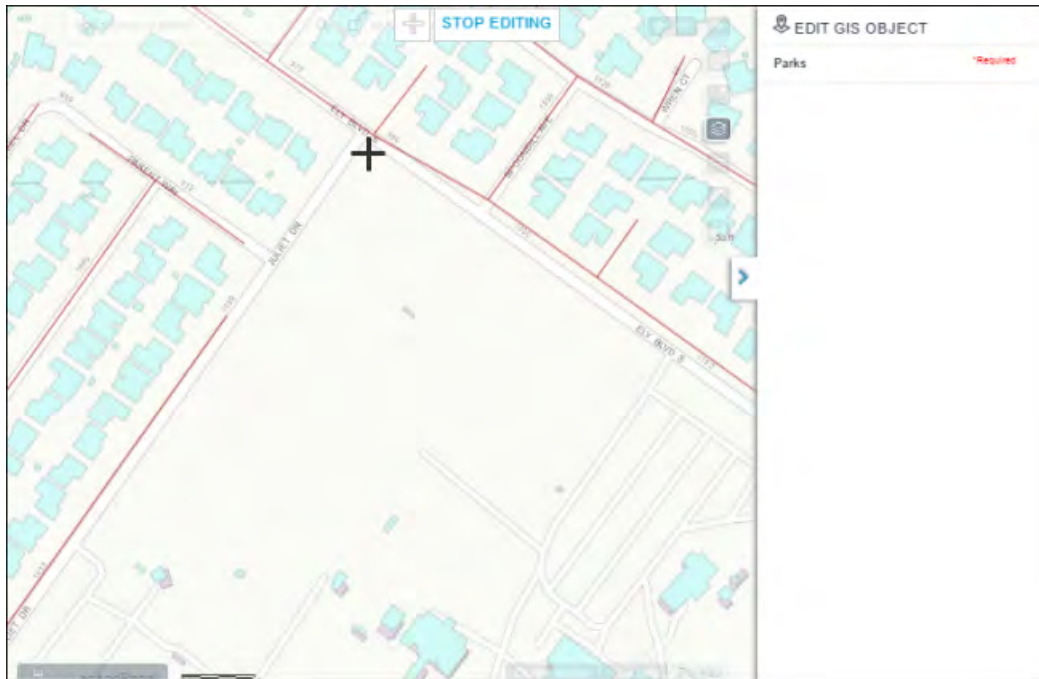
a. Click  to open the Layers widget.

b. Click  next to the map layer you want to edit.

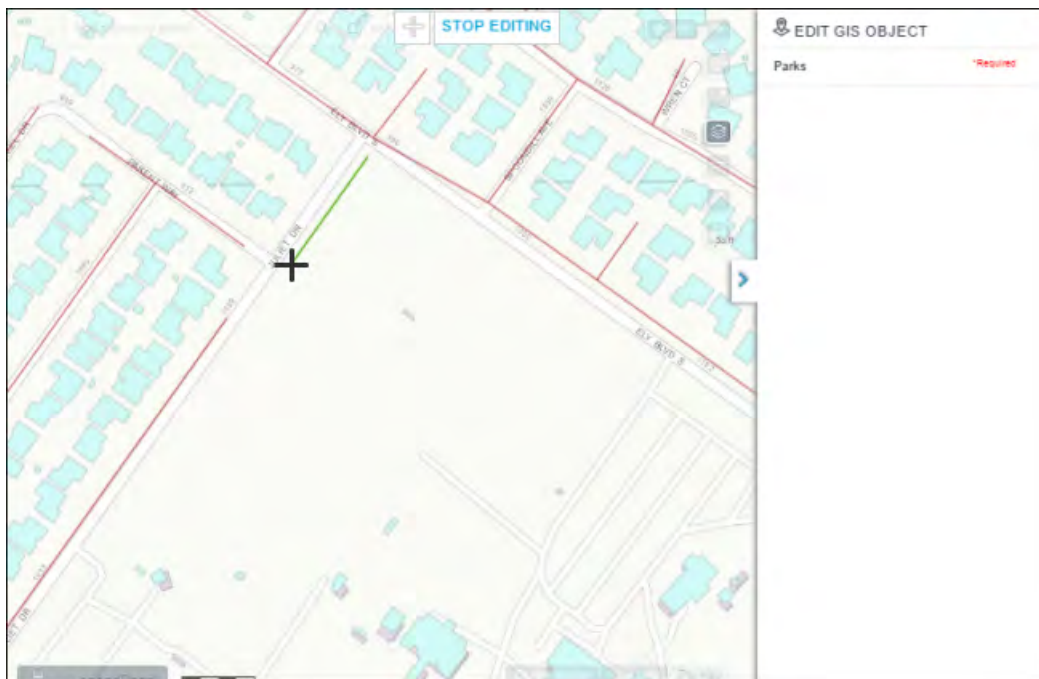
**Note:** If you do not see the pencil icon, you do not have edit permissions on the layer. If the pencil icon is disabled, zoom into a visible scale.

2. Click  on the Edit Layer toolbar. The cursor displays as the + symbol and becomes a "sticky" cursor.

3. To start drawing, click the + cursor at the first point of the GIS object on the map.

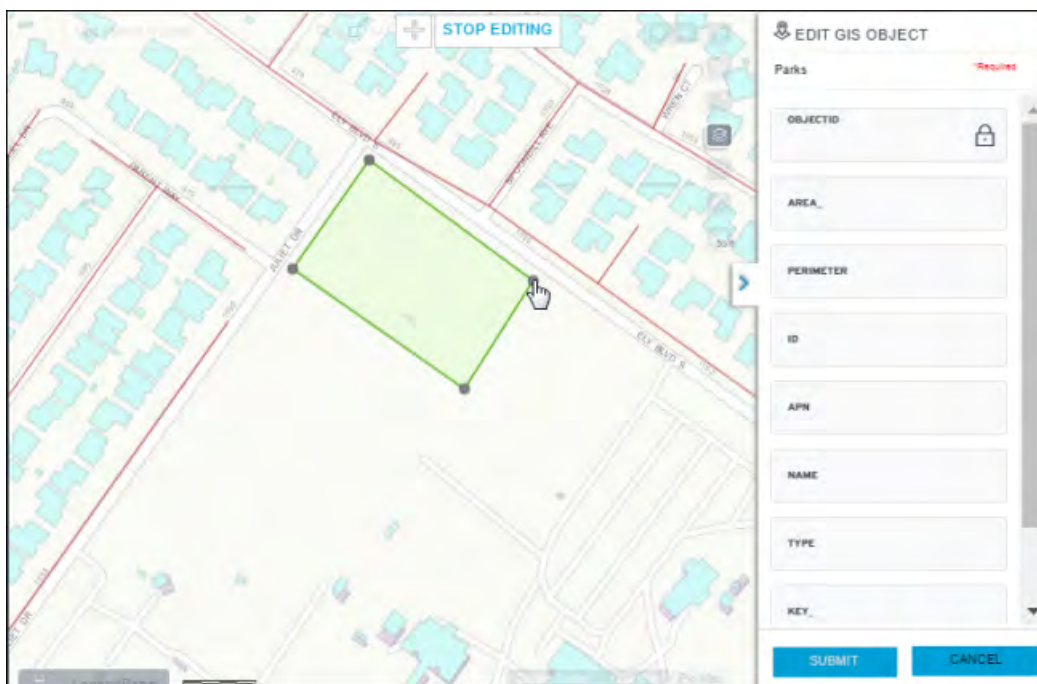


4. Click the + sticky cursor at each subsequent vertex of a polygon or polyline.

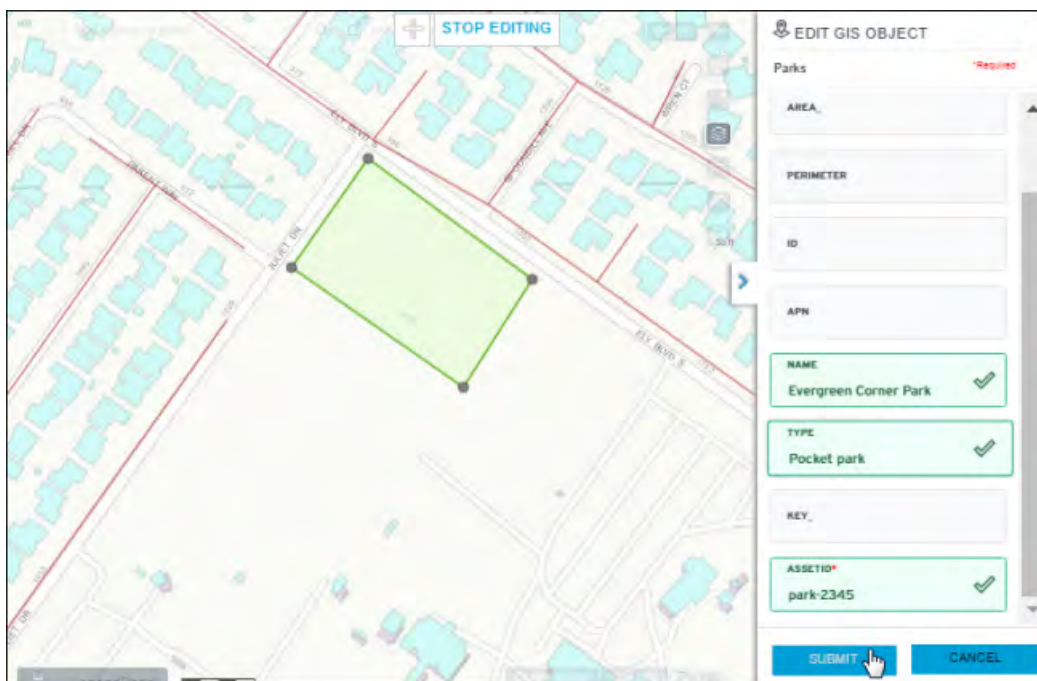


5. To end the drawing, double-click at the last vertex.  
The new GIS object is highlighted, and the **Edit GIS Object** panel displays the GIS object attributes.





6. On the **Edit GIS Object** panel, enter the GIS object attribute values. The required fields are indicated with a red asterisk.



The **Edit GIS Object** panel validates required fields and data formats. A field entry that passes validation is highlighted as green, and a field that fails validation is highlighted as red.

If any field failed validation, the Edit GIS Object panel displays the message "**n error(s) found. Click to fix**" where **n** is the number of validation errors. For example:

EDIT GIS OBJECT

Streets \*Required

△ 2 error(s) found. Click to fix.

TOADDR

TEXT\_ID

PRE\_DIR

ST\_NAME

ST\_TYPE

SUF\_DIR

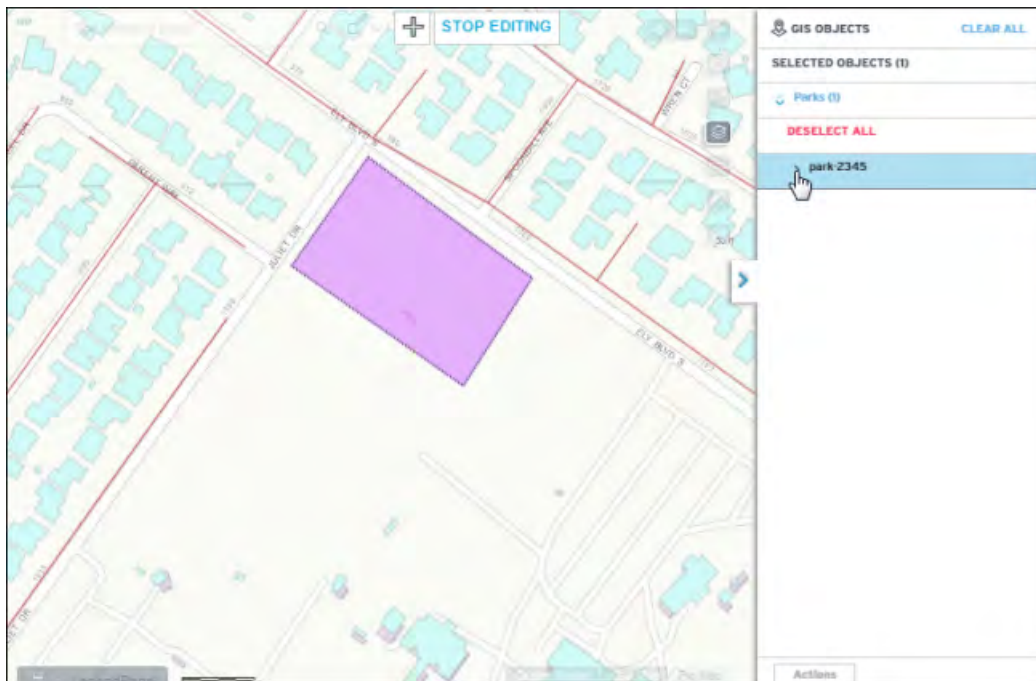
L\_ZIP


R\_ZIP


SUBMIT CANCEL

To jump to the first field with the validation error (and avoid scrolling), click the message "***n* error(s) found. Click to fix.**" After fixing the error, you can click the message again to jump to the subsequent validation error. The Submit button is disabled until all field entries are valid.


7. Click **Cancel** on the **Edit GIS Object** panel to cancel any un-submitted drawing and attribute values. The Cancel button removes the un-submitted GIS object from the map and the Edit GIS Object panel. You will be prompted to confirm the cancellation of unsaved GIS objects in the edit layer session.
8. Click **Submit** to save the GIS object in the map service.  
Once the transaction is complete, the **Edit GIS Object** panel slides out, and the new GIS object is shown on the **GIS Objects** panel.




9. Optionally, click the  icon again to add another GIS object. After finishing a GIS object drawing and data entry, click **Submit** to save the GIS object in the map service.

 **Note:** Only one GIS object can be submitted at a time. However, multiple transactions can be submitted during an edit layer session.

10. Click the **STOP EDITING** button on the Edit Layer toolbar to exit the edit layer session and view the new GIS object on the map, along with other map


 **Note:** If **STOP EDITING** is clicked without submitting the last GIS object data entry or drawing, the user will be prompted to discard any changes or to resume the edit layer session.

 **Note:** After you stop editing, the **GIS Objects** panel shows only the new or updated GIS object(s) on the map layer that was just edited. This GIS Objects panel does not show GIS objects that were previously selected before you started the edit layer session. Any subsequently selected GIS objects will be appended to the GIS Objects panel.


## Editing a GIS Object

To edit an existing GIS object on a map layer:

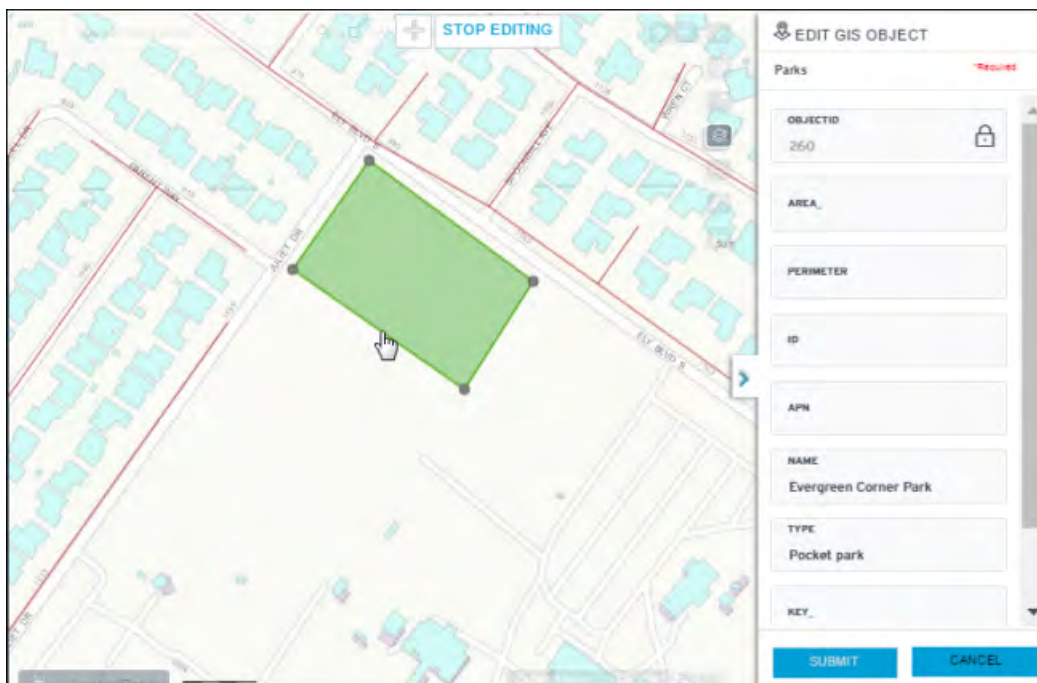
1. Start a layer edit session:

- a. Click  to open the Layers widget.

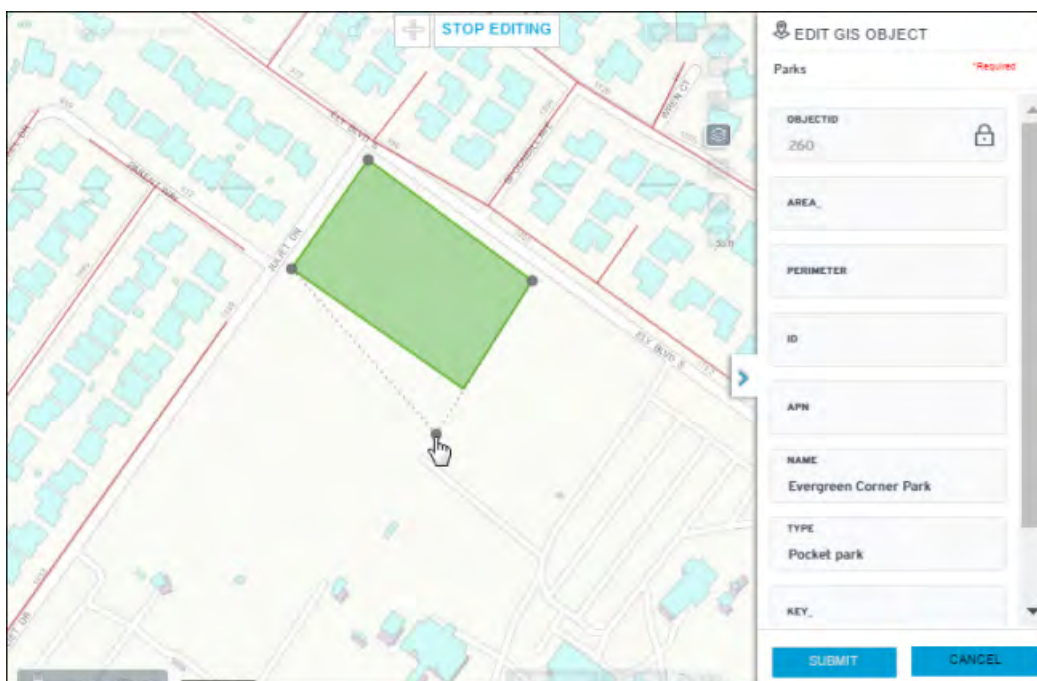
- b. Click  next to the map layer you want to edit.


 **Note:** If you do not see the pencil icon, you do not have edit permissions on the layer. If the pencil icon is disabled, zoom into a visible scale.

- Click the GIS object to be modified. The vertices on the GIS object appear, and the **Edit GIS Object** panel shows the GIS object attributes.

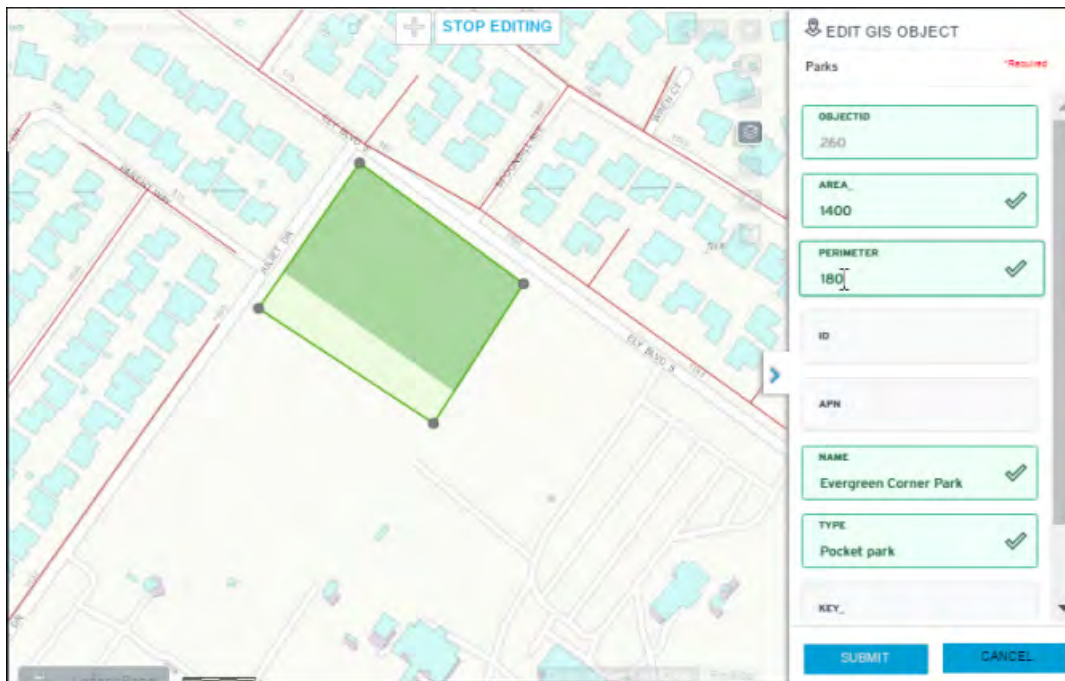


- To change the shape of an existing GIS object, click and drag the vertices.



 **Note:** A vertex cannot be added nor deleted from an existing GIS object.

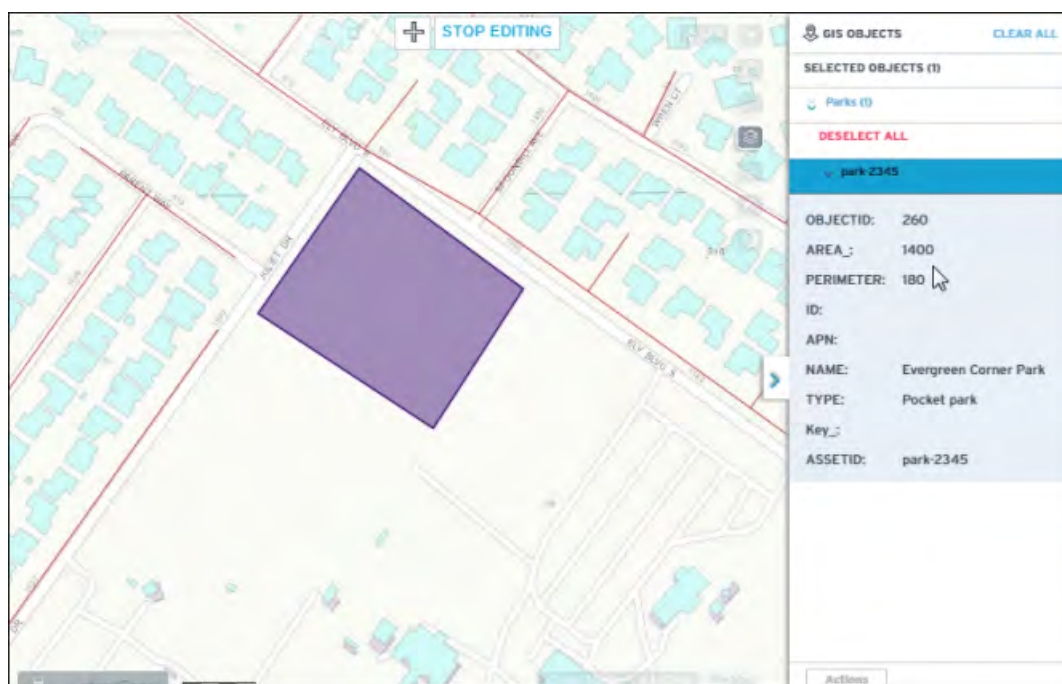
- Modify GIS object attribute values on the **Edit GIS Object** panel as needed.





The **Edit GIS Object** panel validates required fields and data formats. A field entry that passes validation is highlighted as green, and a field entry that fails validation is highlighted as red. Multiple validation errors are listed at the top of the Edit GIS Object panel. The user can click an error message on the list to jump to the field with the validation error. The **Submit** button is disabled until all field entries are valid.


5. Click **Cancel** on the **Edit GIS Object** panel to cancel any un-submitted modifications on the drawing and attribute values. The Cancel button reverts the GIS object back to its previously saved state, including its drawing and attributes. You will be prompted to confirm the cancellation of unsaved GIS objects in the edit layer session.
6. Click **Submit** to save the GIS object in the map service.

Once the transaction is complete, the **Edit GIS Object** panel slides out, and the new or updated GIS object is shown on the **GIS Objects** panel. You can view the GIS object properties to review your modifications.




 **Note:** The GIS Objects panel above only shows the map layer that was edited. It does not show GIS objects that are selected from other map layers.

7. Optionally click the  icon again to add another GIS object. After finishing a GIS object drawing and data entry, click **Submit** to save the GIS object in the map service.

 **Note:** Only one GIS object can be submitted at a time. However, multiple transactions can be submitted during an edit layer session.

8. Click the **STOP EDITING** button on the Edit Layer toolbar to exit the edit layer session and view the modified GIS object on the map, along with other map


 **Note:** If **STOP EDITING** is clicked without submitting the last GIS object data entry or drawing, the user will be prompted to discard any changes or to resume the edit layer session.

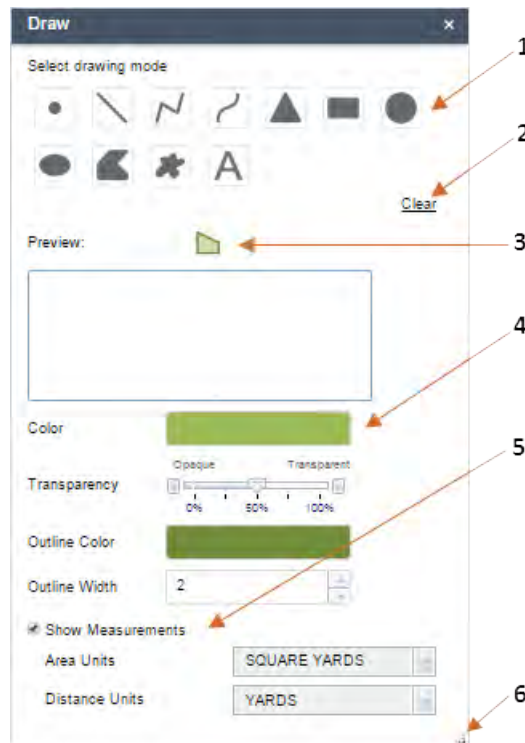
## Editing Tips

- After double-clicking to end a GIS object drawing, you cannot add another point to the drawing. If you mistakenly ended the drawing, click **Cancel** on the **Edit GIS Object** panel, and re-draw the shape. The edit layer session currently does not support un-do nor re-do actions.
- To pan to another area of the map, click-hold-drag the map to another location.
- Zoom the map to a visible scale before starting an edit layer session. Because the edit layer session requires that the map layer is within the visible scale range, the zoom level cannot be changed during the edit layer session.
- You can show or hide other map layers on the **Layers** widget during an edit layer session to view the new or modified GIS object relative to other map layers.

- To edit a different layer, click the **STOP EDITING** button to exit the current edit layer session. On the **Layers** widget, click the layer editing tool next to the other layer.

## Redlining and Annotating a Map


To annotate a map with shapes or text labels, click the Draw icon . The following diagram shows a sample Draw panel:



On the Draw panel, you can:

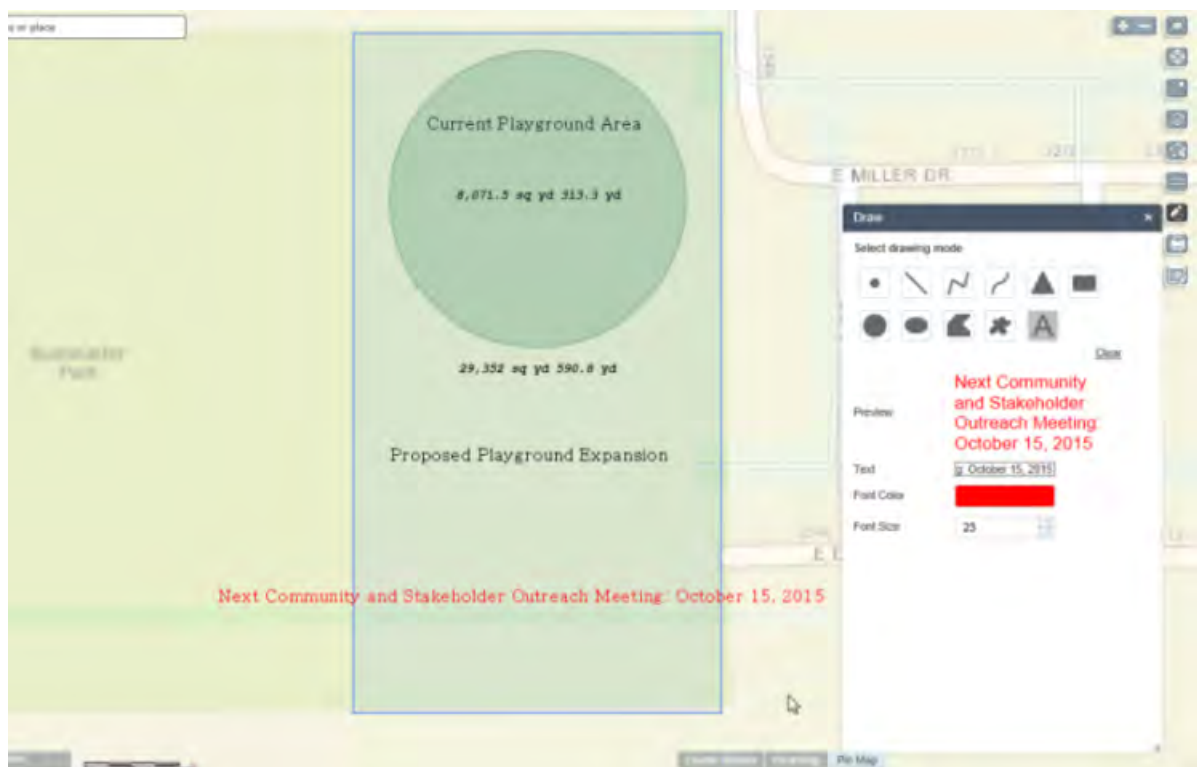
- 1: Select a drawing tool, either a point, line, shape, or text label.
- 2: Clear any drawing or text label on the map.
- 3: See a preview of the shape or text label.
- 4: Choose color, transparency, and outline attributes. For a text label, you can choose the font color and text size.
- 5: For line or shape drawing tools, show measurements and choose the units.
- 6: Expand or adjust the size of the Draw panel.

After you have set the drawing tool attributes, click-and-drag your mouse on the map to draw the shape.

For a text label, select the Text icon , enter the text on the Text field, and point-and-click where you want to place the text label. You can use the Print widget to export your annotated map into a PDF or JPG file, and send it to the printer or attach it to a record or notification letter.

The following diagram shows a sample annotation which helps an agency user to identify proposed work location and add relevant comments.



**Note:**

To draw a combination of annotation shapes and labels, work with one annotation at a time. For example, first select a shape tool, adjust its attributes, then draw the shape on the map. If you need to make a change, click Clear and redo the shape. After you are satisfied with the shape and need a text label, click the text tool. Enter the text on the Text field and adjust the text attributes, then point-and-click on the shape where you want the text label to appear.

**Note:**

To estimate the placement of a text label, the point on which you click is the center of the text label.

**Note:**

Remember to select a drawing tool before drawing on the map. You cannot draw on the map unless you have clicked a drawing tool on the Draw panel.

**Note:**

The drawing tool offers basic, temporary annotation capabilities. It currently does not allow you to undo nor update an existing annotation. If you click Clear, all current annotations will be cleared.

## Printing a Map


To print a map, click the Print icon . Printing a map will export the map to a selected format. To send the map to a printer, send the exported file to the printer. The following table describes the print options:

Table 17: Print options

<b>Map Title</b>	The map title appears at the top of the page. The maximum number of characters is 85.
<b>Layout</b>	The page size and orientation.
<b>Format</b>	The file format to export to: PDF, EPS, JPG, PNG 8-bit, PNG 32-bit, SVG, and SVGZ (compressed).
<b>Advanced &gt; Map scale/ extent</b>	Choose either the current map scale, default map extent, or a forced scale. Click the <code>current scale</code> link to determine the current map scale number and adjust it as needed.
<b>Advanced &gt; Layout metadata</b>	The Author and Copyright information. In addition, select the Include legend checkbox to display the map legend.
<b>Advanced &gt; MAP_ONLY size</b>	The Width and Height (in pixels) dimensions of the map.
<b>Advanced &gt; Print quality</b>	The DPI (dots per inch) number to specify the print resolution.

## Geo-locating Records

Accelea GIS provides geographic visualization of Civic Platform records and the ability to process records directly from a map.

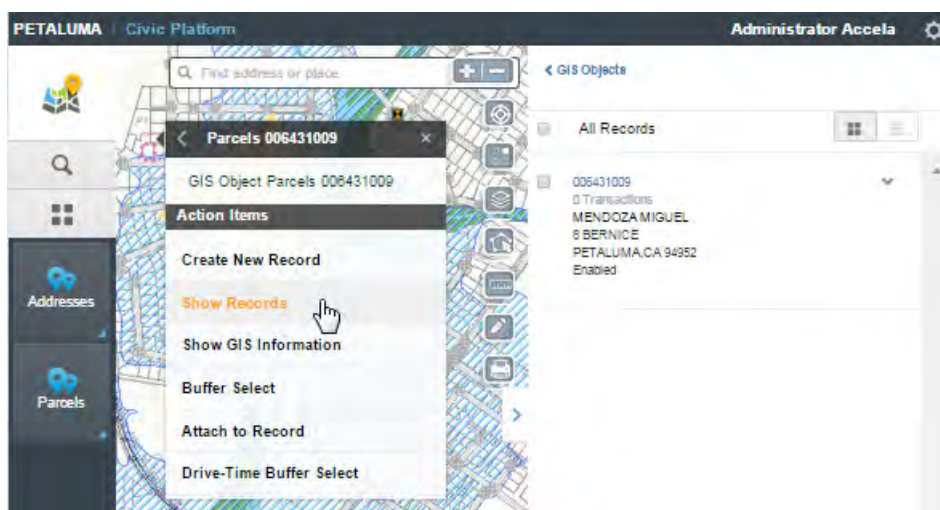
### Topics:


- [Showing records from a map](#)
- [Plotting records on the map](#)
- [Creating a new record from a map](#)
- [Attaching GIS objects to a record](#)

### Showing records from a map

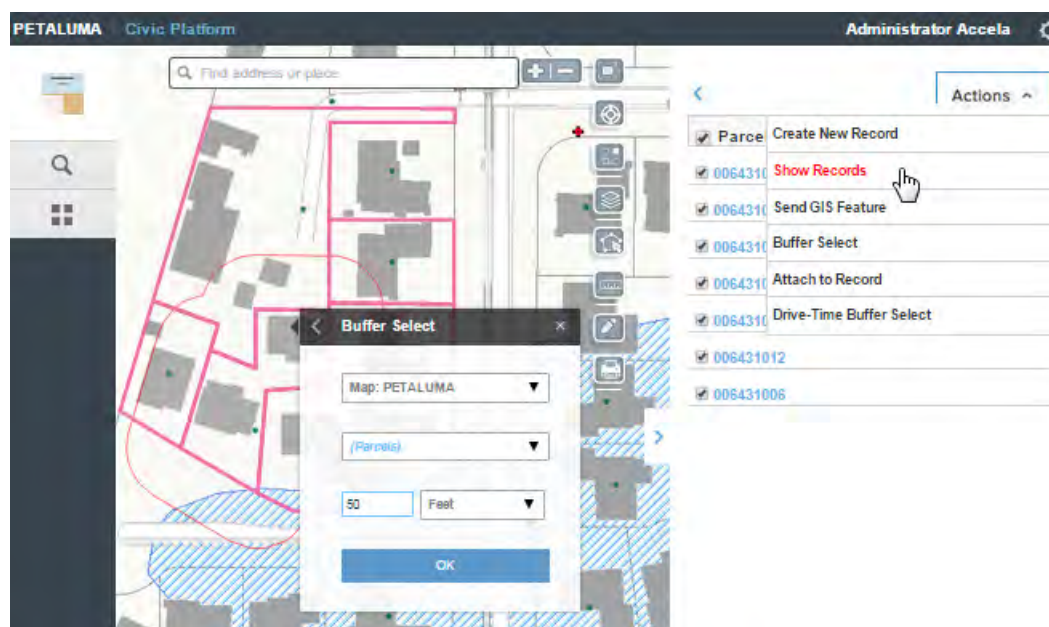
Using the Map dashboard in Civic Platform, you can see and analyze Civic Platform records within the context of their geographic locations. When you select one or more map locations, the **Show Records** option is available either on the context menu or on the **Actions** menu on the slide-out panel. The **Show Records** option displays all records associated with the selected GIS feature, and also provides links to related transaction details.

The following diagram shows a sample record and related transaction detail associated with a selected parcel on the map. You can click a record link to see details on a record intake form.

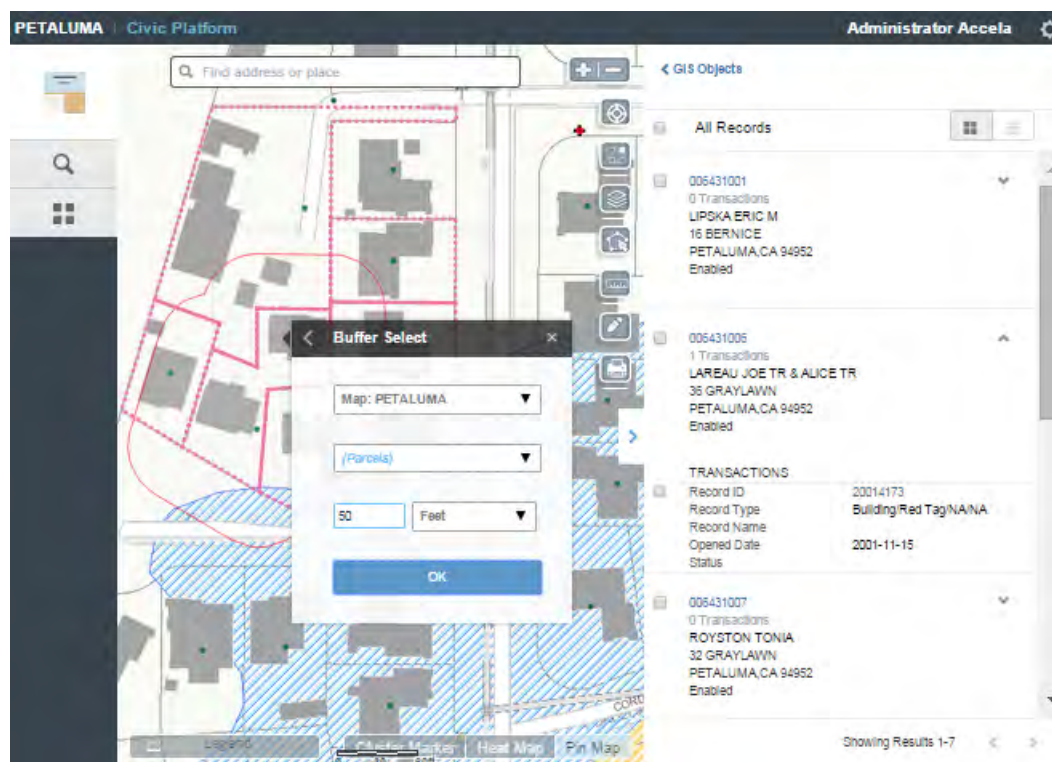


**Note:** When you click on a map location and only see the x and y coordinates instead of the context menu with the action items, make sure you select the appropriate map layer as **Selectable** on the **Layers** widget .

The following diagram shows a map with multiple selected locations (using a distance buffer selection) and the **Actions** menu with the Show Records option:



The following diagram shows the records and transactions associated with the selected GIS objects on the slide-out panel:



## Plotting records on the map

While browsing a record list, you can select records and plot them on the map. To plot records on the map:

1. From the Civic Platform dashboard, open **Records**.
2. Select the records you want to plot, and click **GIS**. The following example shows a list of active records

PETALUMA Civic Platform Administrator Accela

Record

Menu Refine Search New Create By Form Create From Model Delete **Map** Create a Set View L

Showing 1-5 of 5

Record ID	Record Type	Record Type Alias	Status	Opened Date	Priority	Street Name
<input checked="" type="checkbox"/> 17CAP-00000-0006C	AMS/Public Works/Sewer/Main Repair	AMS/Public Works/Sewer/Main Repair		12/08/2017	1	REDWOOD
<input checked="" type="checkbox"/> 17CAP-00000-0006A	AMS/Public Works/Sewer/Main Repair	AMS/Public Works/Sewer/Main Repair		12/08/2017	1	McDowell
<input type="checkbox"/> 17SLO-00000-00032	AMS/Parks/Maintenance/NA	AMS/Parks/Maintenance/NA		12/08/2017		
<input checked="" type="checkbox"/> 17CAP-00000-00069	AMS/Public Works/Sewer/Main Repair	AMS/Public Works/Sewer/Main Repair		12/07/2017	1	McDowell
<input type="checkbox"/> 17CAP-00000-00068	Building/Building/Building/TestSecurity	Building/Building/Building/TestSecurity		12/07/2017		12 10th

Page 1 of 1

The selected records display on the **Records** panel on the right, and the map plots parcels, assets, and addresses attached to the selected records. The **Records** panel lists the plotted records and summary information about each record:

PETALUMA Civic Platform Administrator Accela

Find address or parcel

RECORDS

3 RECORDS

Select All ACTIONS

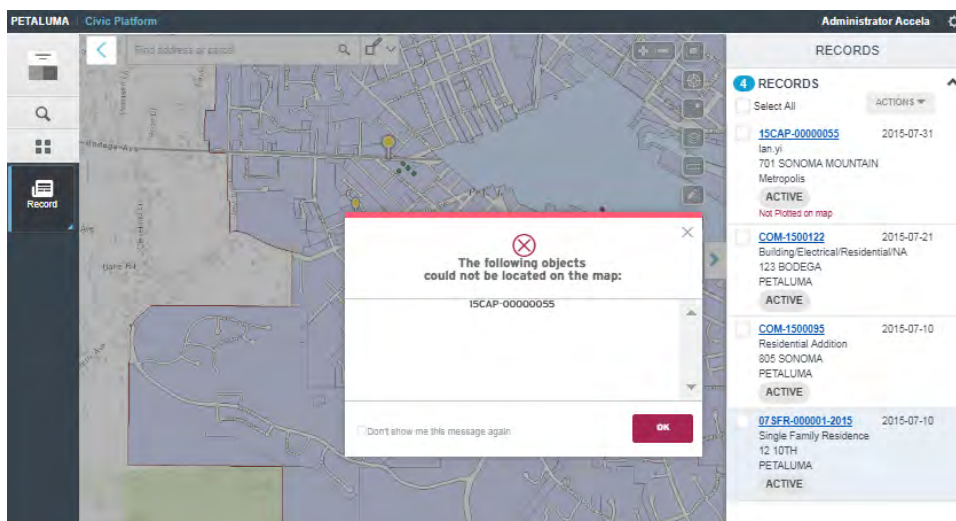
<input type="checkbox"/> 17CAP-00000477	2017-12-08	AMS/Public Works/Sewer/Main Repair	1301 REDWOOD	PETALUMA
<input type="checkbox"/> 17CAP-00000473	2017-12-08	AMS/Public Works/Sewer/Main Repair	1388 McDowell	PETALUMA
<input type="checkbox"/> 17CAP-00000471	2017-12-07	AMS/Public Works/Sewer/Main Repair	1395 McDowell	PETALUMA

The **Records** panel displays the following record information, if available:

- Record custom ID
- Record opened date
- Record type
- Record address line 1
- Record address line 2
- Record status

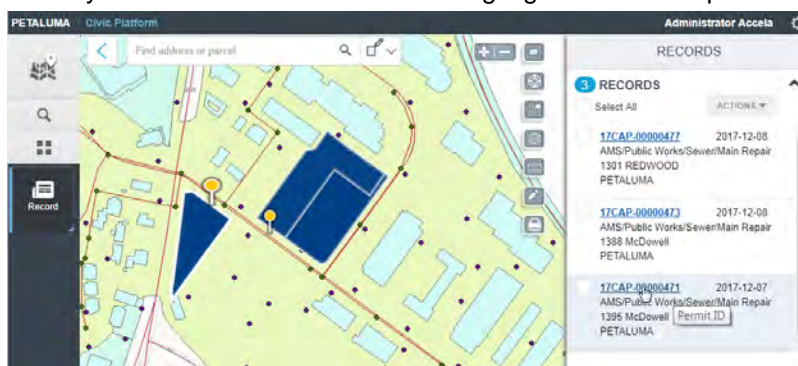
Note the following:

- For each selected record, the map plots any associated parcels, assets, and GIS objects. If a record has multiple addresses, the primary address is plotted.
- The GIS feature highlighted for each record is based on the link ID field stored in the AGIS\_Object table.
- If any of the selected records from the list could not be plotted on the map because they do not have associated GIS objects, a message window appears with the list of unplotted record. For example:

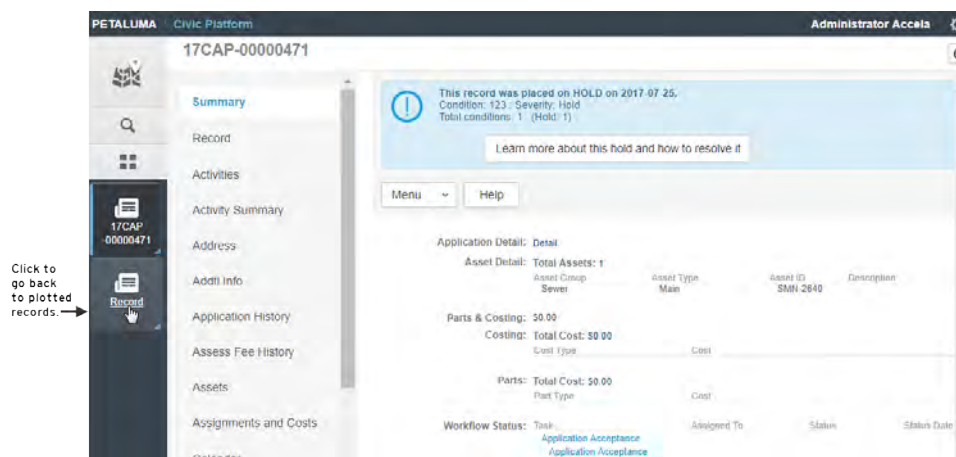


3. On the **Records** panel, you can:

- Hover your mouse over an address to highlight it on the map:



- Click a record link to see its details:



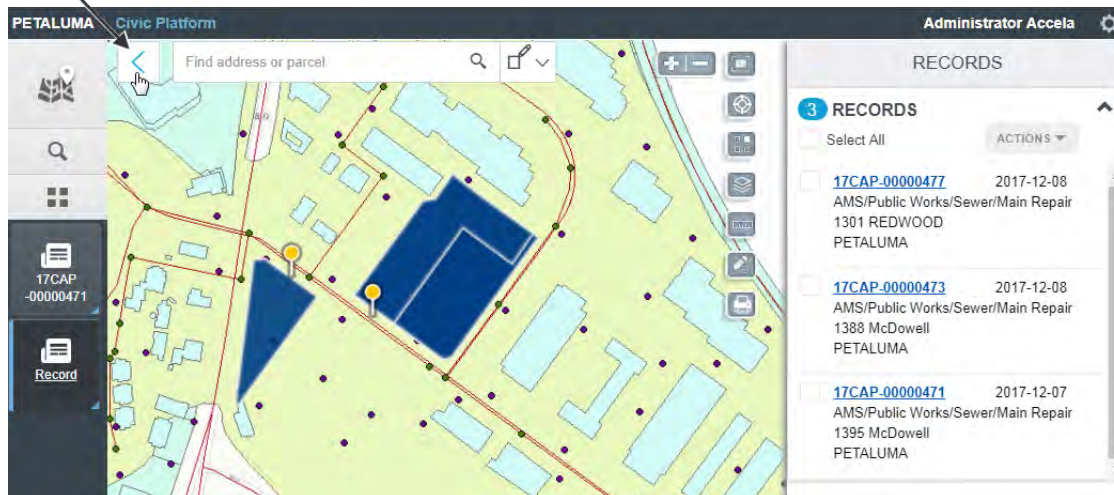
To go back to the plotted map, click the current **Record** workspace.

- Select records and click **Actions** to perform one of the following actions:
  - **Create Inspections** - Opens the inspection intake form to allow you to schedule inspections using the selected records.

- **Show Documents** - Opens the document list for the selected records.

4. To go back from the map to the **Record** list, click the back arrow:

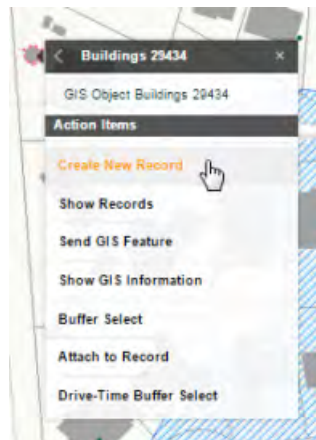
Click to go back to Records list.



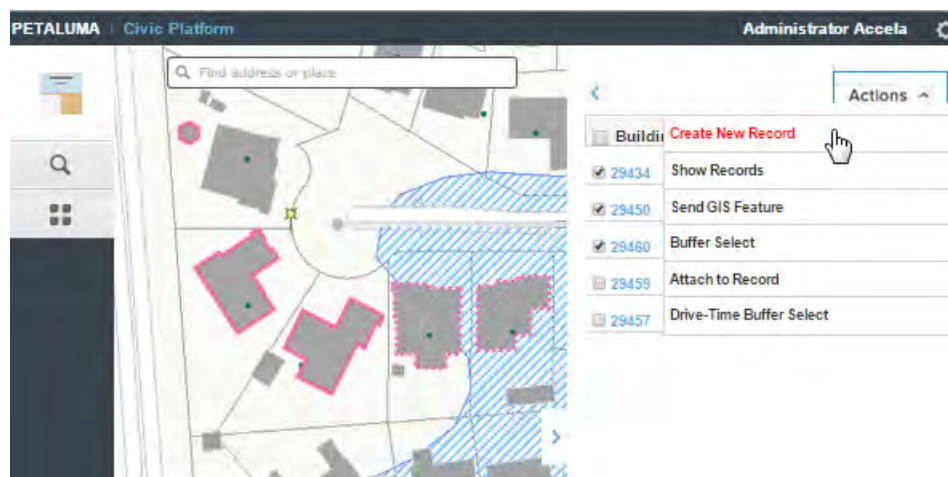
## Creating a new record from a map

While working with map features, you can create records to be associated with your selected GIS objects. This allows you to visually confirm the geographic objects within your agency's jurisdiction that requires additional action, and also allows you to bind GIS information with transactional records in Civic Platform. These records can be a permit application, work order, service request, asset condition assessment, and other record types supported in Civic Platform.


You can create a record for a single GIS feature, or create records for multiple selections. If you selected a single map feature, create a new record by choosing Create New Record from the context menu. For example:



If you selected multiple map features, select the GIS objects displayed on the slide-out panel, and choose Create New Record from the Actions menu. For example:



Create New Record prompts you for a record type, and opens a Civic Platform intake form. It automatically displays GIS information from the selected GIS objects so that you do not need to enter the GIS information. If you selected multiple GIS objects, you will be prompted to choose the primary GIS object to attach to the new record. Any reference information that already exists in Civic Platform such as the parcel information also automatically displays on the intake form.

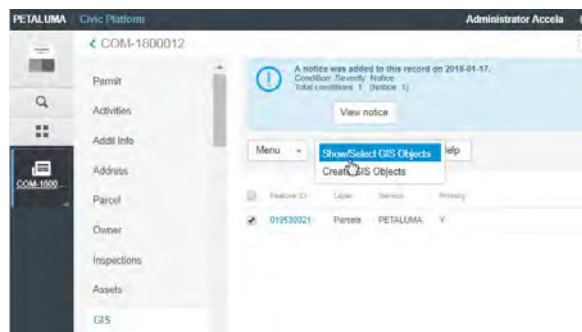
 **Note:** The same Civic Platform user group permissions apply when creating a record from a map. For example, if you can create work orders and service requests in Civic Platform, you can also create them from a map.

## Attaching GIS objects to a record

While working with records in Civic Platform, you can create and attach GIS objects to the current record. This allows anyone working with the record to geographically visualize the impact or extent of the transaction record within the agency's jurisdiction. For example, a permit clerk can draw the exact location of a new property including the extent of its environmental impact. The geographic data enhances the transaction record and can help with facilitating efficient and effective transaction workflows.

From the GIS section of a record detail, you can:

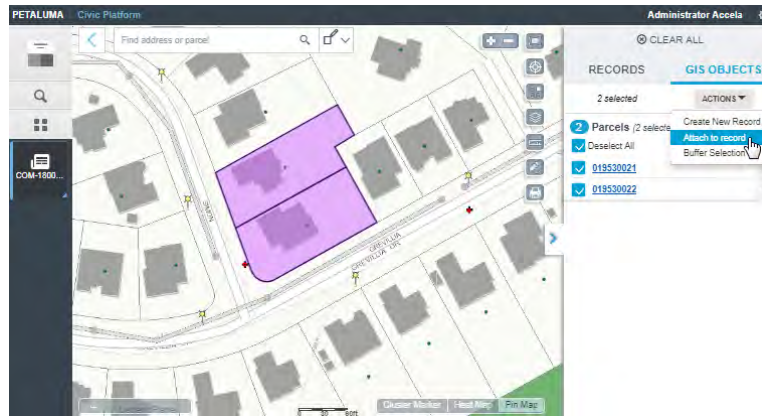
- Attach one or more existing GIS objects to the record:
  1. From the GIS menu, select **Show/Select GIS Objects**.



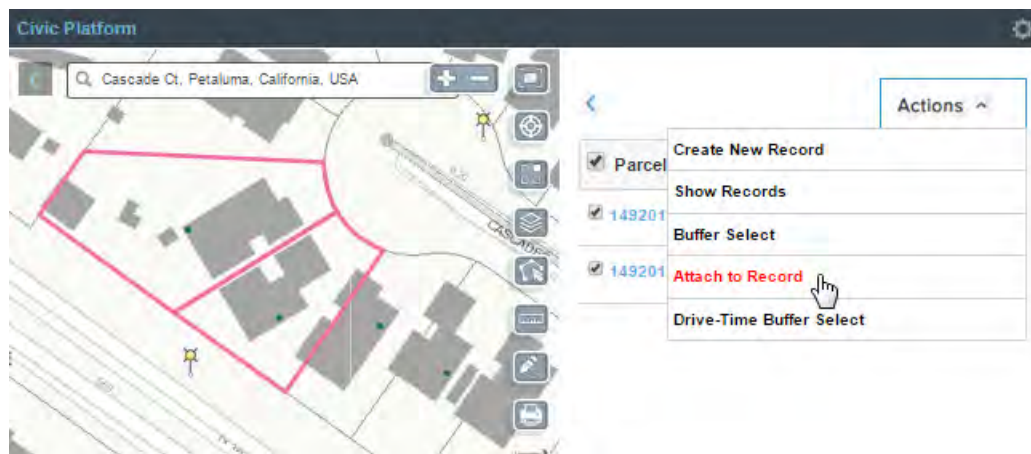
Civic Platform opens the map.

2. Navigate the map to find and select the map features you want to attach to the record. The following sample diagram shows two selected parcels to be attached to the current record:

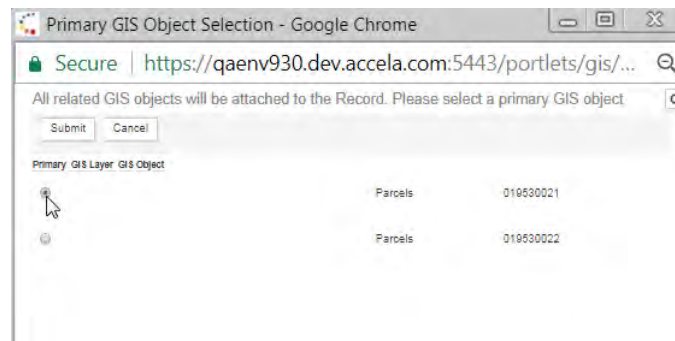




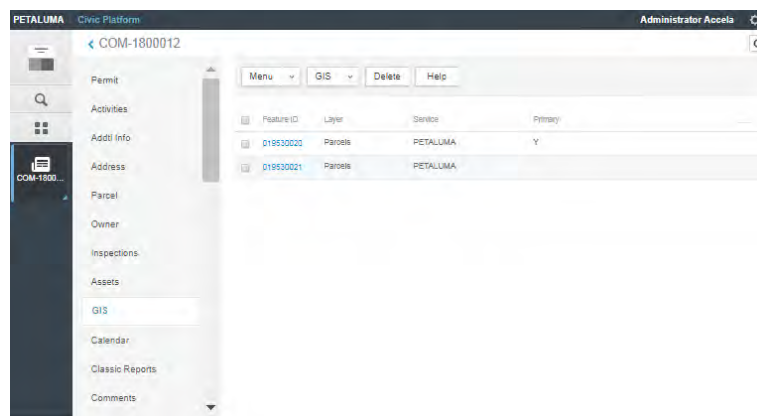
3. On the slide-out panel, select the GIS object layer (for example, parcels), select the GIS objects (for example, the parcel IDs), and choose **Actions > Attach to Record**:



4. If you selected multiple GIS objects, Civic Platform prompts you to choose the primary GIS object. For example:

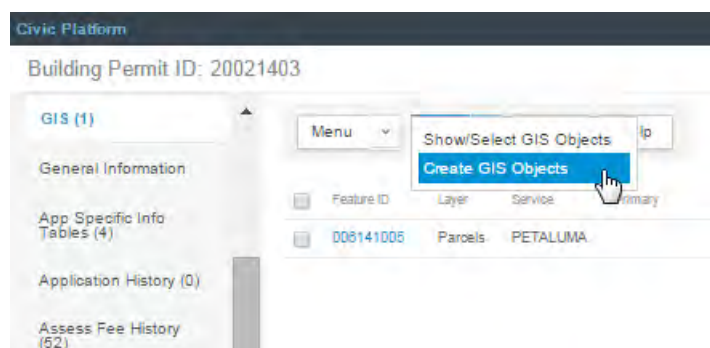


5. Click the < navigation link at the top left corner of the map to go back to the record detail. The GIS section shows the selected GIS objects that have been attached to the record. The following sample diagram shows the two selected parcels that are now attached to a record:



- Create a new GIS object before attaching it to the record:

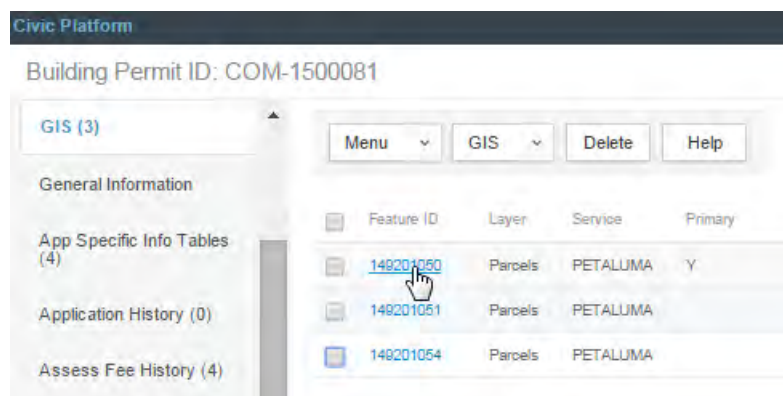
1. From the GIS menu, select **Create GIS Objects** to open the map.



2. Navigate the map to the location where you want to create a map feature. See [Creating and Editing Map Features](#).

- View a GIS object on the map:

From the list of map features on the GIS section, click the Feature ID of the GIS object you want to view. The map dashboard highlights the selected GIS object. For example:



- Detach a GIS object from the record:

From the list of map features on the GIS section, select the Feature ID you want to delete, and click **Delete**:

Civic Platform

Building Permit ID: COM-1500081

GIS (3)

General Information

App Specific Info Tables (4)

Application History (0)

Assess Fee History (4)

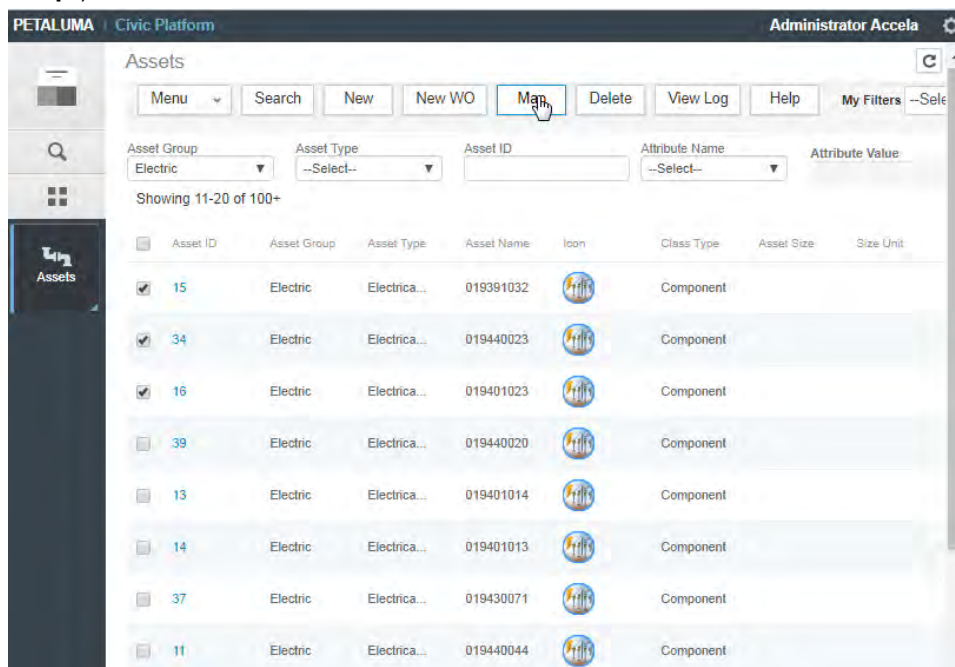
Menu GIS Delete Help

<input type="checkbox"/>	Feature ID	Layer	Service	Primary
<input type="checkbox"/>	149201050	Parcels	PETALUMA	Y
<input type="checkbox"/>	149201051	Parcels	PETALUMA	
<input checked="" type="checkbox"/>	149201054	Parcels	PETALUMA	

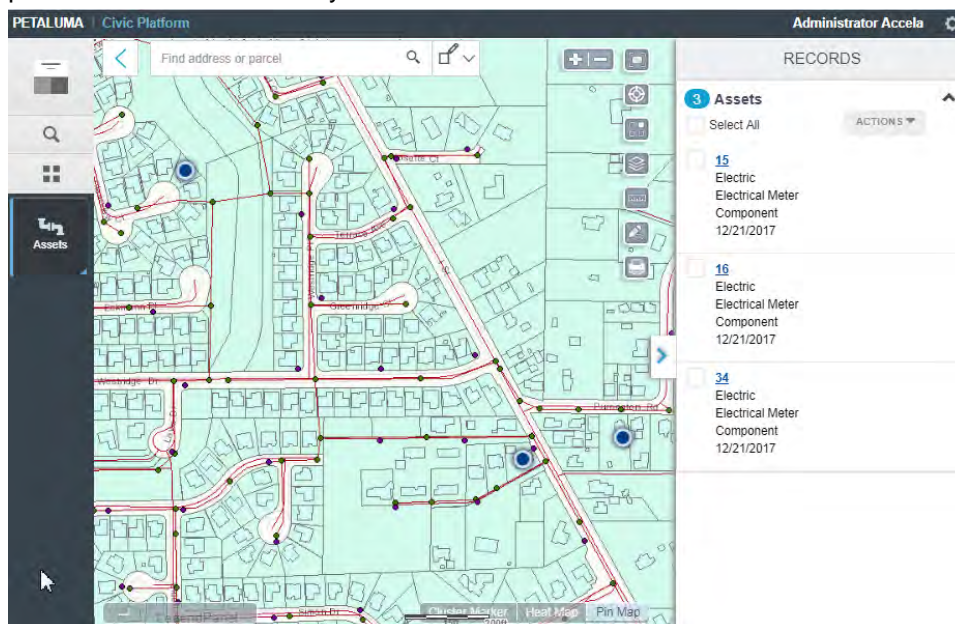
## Plotting Assets on the Map

Back-office users can plot selected assets on the map and see the asset records while viewing the map. To plot assets on the map:

1. From the Civic Platform dashboard, open **Assets**.
2. Select the assets you want to plot, and click **GIS** (Note: Your agency may configure this button label as "Map"):



The map displays the plotted assets and a **Records** panel on the right. The **Records** panel lists the plotted assets and summary information about each asset:

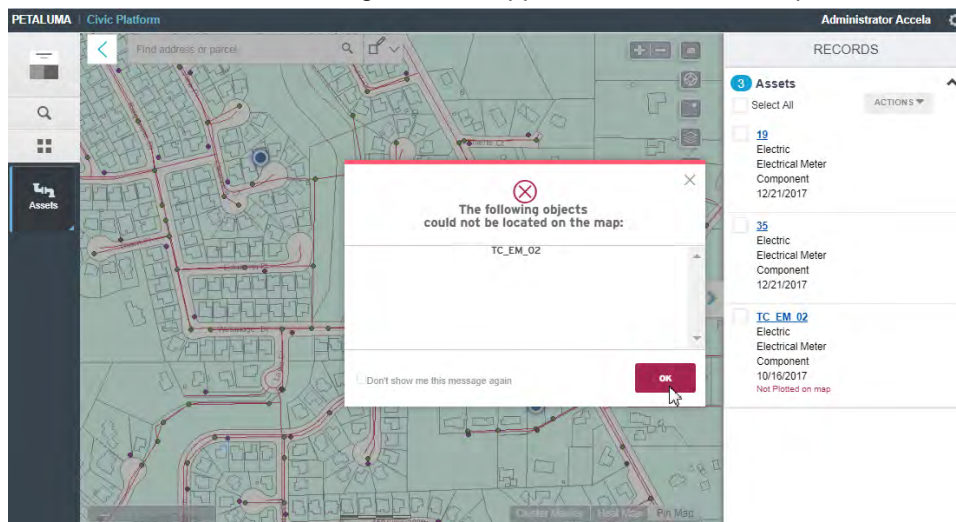


The **Records** panel displays the following asset information, if available:

- Asset ID
- Asset group
- Asset type
- Asset class type
- Asset install date
- Asset status
- Related transactions, if any

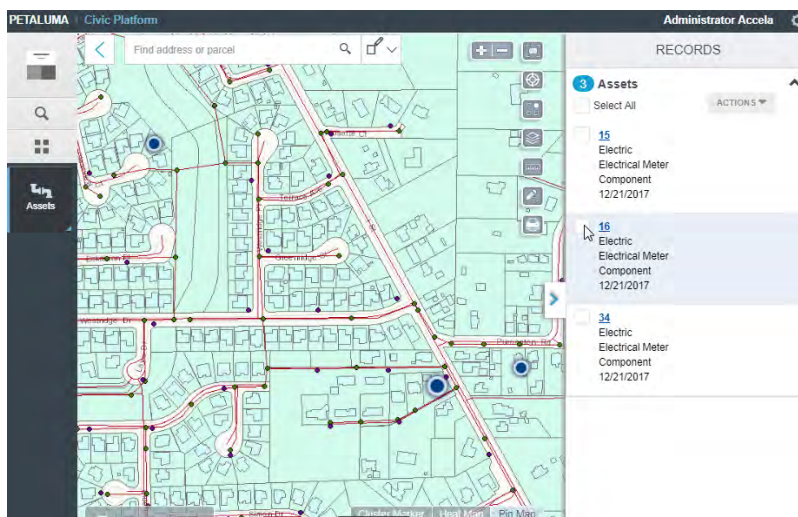
Note the following:

- The asset feature highlighted for each asset reference record is based on the link ID field stored in the AGIS\_Object table.
- If there is no asset found for the item, and the asset has an address on the asset reference record, the address is geo-coded based on the geocoding settings in Accela GIS administration.
- For assets with GIS objects and multiple addresses, the GIS object will be plotted instead of the addresses. If there are no GIS objects, the addresses will be plotted.
- If any of the selected assets from the list could not be plotted on the map because they do not exist in the GIS database, a message window appears with the list of unplotsed assets. For example:

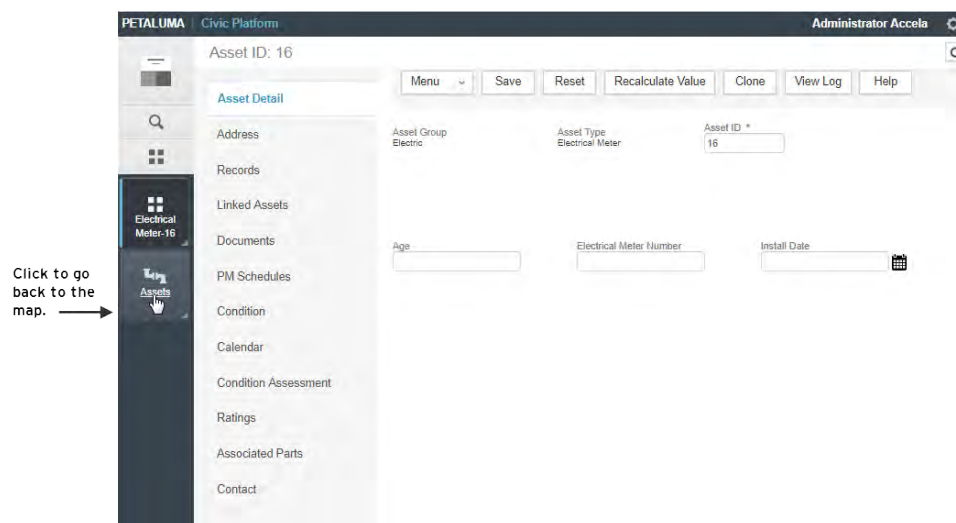


3. On the **Records** panel, you can:

- Hover your mouse over an asset to highlight it on the map:

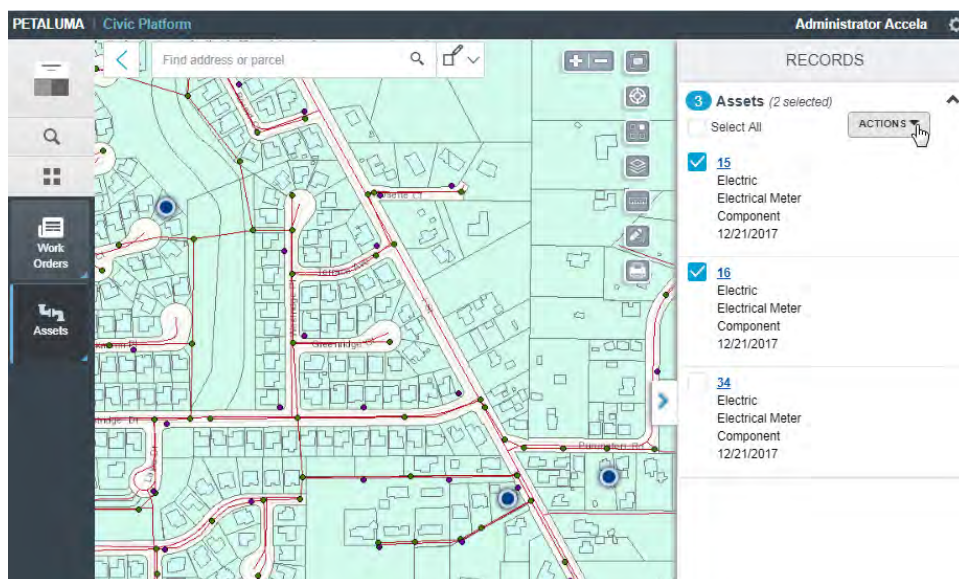


- Click an asset link to see its details:



To go back to the plotted map, click the current **Assets** workspace.

- Select one or more assets, and choose an action from the **Actions** menu:



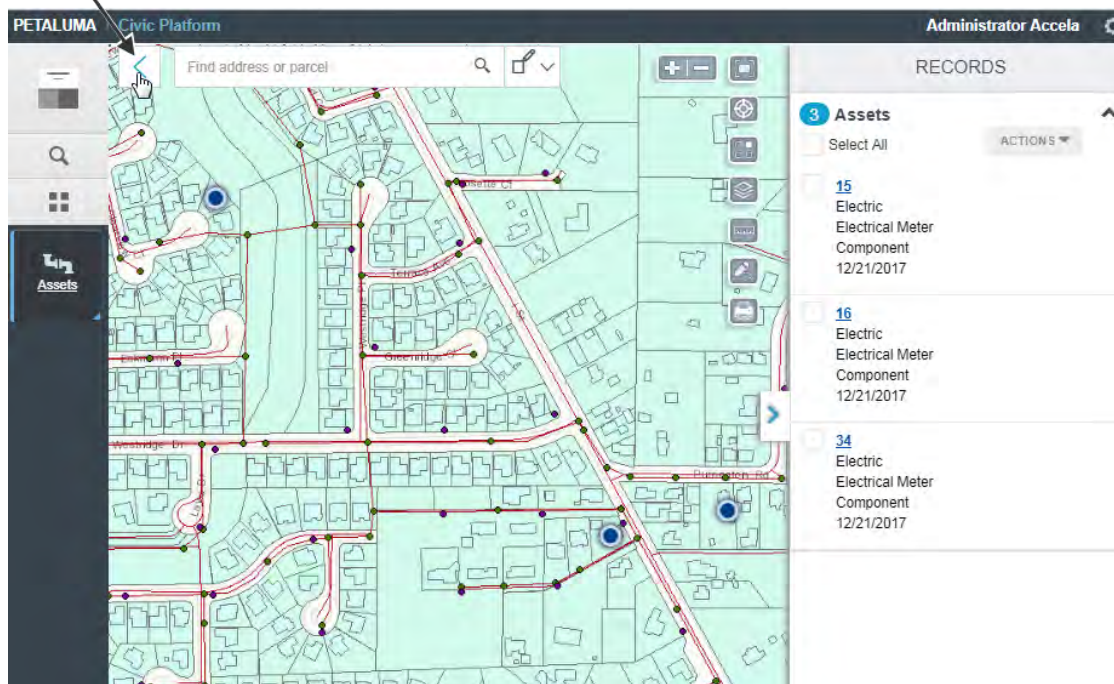
The following actions are available:

- **Create a Work Order** - Creates a single work order for all of the selected assets.
- **Create Multiple Work Orders** - Creates separate work orders for each of the selected assets.

For details about creating a work order, see [Creating a Work Order from an Asset List](#).

4. To go back from the map to the Assets list, click the back arrow:

Click to go back to the Assets list.

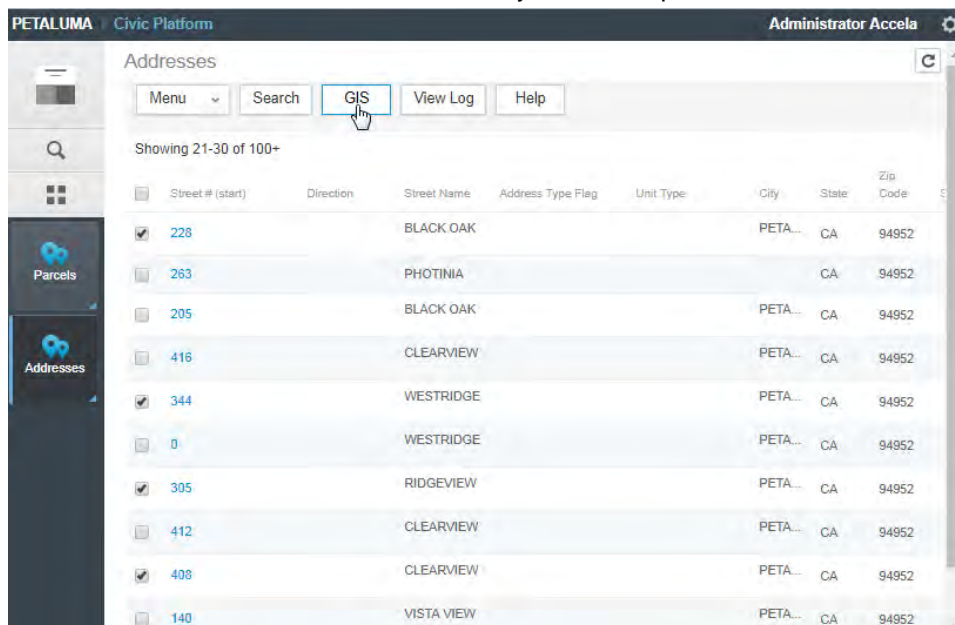


## Plotting Addresses on the Map

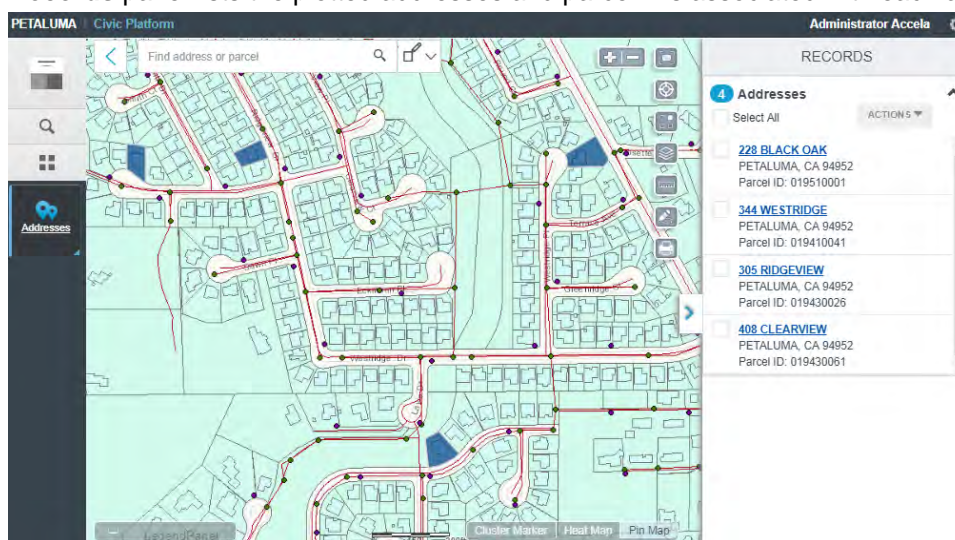
Back-office users can plot selected addresses on the map and see the address records while viewing the map.

To plot addresses on the map:

1. From the Civic Platform dashboard, open **Addresses**.
2. From an address list, select the addresses you want to plot, and click **GIS**:



The map displays the plotted addresses or associated parcels and a **Records** panel on the right. The **Records** panel lists the plotted addresses and parcel IDs associated with each address:



The **Records** panel displays the following address information, if available:

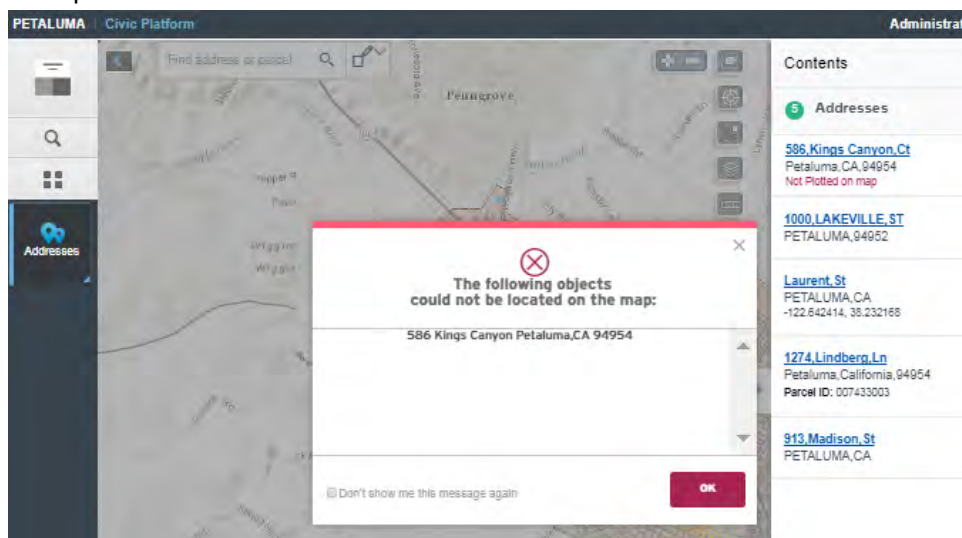
- Address line 1
- Address line 2



- Address line 3
- Address line 4

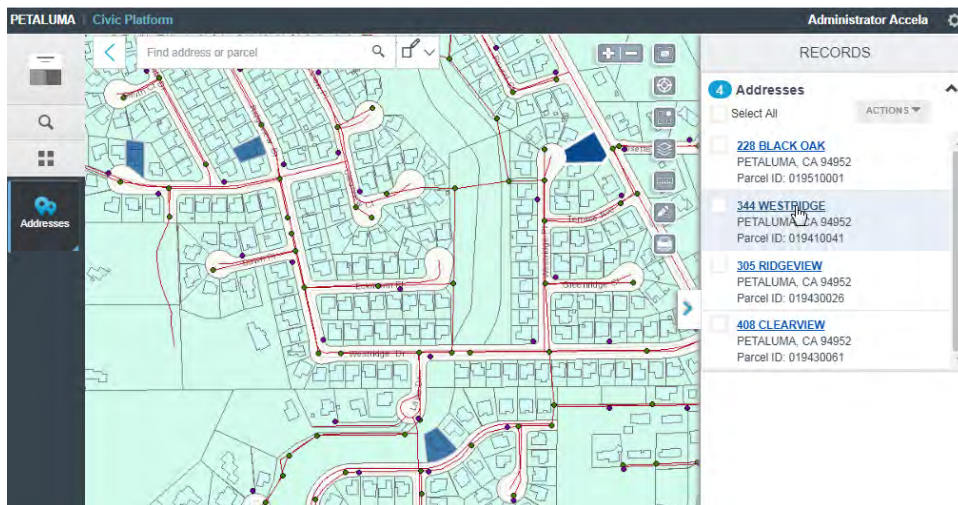
Note the following:

- Parcels associated to the address are highlighted based on the address-parcel relationship.
- If there is no address-parcel relationship, the address is plotted based on the X-Y coordinate.
- If there is no address-parcel relationship, and the X-Y coordinates are non-existent or invalid, the address is geocoded based on the geocoding configuration in the Accela GIS Administration site.
- Address intersections are not yet supported. Address geocoding is currently used to plot the geographic coordinates of address intersections on the map.
- If any of the selected addresses from the list could not be plotted on the map because they do not exist in the GIS database, a message window appears with the list of unplotted addresses. For example:

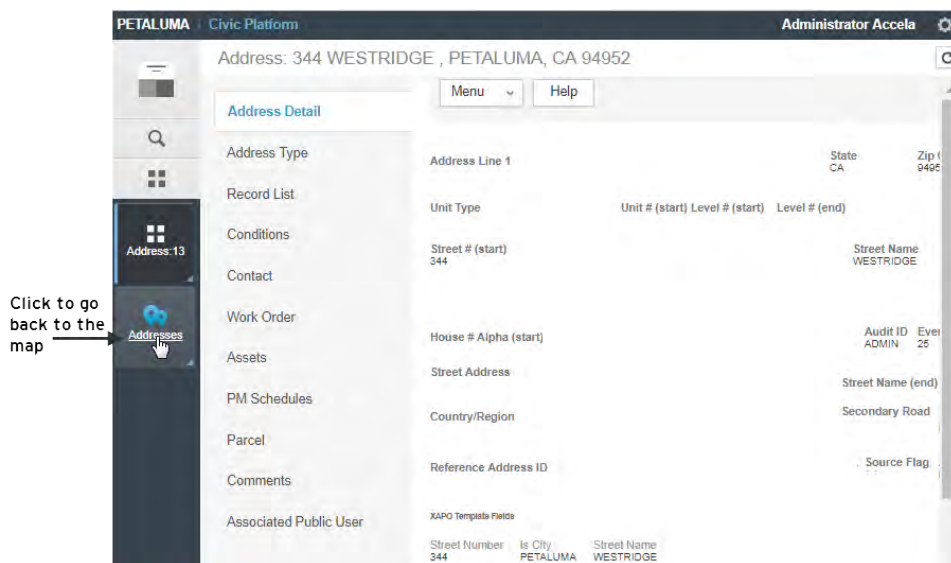


3. On the **Contents** panel, you can:

- Hover your mouse over an address to highlight it on the map. If there is a parcel associated with the address, the parcel is highlighted.



- Select addresses and click **Actions** to perform one of the following actions:
  - **Create New Record** - Opens the application intake form to allow you to submit a new record using the selected addresses.
  - **Show Documents** - Opens the document list for the selected addresses.
- Click an address link to see the address details:



To go back to the plotted map, click the current **Addresses** workspace icon.

4. To go back from the map to the **Addresses** list, click the back arrow:

Click to go back to the Addresses list.

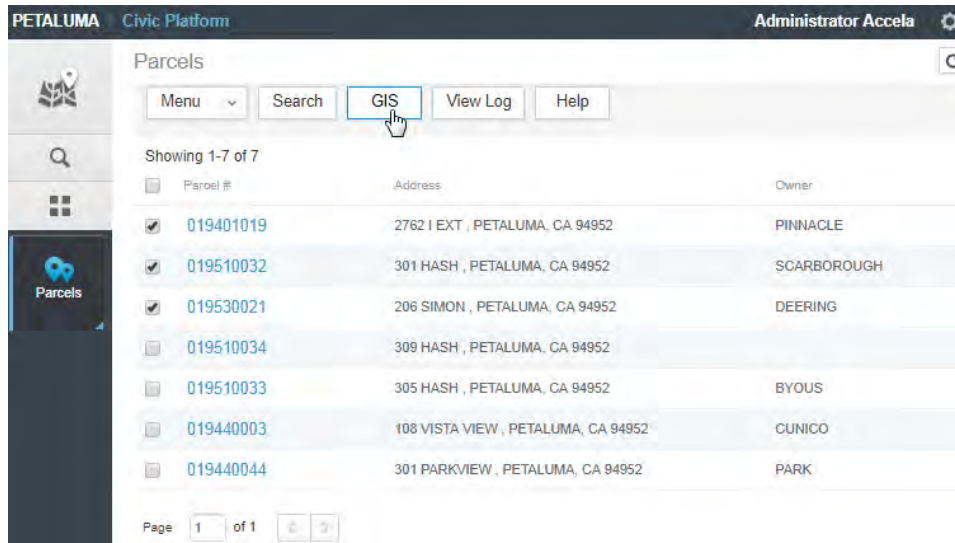
The screenshot displays the Civic Platform interface for Petaluma, CA. The top header shows 'PETALUMA Civic Platform' on the left and 'Administrator Accela' on the right. A search bar at the top center contains the text 'Find address or parcel'. The main area is a map showing a residential street grid with several addresses highlighted in blue. On the left side, there is a vertical sidebar with three menu items, each with a grid icon and the text 'Address:13', and a bottom item with a blue location pin icon and the text 'Addresses'. On the right side, there is a 'RECORDS' panel titled '4 Addresses (2 selected)'. This panel includes a 'Select All' button and an 'ACTIONS' dropdown menu. Below these are four address entries, each with a blue link, the address name, the city and state, and the parcel ID:

- [228 BLACK OAK](#)  
PETALUMA, CA 94952  
Parcel ID: 019510001
- [344 WESTRIDGE](#)  
PETALUMA, CA 94952  
Parcel ID: 019410041
- [305 RIDGEVIEW](#)  
PETALUMA, CA 94952  
Parcel ID: 019430026
- [408 CLEARVIEW](#)  
PETALUMA, CA 94952  
Parcel ID: 019430061

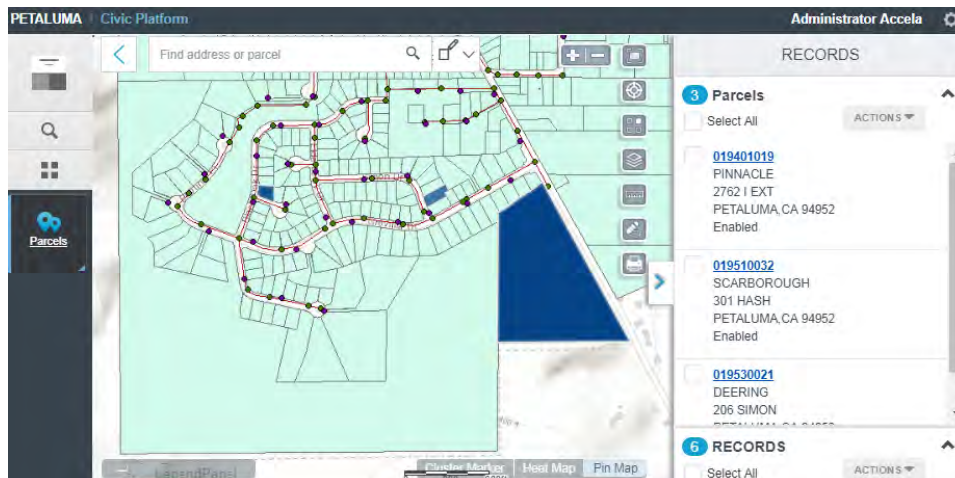
## Plotting Parcels on the Map

Back-office users can plot selected parcels on the map and see the parcel records while viewing the map. To plot parcels on the map:

1. From the Civic Platform dashboard, open **Parcels**.
2. Select the parcels you want to plot, and click **GIS**:



The map displays the plotted parcels and a **Records** panel on the right. The **Records** panel lists the plotted parcels and summary information about each parcel:

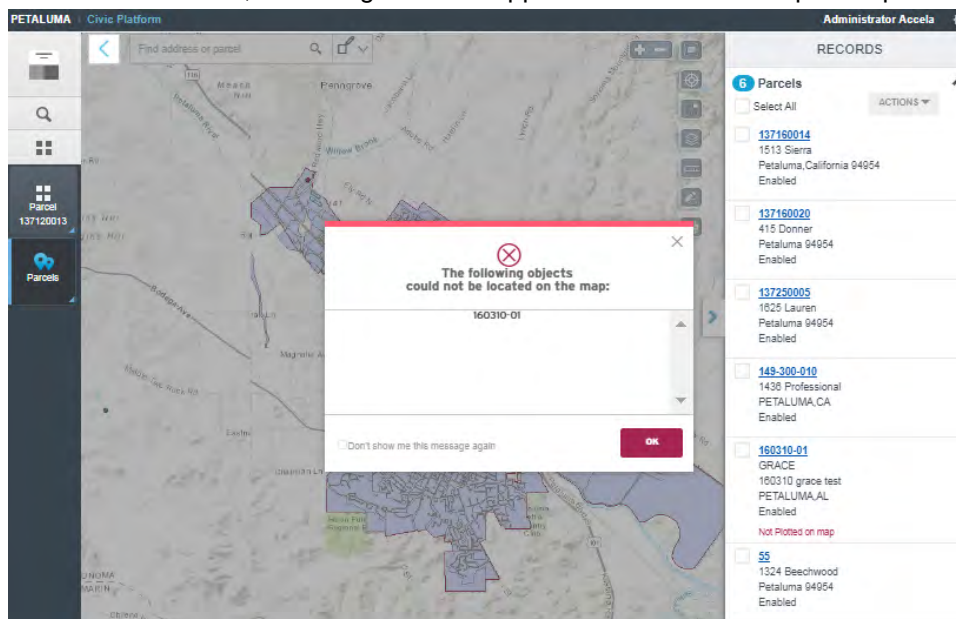


The **Records** panel displays the following parcel information, if available:

- Parcel ID
- Parcel owner
- Parcel address line 1
- Parcel address line 2
- Parcel status
- Related transactions, if any

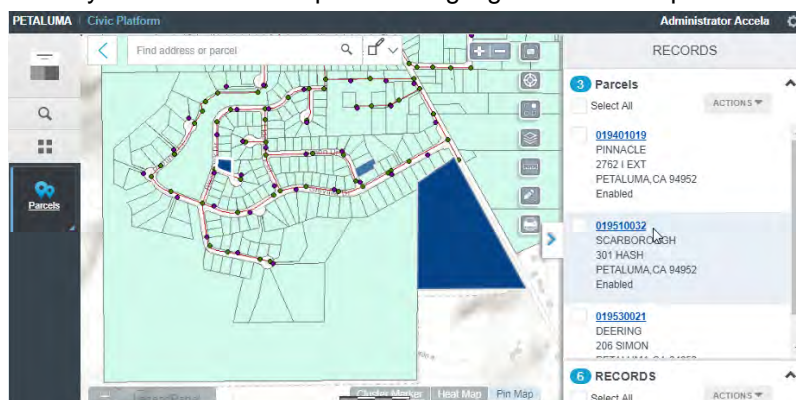
Note the following:

- The parcel feature highlighted for each parcel reference record is based on the link ID field stored in the AGIS\_Object table.
- If there is no parcel found for the item, and the parcel has an address on the parcel reference record, the address is geo-coded based on the geocoding settings in Accela GIS administration.
- For parcels with GIS objects and multiple addresses, the GIS object will be plotted instead of the addresses. If there are no GIS objects, the addresses will be plotted.
- If any of the selected parcel from the list could not be plotted on the map because they do not exist in the GIS database, a message window appears with the list of unlocated parcels. For example:



3. On the **Records** panel, you can:

- Hover your mouse over a parcel to highlight it on the map:

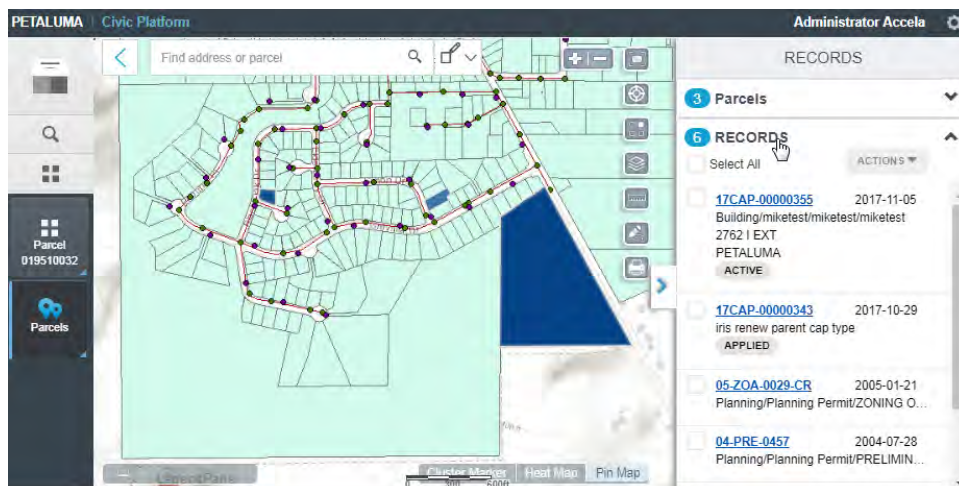


- Click a parcel link to see its details:



To go back to the plotted map, click the current **Parcels** workspace.

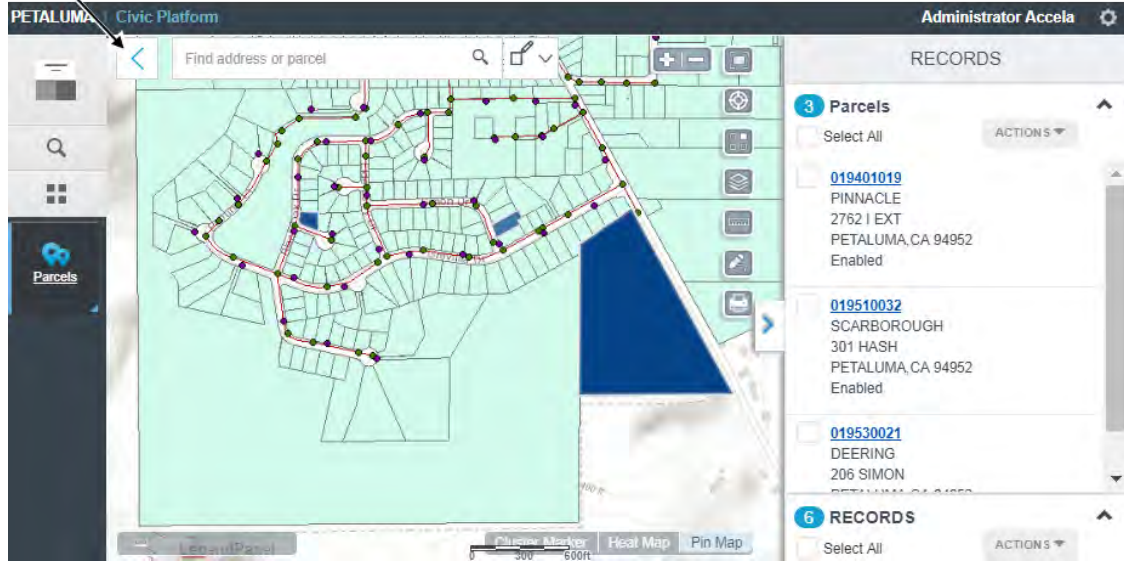
- Select parcels and click **Actions** to perform one of the following actions:
  - **Create New Record** - Opens the application intake form to allow you to submit a new record using the selected parcels.
  - **Show Documents** - Opens the document list for the selected parcels.
  - **Buffer Selection** - Selects GIS objects within a specified radius distance from the selected parcels.
- Expand the **Records** list to see related transactional records:



- Select records and click **Actions** to perform one of the following actions:
  - **Create Inspections** - Opens the inspection intake form to allow you to schedule inspections using the selected records.
  - **Show Documents** - Opens the document list for the selected records.

4. To go back from the map to the Parcels list, click the back arrow:

Click to go back to Parcels list.



## Plotting Inspections on the Map

Back-office users can plot selected inspections on the map and see the inspection records while viewing the map.

To plot inspections on the map:

1. From the Civic Platform dashboard, open **Inspections**.
2. Select the inspections you want to plot, and click **Show Locations on Map**:

The screenshot shows the 'Inspections' dashboard for Administrator Accela. The 'Show Locations on Map' button is highlighted with a red box and a mouse cursor. Below the button is a table of inspection records.

	Scheduled Date	Scheduled Start Time	AM/PM	Request Date	Inspector	Inspection Type	Record ID	Record Type
<input type="checkbox"/>	01/14/2018			01/11/2018		Water - Services ...	09MEC-00000-00002	Building/Mec
<input type="checkbox"/>	01/13/2018			01/11/2018		Water - Services ...	04PLN-00000-00362	Planning/Pla
<input checked="" type="checkbox"/>	01/12/2018		AM	01/11/2018		Final - Plumbing	18CAP-00000-0000L	Building/Bi
<input type="checkbox"/>	01/11/2018	8:00	AM	01/11/2018	JANICE ZH	Final - Mechanical	18CAP-00000-0000J	AMS/Water/
<input checked="" type="checkbox"/>	01/11/2018	12:00	AM	01/11/2018	JANICE ZH	Final - Building	18CAP-00000-0000G	AMS/Water/
<input checked="" type="checkbox"/>	01/11/2018		AM	01/11/2018	Bob Jones	Other Encroachments	04PLN-00000-00362	Planning/Pla
<input type="checkbox"/>	01/11/2018			01/11/2018	Administrator Accela	AGISTEST	18BLD-00000-00001	Building/AGI





The map displays the plotted inspections using inspection map symbols and a **Records** panel on the right. The **Records** panel lists the plotted inspections and summary information about each inspection:


The screenshot shows the map view of the Civic Platform. The map displays plotted inspections using blue and red symbols. A 'RECORDS' panel is visible on the right, listing the plotted inspections and summary information about each inspection.

Inspection Type	Record ID	Inspector	Date	Time
Final - Building - 7595817	AMS/Water/JESSIE/ASSET	JANICE ZH	01/11/2018	08:00 AM
Final - Plumbing - 7595833	Building/Building Permit/Civic/NA	JANICE ZH	01/12/2018	10:30 AM
Other Encroachments - 7595813	Planning/Planning Permit/ENCROA...	Bob Jones	01/11/2018	01:30 PM

The inspections are plotted using the following map symbols:



Map symbol	Description
	The default status when an inspection has just been created and scheduled. The <b>Records</b> panel shows the inspection status as " <b>Scheduled</b> ".
	The assigned inspection status whose inspection result type is <b>Approved</b> . The <b>Records</b> panel shows the inspection result status that is mapped to the <b>Approved</b> inspection result type.
	The assigned inspection status whose inspection result type is <b>Denied</b> . The <b>Records</b> panel shows the inspection result status that is mapped to the <b>Denied</b> inspection result type.
	The assigned inspection status whose inspection result type is <b>Pending</b> . The <b>Records</b> panel shows the inspection result status that is mapped to the <b>Pending</b> inspection result type.

 **Note:** Your agency can configure multiple inspection result statuses in the inspection result group assigned to an inspection type. The inspection result statuses are mapped to one of the following inspection result types:

- Approved
- Denied
- Pending

When you plot resulted inspections, the **Records** panel shows the inspection result status that is mapped to the inspection result type. In the sample diagram above, the sample inspection `Other Encroachment - 7595813` shows an `Accepted` status. This sample inspection belongs to an inspection type whose inspection result group has been configured with the following sample list of inspection result statuses:

**Inspection Results Group - Edit**

Use this form to set up an Inspection Results Group

Results Group Name: `DEFAULT`

Result	Display Order	Result Type	Minimum Score	Maximum Score	Minimum Major Violations	Maximum Major Violations	
Approved	1	APPROVED ▼					Delete
Denied	2	APPROVED ▼					Delete
Pending	3	PENDING ▼					Delete
Cancelled	4	DENIED ▼					Delete
Wrong Inspe	5	DENIED ▼					Delete
Accepted	6	APPROVED ▼					Delete

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

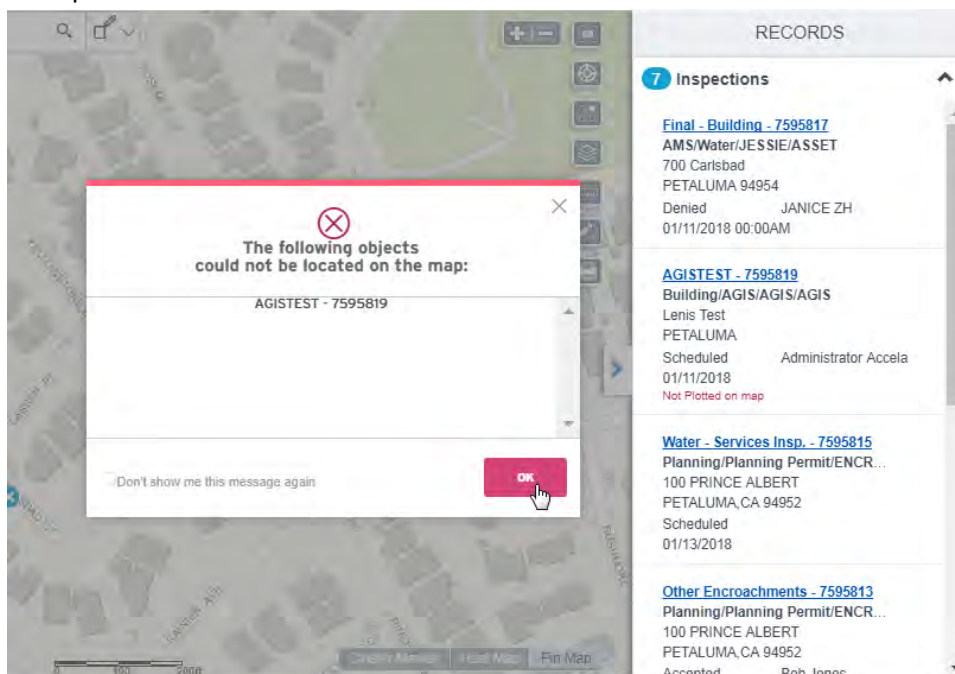
The **Records** panel displays the following inspection information:

- Inspection type and inspection ID
- Record type
- Record type alias
- Inspection address line 1
- Inspection address line 2
- Inspection x-coordinate and y-coordinate

- Inspection status
- Inspector
- Scheduled date and time

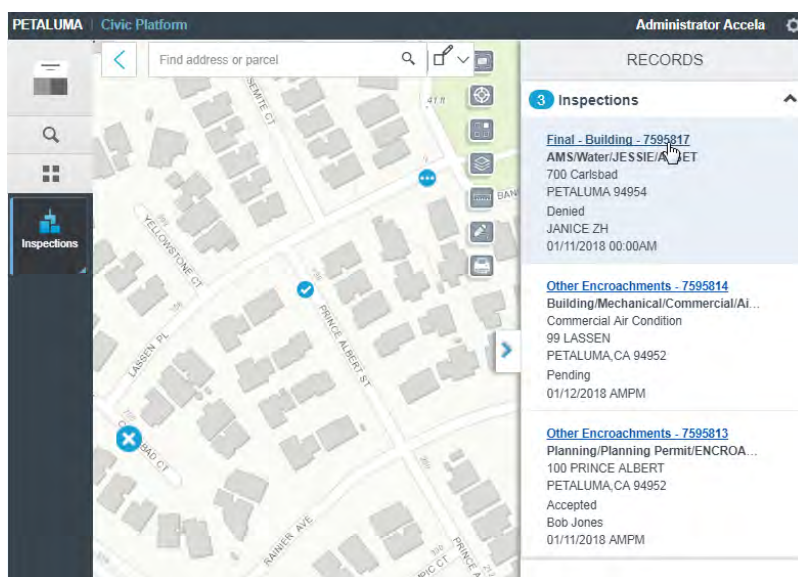
Note the following:

- If the inspection has an x-coordinate and y-coordinate value, these values are displayed. If the inspection does not have an x-coordinate and y-coordinate value, the inspection address is plotted on the map (using the inspection map symbols).
- If the inspection does not have x-coordinate and y-coordinate nor address at the inspection level, the record x-coordinate and y-coordinate values are displayed on the map. If the inspection does not have x-coordinate and y-coordinate nor address at the inspection level nor the record x-coordinate and y-coordinate, the record address is plotted on the map.
- If the inspection has associated GIS objects (such as parcels via the record), the GIS objects are also plotted on the map, in addition to the inspection marker.
- If any of the selected inspection from the list could not be plotted on the map because they do not exist in the GIS database, a message window appears with the list of unlocated inspections. For example:

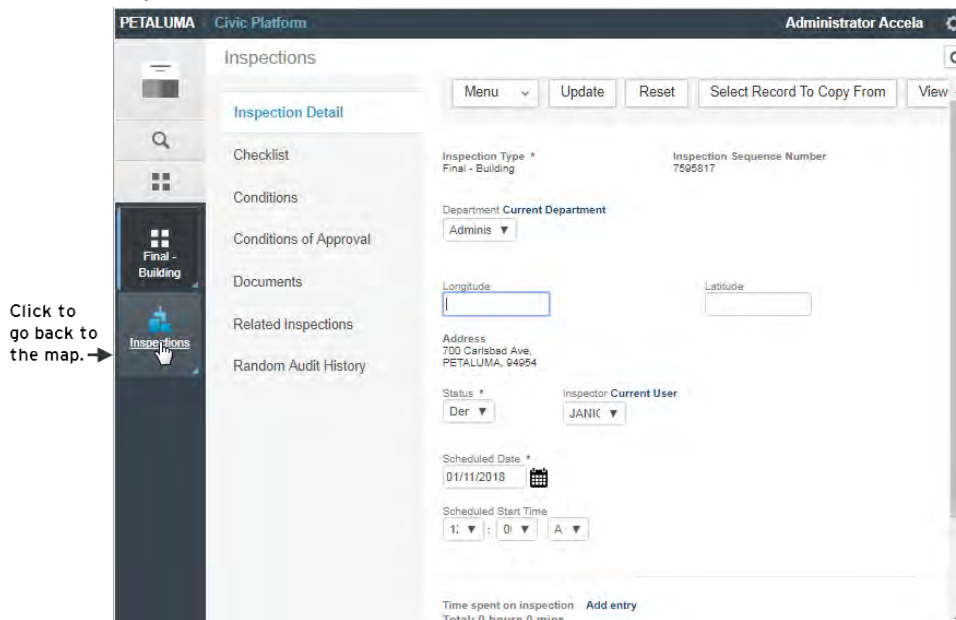


3. On the **Records** panel, you can:

- Hover your mouse over an inspection to highlight it on the map:



- Click an inspection link to see its details:



To go back to the plotted map, click the current **Inspections** workspace.

4. To go back from the map to the Inspections list, click the back arrow:

Click to go back to Inspections list.

The screenshot shows the Civic Platform interface. At the top, the header includes 'PETALUMA Civic Platform' on the left and 'Administrator Accela' with a settings gear icon on the right. Below the header is a search bar with the placeholder text 'Find address or parcel'. The main area is a map of a residential neighborhood with streets like 'SEMPTE CT', 'YELLOWSTONE CT', 'LASSSEN PL', 'PRINCE ALBERT ST', 'RAINIER AVE', and 'CARLSBAD CT'. A blue location pin is visible on the map. On the right side, there is a 'RECORDS' panel with a '3 Inspections' header. Below this header, there are three inspection entries:

- Final - Building - 7595817**  
AMS/Water/JESSIE/ASSET  
700 Carlsbad  
PETALUMA 94954  
Denied  
JANICE ZH  
01/11/2018 00:00AM
- Other Encroachments - 7595814**  
Building/Mechanical/Commercial/Ai...  
Commercial Air Condition  
99 LASSEN  
PETALUMA, CA 94952  
Pending  
01/12/2018 AMPM
- Other Encroachments - 7595813**  
Planning/Planning Permit/ENCROA...  
100 PRINCE ALBERT  
PETALUMA, CA 94952  
Accepted  
Bob Jones  
01/11/2018 AMPM

An arrow in the top left corner points to a back arrow icon in the navigation bar, indicating the action to return to the inspections list.

## Using the Map to Create Inspections

From the map dashboard, inspectors can select parcels or addresses on the map, select records, and schedule inspections. Accela GIS also allows multiple inspections to be created on multiple records in the same transaction.

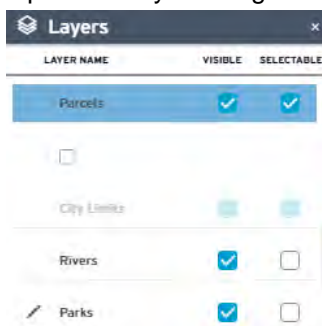
### Topics:

- [Creating inspections from the map](#)
- [Configuration](#)

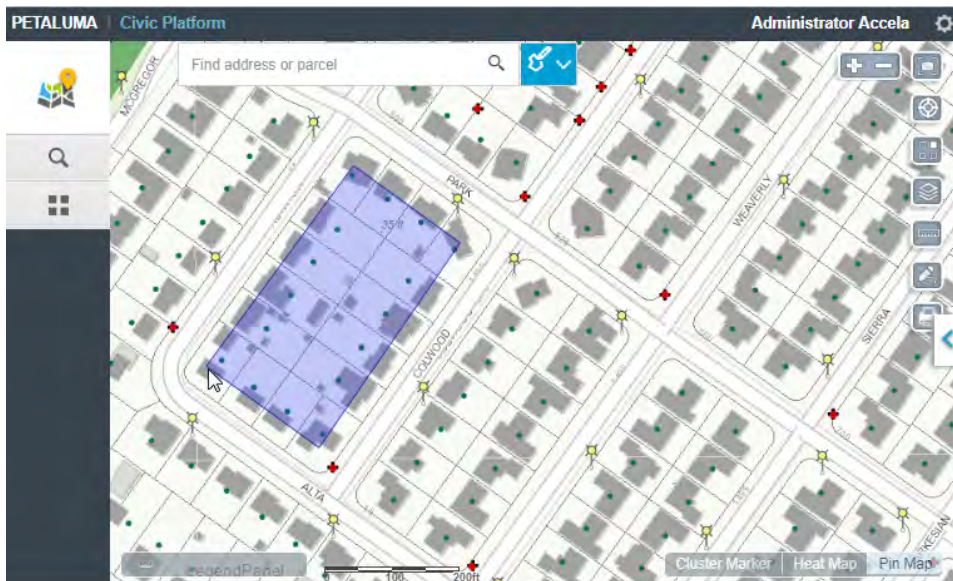
### Creating inspections from the map

To create inspections from a map:

1. Open the Map dashboard.
2. Open the Layers widget to make sure the Parcel layer is selectable on your map view:

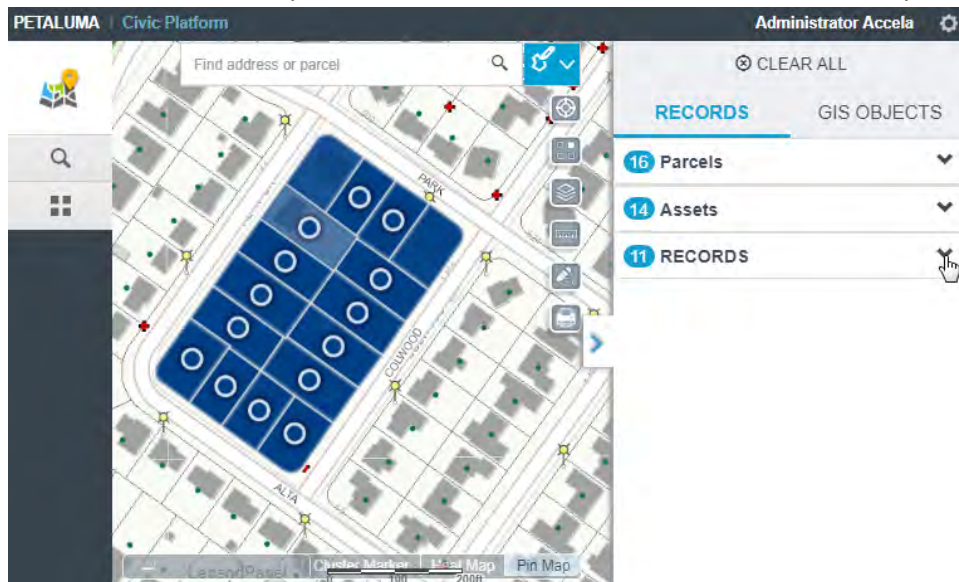


3. Select the parcels for inspection:



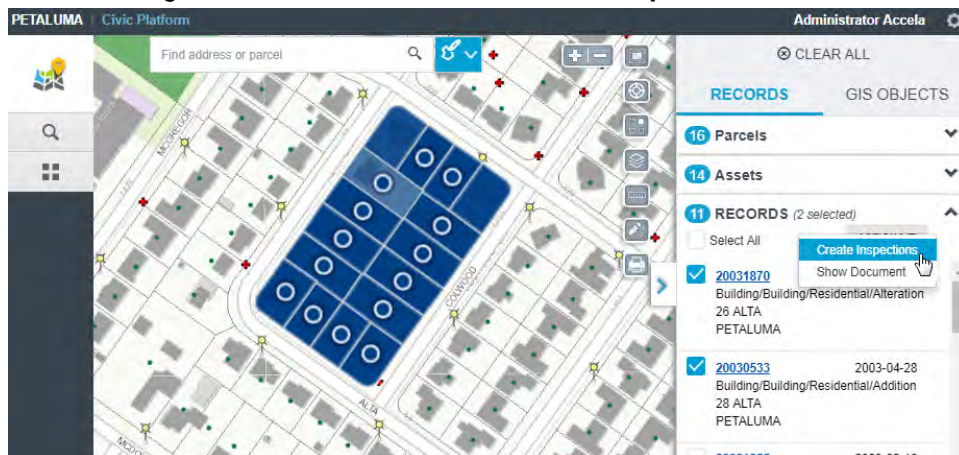
The map Contents panel shows related parcels and assets on the **Record** tab and the selected GIS objects on the **GIS Objects** tab.

4. On the **Records** tab, expand the **Records** list to select the records to be inspected:



**Note:** The checkbox is disabled for a record that is closed.

5. After selecting the records, click **Actions > Create Inspections**:



**Note:** The **Actions** menu is disabled until you select a record.

The **Inspections** window displays the selected records.

6. On the **Inspections** window, enter the inspection parameters such as inspection type, and click **Schedule Inspections**:

PETALUMA Civic Platform Administrator Accela

Inspections

Menu Schedule Inspections Cancel Help

Application No.

Selected Records

20031870  
28 ALTA DR, PETALUMA, CA 94952  
20030533  
28 ALTA DR, PETALUMA, CA 94952

← These are the selected records from the map Contents panel.

Inspection Group: --Select--

Available Inspection Types

Inspection Group	Inspection Type

Selected Inspection Types

Inspection Group	Inspection Type

7. Review the inspection details, edit as necessary, and click **Submit** to schedule the inspection:

PETALUMA Civic Platform Administrator Accela

Schedule Inspections

Menu Submit Add Reset Cancel Help

Assign to All:

Department Current Department Inspector Current User Scheduled Date Clear Scheduled Start Time

--Select-- --Select--

	Inspection Type	Scheduled Date		Record ID	Alternate ID	Inspection Group
<input checked="" type="checkbox"/>	1 Final - Building	01/18/2018	Get Next Working Day	03BLD-00000-01216	20031870	BLD
<input checked="" type="checkbox"/>	2 Final - Building	01/18/2018	Get Next Working Day	03BLD-00000-00329	20030533	BLD

Inspection Detail - 1 Final - Building

Menu Apply to All Help

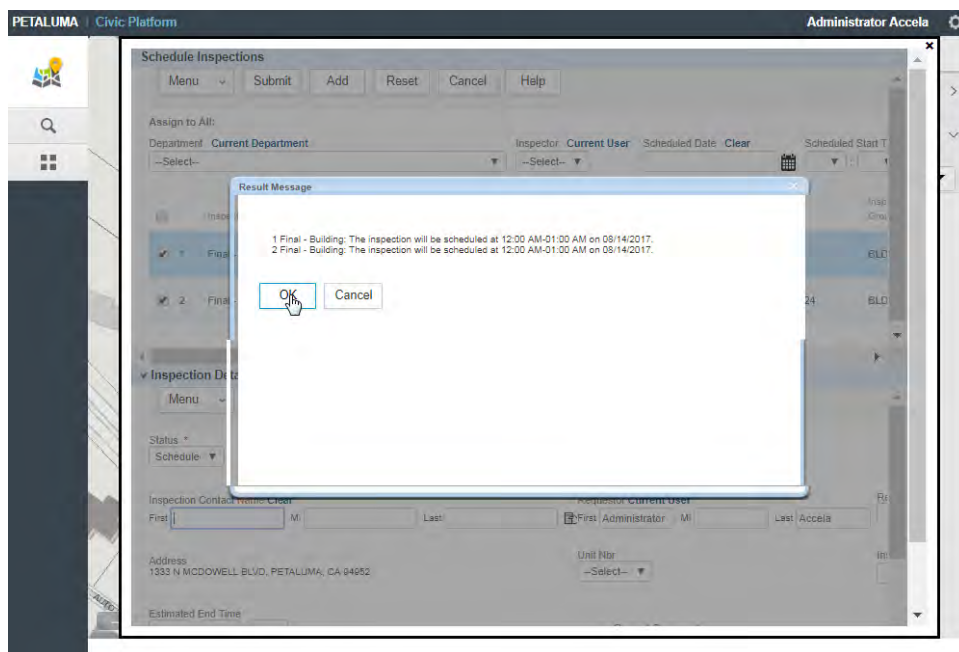
Status \* Estimated Start Time

Schedule

Inspection Contact Name Clear Requestor Current User

First:  Mi:  Last:  First: Administrator Mi:  Last: Accela

8. Click **OK** on the confirmation window:



Note the following:

- The check box next to a record is disabled if the record status is closed.
- The Action menu is disabled until a record is selected.

## Configuration

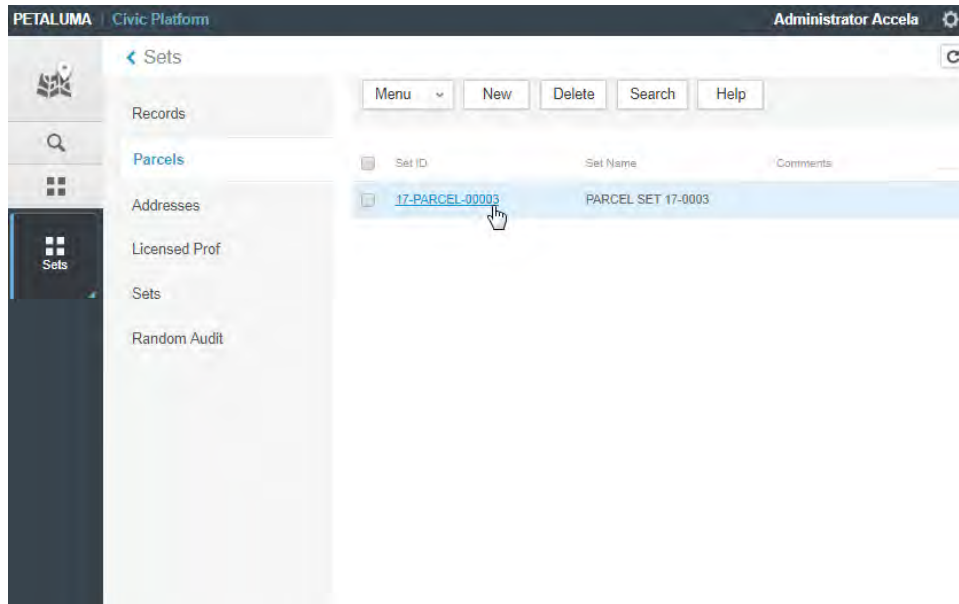
The **Create Inspections** action command requires that the user (or user group) is configured with the **FID 8400-Manage Inspections** permission.



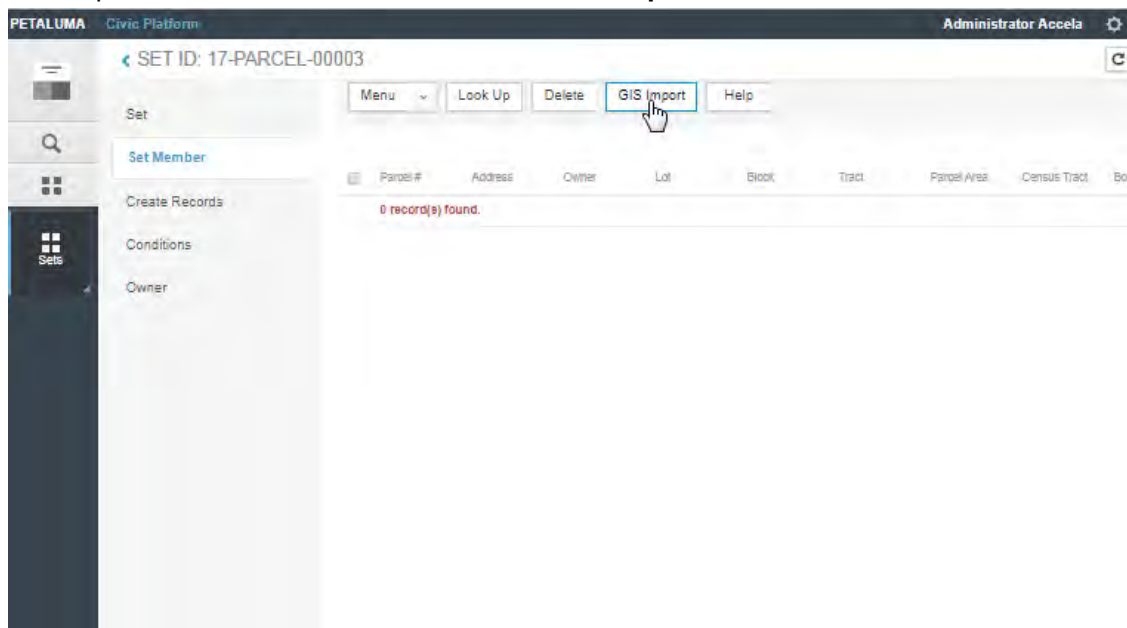
## Importing Parcels from GIS to a Set

Civic Platform back-office users can use **GIS Import** to locate parcels on a map and add them to a set. To import parcels from GIS into a parcel set:

1. From the Civic Platform dashboard, navigate to **Sets > Parcels**.
2. Click the parcel set to which you want to add parcels from GIS:



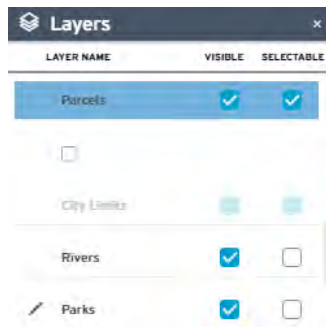
3. On the parcel set, click **Set Member**, and click **GIS Import**:



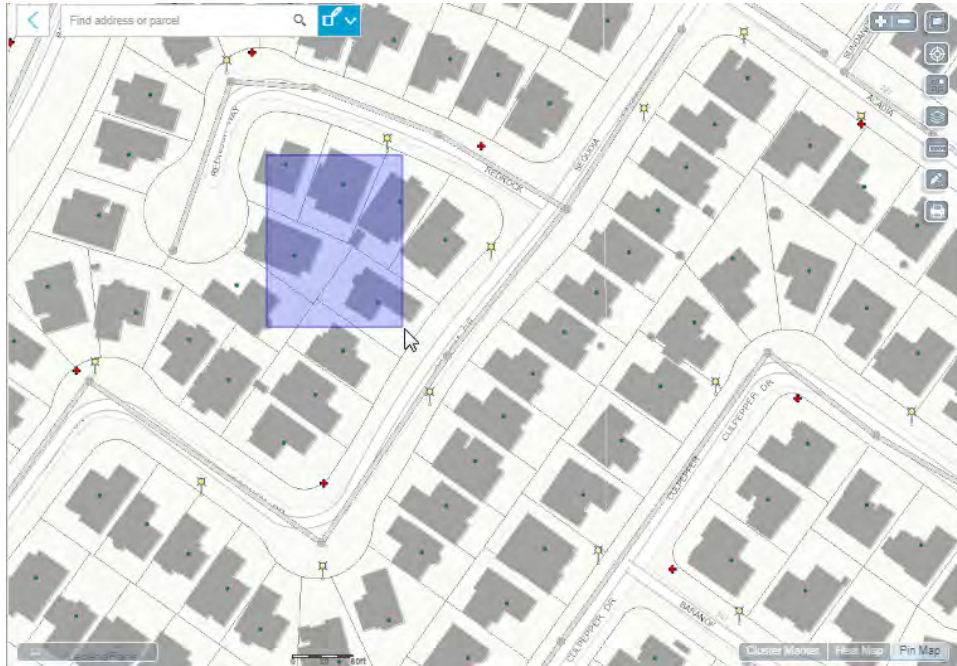
4. When the map opens, you can zoom, pan, or use the search bar to locate the parcels you intend to add to the set.



**Note:** Use the **Layers** widget to make sure the **Parcels** layer is selectable. If the **Parcels** layer is disabled, make sure you are zoomed at a level at which the parcels are visible:

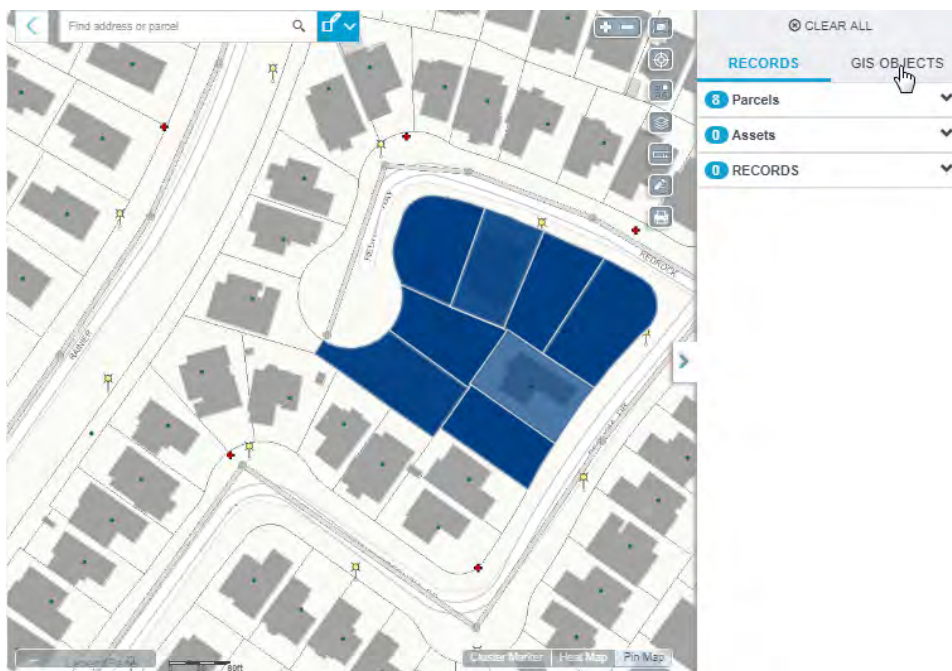


5. Use the selection tool to select the GIS parcels on the map:

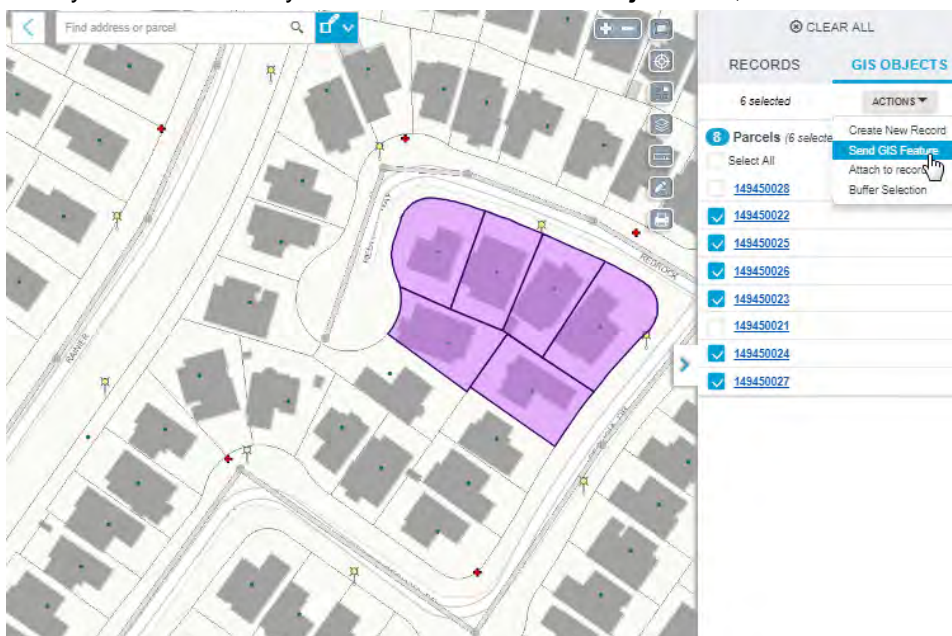


The map Contents panel shows the Records and GIS objects you selected.

6. Click the **GIS Objects** tab to adjust your selection.

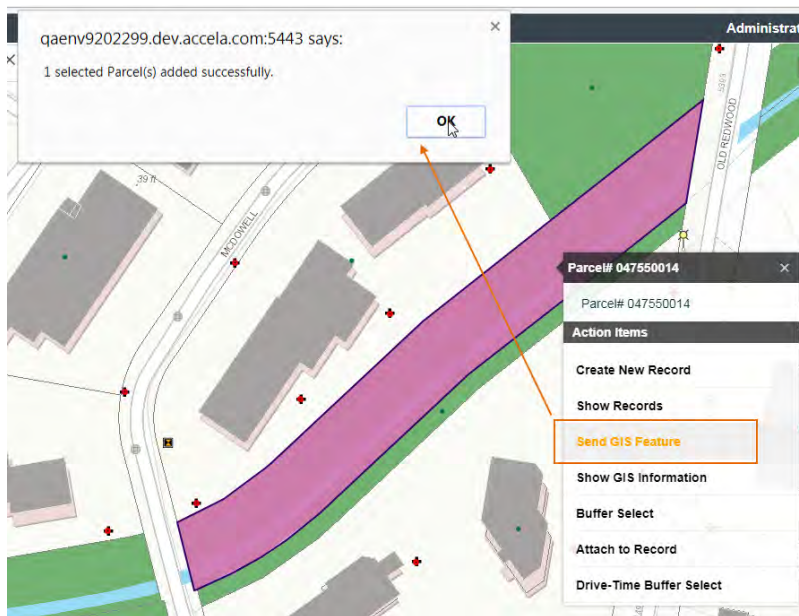


7. After you have finished your selection on the **GIS Objects** tab, click **Actions > Send GIS Features**:



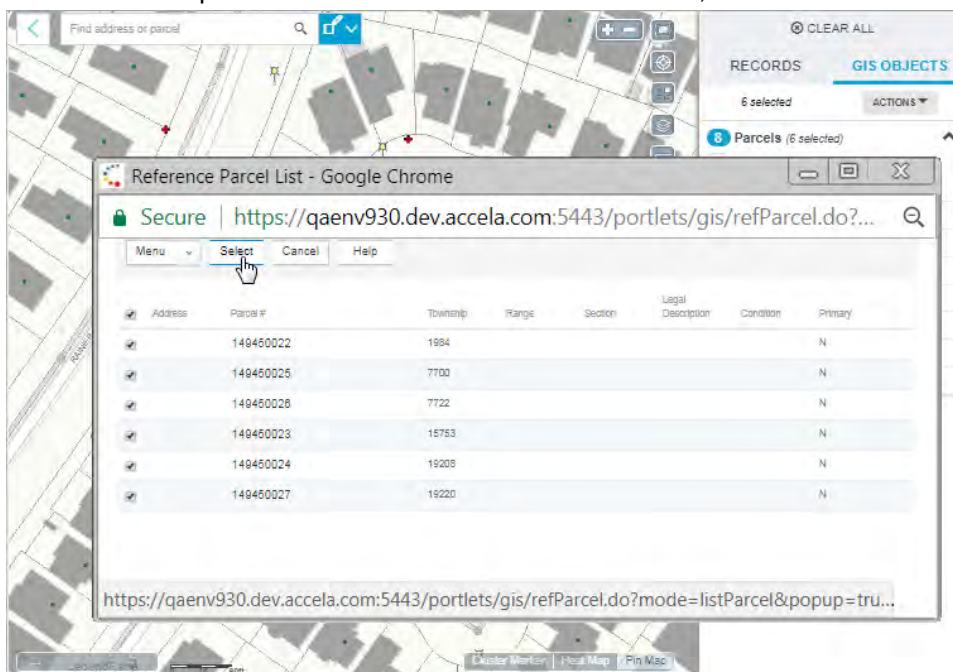
Note the following:

- If multiple GIS parcels are selected, the **Reference Parcel List** window displays the associated reference parcels.  
Only active reference parcels can be added to a set. If a parcel GIS parcel is selected and it is not linked to a reference parcel, it cannot be added to the set.
- If there is only one reference parcel associated with the selected GIS parcel, the **Reference Parcel List** will not be displayed.
- You can also select the **Send GIS Feature** command from the **What's Here** menu:



- The **Send GIS Feature** action currently only works with parcel sets. The **Send GIS Feature** action is not enabled when used in other contexts outside of a parcel set.

8. If you selected multiple GIS parcels that have multiple reference parcels, select the reference parcels to be added to the parcel set from the **Reference Parcel List**, and click **Select**:

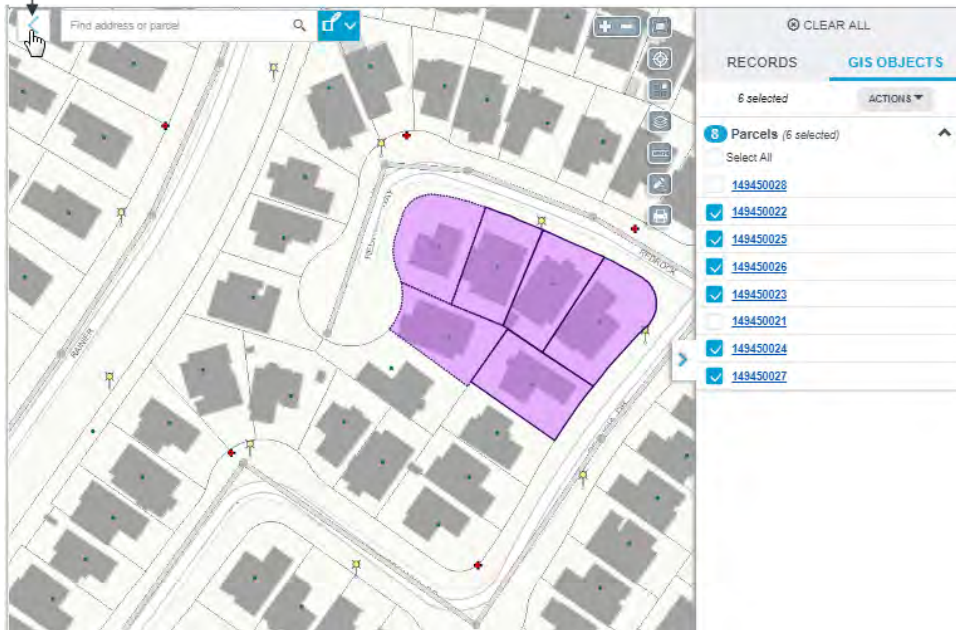


9. Click **OK** on the confirmation window.

The map stays open in case you intend to locate and add more parcels to the set.

10. After your selection is complete, click the Back arrow on the map to go back to the **Set Members** list:

Click to go back to the Set Members list.



The **Set Members** list shows the newly added reference parcels:

PETALUMA Civic Platform Administrator Accela

SET ID: 17-PARCEL-00003

Menu Look Up Delete GIS Import Help

Showing 1-8 of 8

Parcel #	Address	Owner	Lot	Block	Tract	Parcel Area	Census Tract
149450023	417 RED...	VILLANYI					8603.23015
149450028	408 RED...	BROWN					7466.92375
149450027	1669 SE...	BURRAGE					6406.3442
149450024	413 RED...						5846.8396
149450025	409 RED...	MC					5940.04505
149450022	439 RED...	BENELLI					5733.81865

Page 1 of 1

# Accounting

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Choose a topic from the list below to learn more about accounting activities in Civic Platform.

## **Related Information**

[Accounting Overview](#)

[Assessing Fees](#)

[Using the Valuation Calculator](#)

[Invoicing](#)

[Managing Payments](#)

[Handling Refunds](#)

[Managing Trust Accounts](#)

[Working with a Cash Drawer Interface](#)

[Working with a Point of Sale Transaction](#)

[Accepting and Allocating Set Payments](#)

[Troubleshooting the Payment Process](#)

[Examining the Accounting Interface Details](#)

## Accounting Overview

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Use Civic Platform to assess fees, track and process payments, transfer funds from one application to another, or generate refunds as necessary. You can also generate or review certain financial records, including receipts, as needed.



**Note:**

You must start a cashier session before you can process, void, or refund a payment. For information about managing cashier sessions, see [Working with a Cash Drawer Interface](#).

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See [Troubleshooting the Payment Process](#) to resolve any problems or questions.

## Assessing Fees

Many agencies assess certain fees to process an application. For example, your agency might charge a minimum inspection fee of \$25.00 for residential applications. Civic Platform determines the fees that you need to assess by referring to a fee schedule. Your agency administrator can set up a unique fee schedule for each application type.



### Note:

Clients can pay fees only after Civic Platform assesses and invoices the fees.

Fees can be predefined, or Civic Platform can base them on the job value (valuation) of a particular application. See [Using the Valuation Calculator](#) for more information about valuations.

You can assess one or more fee items as long as they appear in the fee schedule for the application that you are working on. You might have fee groups listed that contain one or more fee items. With a fee group, you can update the quantity for all the items in the group with a single action.

### To assess fees

1. Open the Building record you want to work with and locate the application on which you want to assess fees in the list by clicking the record ID link in the Record ID column.

Civic Platform displays the application details.

2. Click the Fees tab.

3. From the **Fee Calc. Factor** field, choose the fee calculation factor that you want to use. You can choose from either a contractor or calculator job value.



### Note:

Job value might not affect all fee items. If Civic Platform calculates a fee item by using a fee formula that incorporates a job value, then the job value affects the fee item.

You can calculate a job value for an application by using the valuation calculator. You can also use a contractor-entered job value. For information about how to use the valuation calculator, see [Using the Valuation Calculator](#).

If the Fee Calc. Factor field does not display, Civic Platform calculates fee items with the default Job Value (Contractor).

4. Click **Add**.

Civic Platform displays a list of fee items and, if any, the fee groups required for the application.

**Building Permit ID: WST-1207020**

Menu ▾ Submit Reset Cancel Help

Go To ▾ Fees (3) GIS (0) Inspections (3) Continuing Education (2) Education (0)

Fee Schedule:  Version:

Fee Calc. Factor: Job Value(Calculator)\$0.00

Subgroup	Fee Code	Fee Item	Qty	Unit
	B_RP	Refund Processing - 200	<input type="text"/>	Each
	B_WSR	Water Supply Report - 233	<input type="text"/>	Each
	B_WST	Water Supply Test - 233	<input type="text"/>	Each

5. From the **Fee Schedule** and **Version** drop-down lists, choose the fee schedule and the version you want to use.

Civic Platform displays a list a fee items and, if any, the fee groups that make up the fee schedule.

6. Do one of the following:



- If the fee schedule has any fee groups, enter a number in the **Group Quantity** field for the desired fee group and/or into the **Quantity** field for the desired fee items.

**Note:**

If you choose to enter a value in both the Group Quantity field and the Quantity field for any fee item, the two values are summed for the fee item when you click Submit.

For example, you have a fee group with fee items A, B, and C. You want to apply a quantity of 10 to A and B, and a quantity of 15 to C. You can enter the common value, 10, in the Group Quantity field, then enter 5 in the C Quantity field. Civic Platform sums 10 and 5 for C when you click Submit, and it displays the end result as 15.

---

- Enter the quantity for each fee item individually in the fee item list.
7. Enter commentary or additional information as needed in the **Note** field for each fee item or the **Group Note** field for each fee group.  
Civic Platform copies the group note into the Note field for each of the fee items in the group.
  8. Click **Submit**.  
Civic Platform assesses the fee based on the values you entered in Group Quantity field and Quantity field, and the fee calc factor you selected.
  9. If needed, use **Undo** to clear the form and roll the fee list back to its previous status.

**To edit or delete fee items**

1. Choose the desired item in the Fee Item column.
2. Do one of the following:
  - To edit, enter a new value in the **Quantity** field and click **Submit**.
  - To delete, select the fee item(s) you want to remove, then click **Delete**.

## Using the Valuation Calculator

Civic Platform includes an automatic valuation calculator for job values. This value is unique for each application. Civic Platform calculates total valuation based on user entry and pre-defined unit cost. The job value for an individual application is the sum of all valuations for that application.



### Note:

Occupancies are pre-defined by your agency administrator. Occupancies can include residences, banks, auditoriums, intended developments, and building materials.

In addition to user entry of valuations, your agency administrator can set up valuations for pre-defined items such buildings or types of work. Civic Platform calculates the total job value for a project by using either type of valuation singly or by using a group of valuations. Civic Platform then calculates or adjusts any fees as appropriate.

When you need to do so, you can edit or delete the individual valuations that make up the total job value. Any changes that you make to the total job value can affect assessed fees. Your changes do not, however, affect invoiced fees.

Some agencies provide application specific fields that contractors can use to supply an estimated job value. If your agency collects this information, you can choose which value - system-calculated or contractor-provided - when assessing fees.



### Note:

This statement applies only to the fee items with a fee formula that incorporates a job value. Your agency administrator sets up fee items and determines which fee formula to use.

## Adding Valuations

As users assess fees for new jobs, you can add to add new valuations to your system. A job valuation lets you determine or estimate the market value for a certain type of occupancy.



### Note:

Although you can make any adjustments by using the Valuation Calculator to change the total job value after you invoice fees, your changes do not affect fees that you have already invoiced, nor do they affect the total invoice amount. Your changes affect any fees that you have assessed but have not yet invoiced.

For example, a Type I apartment complex can include only one bedroom unit and have a value that is less than Type III apartments, which include additional bedrooms and other amenities. A job value also reflects the value of the work that must occur for occupancy. For example, a Type III apartment complex might require a certain number of man-hours to complete, or a certain type of building materials.

### To add a valuation

1. Open the record you want to work with and locate the application on which you want to assess fees. Civic Platform displays the application details.
2. Click the Valuation Calc tab.  
Civic Platform displays the Valuation Calc details.

Building Permit ID: WST-1207019

Submit Add Delete Cancel Help

Go To > Valuation Calc (2) Meetings (0) Workflow Workflow History (0) Activities (0) Renewal (0) Renewal Info Trust Accounts (0)

Occupancy	Unit Type	Unit Amount	Unit	Version	Unit Cost	Job Value	
<input type="checkbox"/>	Filter by Record Type	Multiplier	1.0000	Extra Amount	0.00	Total Job Value: \$17,558,100.00	
<input type="checkbox"/>	A-1 Assembly, theater wo stage	IA	60000	sq ft	08/2011	\$ 195.09	\$11,705,400.00
<input type="checkbox"/>	A-1 Assembly, theater wo stage	IA	30000	sq ft	08/2011	\$ 195.09	\$5,852,700.00
						Total Job Value: \$17,558,100.00	

**3. Click Add.**

Civic Platform adds a new row to the list of occupancies.

**4. Complete the fields with data as available. See [Valuation Calculator Fields](#) for field descriptions.**

**5. Click Submit.**

Civic Platform saves the valuation.

## Invoicing

---

You can configure Civic Platform to assess certain fees automatically. After Civic Platform assesses fees, you can invoice fees individually or as part of a group. Each time you invoice one or more fees, Civic Platform generates a unique invoice number.



**Note:**

You can review itemized fee items on an invoice. However, you cannot edit or delete data after you invoice a fee.

If you need to remove an invoiced fee, you can void the fee and apply a credit toward the total payment on invoice.

### Topics

- [Generating Invoices](#)
- [Printing Invoices](#)
- [Voiding an Invoiced Fee](#)

### Generating Invoices

You can generate an invoice from the record portlet, or you can also generate an invoice from the Payment Processing portlet. When you generate invoices from the Payment Processing portlet, your agency can configure Civic Platform so that it creates a single invoice for a group of records or separate invoices for each record.

#### To generate an invoice from an application

1. Open the Building record you want to work with and open the application for which you want to generate an invoice.  
Civic Platform displays the application details.
2. Click the Fees tab.  
Civic Platform displays a list of assessed fees.
3. Select the fee(s) you are invoicing.
4. Click **Invoice**.  
Civic Platform generates an invoice and displays an invoice number.
5. To view the invoice, click the invoice number link.  
Civic Platform displays the invoice in a new browser window. Use your browser's print command to print the invoice as needed.

#### To generate invoices from the Payment Processing Portlet

1. Locate the Building record you want to work with, then navigate to the Payment Processing portlet.
2. Click the Invoices tab.  
Civic Platform displays the Payment Processing - Invoices portlet.

Payment Processing

Menu Add Fee Items Void Invoice Delete Help

Payment Refund Void Invoices History

Record ID State License # Receipt Number Invoice Number Transaction ID

Fee Total \$0.00

Record ID	Address	Invoice#	Fee Code	Fee Item	Quantity	Unit	Fees	Status	Adjust	Date Assessed	Notes
0 record(s) found.											

- Search by Record ID or State License # for the items that you want to invoice. See [Using the Search Features](#) for information about conducting a search.

Civic Platform displays a list of the fees that correspond to the Search values entered.

Payment Processing

Menu Add Fee Items Void Invoice Delete Help

Payment Refund Void Invoices History

Record ID State License # Receipt Number Invoice Number Transaction ID

Fee Total \$11.00

1 2

Record ID	Address	Invoice#	Fee Code	Fee Item	Quantity	Unit	Fees	Status	Adjust	Date Assessed
<input type="checkbox"/> 13CAP-00000046			MASTER PLAN	Master Pl...	2	Valuation	\$1.00	NEW		01/15/2013
<input type="checkbox"/> 13CAP-00000046			PLANCHCK	Plan Chec...	1	Valuation	\$0.00	NEW		01/15/2013

- Search for additional Record IDs or State License #s as required until all items that you want to invoice, display.
- Select each item that you want to invoice then click **Invoice**.



#### Note:

You cannot create an invoice for a previously invoiced item. To easily separate the items from invoiced items, sort the displayed records by Status (click the Status column header to sort). You can also select and delete previously invoiced items from the fee list, leaving only those items that you want to invoice. To select all items simultaneously, mark the check box at the top of the Record ID column

Depending on how your agency configured Civic Platform, Civic Platform does one of the following:

- It creates a single invoice for all of the selected items.
- It creates a unique number for each invoiced Record ID.
- It prompts you to select an invoice numbering method to use when it creates the invoices. Civic Platform creates invoices for the selected items.

## Printing Invoices

You can view invoices or print invoices individually or as a group (batch) to meet the demands of your agency.

If enabled, you can batch process groups of invoices together using the Invoice Batch portlet. From this portlet, you can collect all invoices for a given date range into a batch and print each invoice to mail to the responsible party. However, you do not need to link an invoice to a batch unless you to associate it with other invoices.

### Topics

- [Creating an Invoice Batch](#)
- [Adding Invoices to a Batch](#)

- [Removing Invoices from a Batch](#)
- [Printing Invoices](#)

## Creating an Invoice Batch

You can group invoices together to create a batch. For example, you can create batches by Licensed Professional, grouping invoices associated with their projects.



### Note:

You can only associate an invoice to one batch at a time. If you want to include the invoice in the new batch, Civic Platform automatically removes it from the other one.

### To create a batch

1. Find the record you want to work with, then navigate to the Invoice portlet. Civic Platform displays a list of invoices.

The screenshot shows the 'Invoices' portlet interface. At the top, there are buttons for 'Menu', 'Create Batch', 'Add Invoices to Batch', 'Remove Invoices from Batch', 'Search', and 'Help'. Below these is a table of invoices with columns: Invoice Number, Record ID, Invoice Batch Number, Invoice Batch Date, Invoice Amount, Invoice Status, Invoice Date, and Printed. The first row is selected, showing Invoice Number 367986, Record ID 13CAP-000..., Invoice Batch Number, Invoice Batch Date, Invoice Amount \$24.00, Invoice Status, Invoice Date 01/22/2013, and Printed N. Below the table, there is a section for 'Invoice #: 367986' with a 'Help' button. Underneath, there is an 'Invoice Detail' section showing 'Permit ID #: 13CAP-00000037', 'Invoice #: 367986', and 'Invoice Date: 01/22/2013 08:19:27'. At the bottom, there is a table with columns 'Period', 'Fee Item', 'Qty', and 'Fee', showing 'FINAL', 'No Charge', '12', and '\$24.00'.

2. Select the invoices that you want to add to the batch.
3. Click Create Batch. Civic Platform creates the new batch and then auto assigns an Invoice Batch Number.

The screenshot shows the 'Invoices' portlet interface after creating a batch. The table of invoices is the same as in the previous screenshot, but the 'Invoice Batch Number' column now has a value 'S' for the selected invoice (367986). A red box highlights the 'Invoice Batch Number' column header and the 'S' value in the first row. A red message at the top of the table area says '\*S created successfully.'.

## Adding Invoices to a Batch

You can add invoices to an existing batch report as needed.

### To add invoices to a batch

1. Find the record you want to work with, then navigate to the Invoice portlet.  
Civic Platform displays a list of invoices.
2. Use search to locate the invoice(s) you want, then select the invoice(s) to add to the batch.
3. Click Add Invoices to Batch.  
Civic Platform displays the Batch # pop-up window.
4. Enter the batch number for the batch you are adding the invoice to.
5. Click Submit.  
Civic Platform adds the invoices to the selected batch.

## Removing Invoices from a Batch

Users are able to remove invoices from a batch report. For example, a batch previously included invoices within a two-week period, but now you want to view only the last ten days.

### To remove invoices from a batch

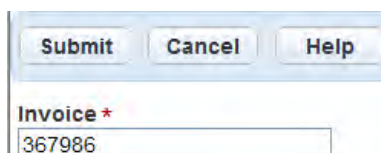
1. Find the record you want to work with, then navigate to the Invoice portlet.  
Civic Platform displays a list of invoices.
2. Use search to locate the invoice(s) you want to delete, then select each invoice you want to remove from the batch.
3. Click Remove Invoices from Batch.  
Civic Platform asks you to confirm the removal.
4. Click OK.  
Civic Platform removes the invoice from the batch.

## Printing Invoices

You can print invoices individually or in batches as required.

### To print an individual invoice

1. Find the record you want to work with, then navigate to the Invoice portlet.  
Civic Platform displays a list of invoices.
2. Click the invoice you want to print.
3. Click Reports then select Single Invoice Report from the drop-down list.  
Civic Platform displays the Single Invoice Report pop-up window.



4. Enter the invoice number you want to print.



#### Note:

The selected invoice number auto-populates in the Invoice field. Enter a different number if you want to print a different invoice.

---

5. Click **Submit**.

Civic Platform displays the Invoice Report.

6. Click **Print**.

### To print an invoice batch

1. Find the record you want to work with, then navigate to the Invoice portlet.

Civic Platform displays a list of invoices.

2. Click an invoice belonging to the batch you want to print.

3. Click **Reports**, then choose **Batch Invoice Report** from the drop-down list

Civic Platform displays the Parameter Value Selector pop-up window.



**Note:**

If you do not click an invoice that belongs to a batch, Civic Platform displays the error message “Please enter an existing batch number” when you click the Report button.

---

4. Enter the batch number you want to print in the **ClientNum** field.

5. Click **Submit**.

Civic Platform displays the Invoice Report.

6. Click **Print** to print the report.

## Voiding an Invoiced Fee

When you void a fee, you reduce the total amount owed on a record, and you can then generate a new invoice. After you assess and invoice a fee, you can void the fee directly from a record, a point of sale, or the Payment Processing portlet.



**Note:**

If there is an existing payment toward a fee that you need to void, you can invoice the fee again, and then apply a credit toward the invoice.

---

Most agencies typically restrict the ability to void an invoiced fee to supervisors or other specific individuals. If you do not see a **Void** button in the toolbar, you cannot void invoiced fees.

### Topics

- [Voiding Invoiced Fees from a Record](#)
- [Voiding Invoiced Fees from the Payment Processing Portlet](#)
- [Voiding Invoiced Fees from the Point of Sale Portlet](#)

## Voiding Invoiced Fees from a Record

Voiding an invoiced fee from a record allows you quickly resolve minor billing errors.

### To void an invoiced fee

1. Navigate to the record portlet you work with and use Search to locate the record you want. Click the record ID link in the Record ID column to open the record details portlet.

Civic Platform displays the record details.

2. Click the Fees tab.



Civic Platform displays a list of assessed fees for the record.

3. Select the invoiced fee(s) that you want to void (Invoiced fees have an invoice number and an "Invoiced" status).
4. Click **Void**.  
Civic Platform displays a Void Fee Item pop-up window.
5. Select a void reason from the **Reason** drop-down list, and enter any pertinent comment describing more for the Void action, if desired.
6. Click **Submit**.  
Civic Platform saves your comments and closes the pop-up window.
7. Select the voided fees. You can identify a voided fee by viewing the Status column.
8. Click **Invoice**.  
Civic Platform decreases the total fee amount and generates a new invoice.

### **Voiding Invoiced Fees from the Payment Processing Portlet**

When you void invoiced fees from the Payment Processing portlet, you can void fees for a single record, or for multiple records simultaneously.

#### **To void invoiced fees from the Payment Processing Portlet**

1. Find the Building record you want to work with, then navigate to the Payment Processing portlet.
2. Click the Invoices tab.  
Civic Platform displays the Payment Processing - Invoices portlet.
3. Search for the invoiced fee items that you want to void. You can search by Record ID, State License #, Receipt Number, Invoice Number, or Transaction ID.  
Civic Platform displays a list items that match your search criteria.
4. Repeat the Search until all items that you want to void, display in the list.  
Civic Platform updates the Total Payments amount as you add items to the list.
5. Select each item you want to void.
6. Click **Void**.  
Civic Platform displays a Void Fee Item pop-up window.
7. Select a void reason from the Reason drop-down list, and enter any pertinent comment describing more for the Void action, if desired.
8. Click **Submit**.  
Civic Platform voids the selected fee items.
9. To view the transaction details, click the History tab and select the desired Transaction ID. Drill down to view additional details, as desired.

Payment Refund Void **Invoices** History

Transaction ID: \_\_\_\_\_ Receipt Number: \_\_\_\_\_ Invoice Number: \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_ Transaction Type: --Select--

Transaction List:

Transaction ID	Date	User	Amount	Type	Receipt#	Invoice#
<a href="#">51</a>	01/22/2013	Sandra	\$100.00	Void Fee Item		
<a href="#">50</a>	01/19/2013	Sandra	\$100.00	Paid	128	
<a href="#">49</a>	01/19/2013	Sandra	\$100.00	Paid	127	
<a href="#">48</a>	01/17/2013	Sandra	\$1.00	Void Payment		
<a href="#">47</a>	01/17/2013	Sandra	(\$300.00)	Refund	79	
<a href="#">46</a>	01/17/2013	Sandra	\$1.00	Paid	78	
<a href="#">45</a>	01/16/2013	Sandra	\$600.00	Void Fee Item		
<a href="#">44</a>	01/16/2013	Sandra	\$100.00	Paid	53	
<a href="#">43</a>	01/16/2013	Sandra	(\$10.00)	Refund	52	
<a href="#">42</a>	01/16/2013	Sandra	\$100.00	Paid	51	

Transaction ID: 51

Fee Total: \$100.00

Record ID	Address	Invoice#	Fee Code	Fee Item	Quantity	Unit	Fees	Status	Adjust	Date Assessed
<a href="#">13CAP-00000020</a>		100	FEE2	F2	1		\$100.00	VOIDED		01/22/2013

## Voiding Invoiced Fees from the Point of Sale Portlet

You can void invoiced fees of a record from the Point of Sale portlet.

### To void invoiced fee items from the Point of Sale portlet

1. Navigate to the Point of Sale portlet.  
Civic Platform displays a list of point of sale transactions.
2. In the **Transaction ID** column, click the link to the point of sale transaction you want.  
Civic Platform displays the transaction details.
3. Click the Fee Items tab.  
Civic Platform displays the fee items list.
4. Select the fee items you want to void.
5. Click **Void**.  
Civic Platform displays the Void Fee Item window.

**Void Fee Item**

Menu ▾ Submit Reset Cancel Help

Reason: --Select--

Comments:

6. Select a reason and enter the comments.
7. Click **Submit**.  
Civic Platform voids the invoiced fee items.

Transaction Detail   Fee Items   Payment

Fee Item POS\_BUILDING voided successfully.

Fee Total                    \$110.00

<input type="checkbox"/>	Invoice #	Category	Fee Code	Fee Item	Date Assessed	Quantity	Unit	Unit Price	Amount	Status
<input type="checkbox"/>	388887	POS_BUILDING	POS	POS_BUILDING	11/13/2012	3		\$10.00	\$30.00	CREDITED
<input type="checkbox"/>	388884	POS_BUILDING	POS	POS_BUILDING	11/13/2012	4		\$10.00	\$40.00	INVOICED
<input type="checkbox"/>	388884	POS_BUILDING	POS	POS_BUILDING	11/13/2012	5		\$10.00	\$50.00	INVOICED
<input type="checkbox"/>	388886	POS_BUILDING	POS	POS_BUILDING	11/13/2012	2		\$10.00	\$20.00	INVOICED

## Managing Payments

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Use Civic Platform to record and process payments that your agency receives. You can apply payments to one or more invoices for one or more accounts as needed. Your agency's cashier can use Civic Platform to consolidate payments for fee items from different records, or to pay fees for one record at a time.

**Note:**

Before a cashier can process a payment, you must add fee items to the record and invoice the licensed professional or owner. For instructions on how to invoice a fee, see [Invoicing](#).

You must start a cashier session before you can process a payment. For information about managing cashier sessions, see [Working with a Cash Drawer Interface](#).

---

**Topics**

- [Receiving a Payment for a Record](#)
- [Reviewing Failed Payments](#)
- [Transferring Funds from One Record to Another](#)
- [Generating Receipts](#)
- [Voiding a Payment](#)
- [Viewing the Payment History for a Record](#)
- [Processing Record Payments Using a Barcode Scanner](#)
- [Processing Payments for Multiple Records](#)
- [Allocating Payments](#)

### Receiving a Payment for a Record

You can work from both the Payment tab on the Record portlet or the Payment Processing portlet to receive payments for records.

If your agency is an on-premise agency, a third-party clearinghouse processes your payments.

---

**Note:**

You must start a cashier session before you can process a payment. If you do not, Civic Platform automatically displays a cashier session window. You can click the New Session button to open a session or continue a previous session by clicking the red X on the top right-hand corner to close the pop-up window.

---

**Topics**

- [Receiving a Payment in the Record Portlet](#)
- [Receiving a Payment in the Payment Processing Portlet](#)

### Receiving a Payment in the Record Portlet

1. Navigate to the Record portlet.
2. Use search to locate the record you want to work with (see [Using the Search Features](#) ).
3. Click the Payment tab.

#### 4. Click **Pay**.

Civic Platform displays the Payment Details page.

Record ID: ORE12-00000010

Menu Save Pay More Reset Cancel Reports Help

Go To Record Addtl Info App Specific Info Tables (0) Fee (0) Payment Payment History Summary Related Records Examination

Amount: \*  
0.00

Reference #:

Received:  
--Select--

Method: \*  
Cash

CC Auth. Code:

Comment:

Trust Account:  
--Select--

Payor:

#### 5. Select a payment method from the **Payment Method** drop-down list.

The Payment portlet displays the associated fields for the payment method.

#### 6. Enter the payment details for the selected payment method.

See [Common Payment Details](#), [Cash Payment Details](#), [Credit Card Payment Details](#), and/or [Check Payment Details](#) for field definitions.

#### 7. If there are multiple payment methods or multiple payees for the payment, click **Pay More**, and repeat the previous two steps.

#### 8. Click **Save**.

If the payment equals or exceeds the total amount due, the payment is complete. Civic Platform displays a receipt summary and receipt as confirmation of the payments.

If the payment is less than the total amount due, you need to allocate the paid amount among the fee items before completing the payment (see [Allocating Payments](#)).

## Receiving a Payment in the Payment Processing Portlet

#### 1. Navigate to the Payment Processing portlet.

#### 2. Click the Payment tab.

#### 3. Use search to locate the record you want to work with (see [Using the Search Features](#) ).



#### Note:

The Payment Processing portlet ignores the records that have negative outstanding total of its fee items.

Civic Platform displays the results in the Payment portlet.

#### 4. Select the record in the Payment list to which you want to apply a payment and click **Pay**.

Civic Platform displays the Payment Details page.

The screenshot shows a web form for processing a payment. At the top, there are buttons for 'Pay', 'Add', 'Delete', and 'Help'. Below this is a 'Payment' section with a table:

Payment Method	Account Number	Amount
<input type="checkbox"/> Check		380.00

Below the table, there are summary fields: Fee Total: \$380.00, Total Tended: \$380.00, Balance: \$0.00, Change: \$0.00, and Unapplied Credit: \$0.00. To the right is the 'Check Information' section with various input fields and dropdown menus for check details and recipient information. A 'Save' button is located at the bottom of the form.

5. Select a payment method from the **Payment Method** drop-down list.  
The Payment portlet displays the associated fields for the payment method.

6. Enter the payment details for the selected payment method.  
See [Common Payment Details](#), [Cash Payment Details](#), [Check Payment Details](#), or [Credit Card Payment Details](#) for field definitions.



**Note:**

Some agencies set up a magnetic card reader to automatically read the credit card information (card type, account number, expiration date, first name, last name, cardholder's name) into the corresponding Civic Platform fields.

7. If you have multiple payment methods or multiple payees for the payment, click **Save** to save the payment details you just entered, and then click **Add** and repeat the previous two steps.

8. Click **Pay**.  
Civic Platform displays a receipt summary and receipt as confirmation of the payments.

If your attempt to process the payment fails, see [Reviewing Failed Payments](#) for information before proceeding anew.

Civic Platform automatically allocates the paid amount among the fee items in the payment. For information about allocation rules, see [Allocating Payments](#).

## Reviewing Failed Payments

There are many reasons why a payment might fail. Review the possibilities listed in this section with the citizen before you try to process a payment again.

### Credit Card Related Payment Issues

- It is not uncommon for a credit card authorization request to fail before the request finally clears. Retry the payment if the request fails.
- The request for payment has exceeded the credit card limit.
- Invalid Address Information: The address supplied on the registration form does not match the billing address that the credit card issuer has on file.
- Invalid Credit Card Expiration Information: You (or the customer) entered the credit card account number or the credit card expiration date incorrectly. Check the numbers again and re-enter.

- Invalid Card Validation Number (CVN): The Card Validation Number from the back of the card is incorrect. Please check the CVN and re-enter.
- The account might have fraud protection services. Contact the financial institution to authorize the transaction.
- The account might have insufficient funds. Contact the financial institution and verify the available credit limit.

### **Check Related Payment Issues**

- The check might not have a signature.
- The account might have fraud protection services. Contact the financial institution to authorize the transaction.
- The account might have insufficient funds. Contact the financial institution and verify the available credit limit.

### **Transferring Funds from One Record to Another**

When a related record has excess funds, you can transfer those funds to the record that you are currently working on. When you transfer funds, Civic Platform creates an entry in the transaction section of the invoice for both the “transfer to” and the “transfer from” records. You can view information about a fund transfer on the automatically generated receipt, as well as the payment history.

#### **To transfer funds**

1. Navigate to the portlet you want, and use search to locate the record you want to work with.
2. Click the record ID link in the Record ID column.  
Civic Platform displays the record details.
3. Click the Payments tab.  
Civic Platform displays the main payment summary.
4. Click **Fund Transfer**.  
Civic Platform displays the fund transfer application search form.
5. Enter search criteria as needed to locate the record that you want.
6. Click **Submit**.  
Civic Platform displays search results.
7. Select the application from which you want to transfer the funds and click **Select**.  
Civic Platform displays the Fund Transfer From details. You can see the total amount available for transfer.

Record ID: 13CAP-0000019

Menu ▾ Submit Reset Cancel Help

Go To ▾ 1 (0) Payment Payment History PM Schedule Professionals (1) Related Records Renewal (0)

Application 13CAP-00000018	Available Amount \$580.00	Transfer Amount <input type="text"/>
Method Fund Transfer ▾	Received --Select-- ▾	Comment <input type="text"/>

[check spelling](#)

## 8. Complete the following fields:

- |                        |  |
|------------------------|--|
| <b>Transfer Amount</b> | Enter the amount you want to transfer.   |
| <b>Method</b>          | Currently there is only one transfer method to choose from: Fund Transfer. Civic Platform selects this value by default. |
| <b>Comment</b>         | Enter comments or notes about the transfer.  |

## 9. Click **Submit**.

Civic Platform confirms a successful transfer and generates a Fund Transfer transaction and receipt for each application involved in the transfer.

## Generating Receipts

After you accept a payment or issue a refund, you can need to generate a receipt as confirmation of the transaction. When you process multiple items, you can generate a transaction summary receipt or a transaction report to provide a detailed breakdown of each action in the transaction group.

### Topics

- [Generating a Payment Receipt from an Application](#)
- [Viewing a Receipt from the Payment Processing Portlet](#)
- [Viewing a Transaction Receipt Summary from the Payment Processing Portlet](#)

## Generating a Payment Receipt from an Application

After you accept a payment, you can generate a receipt so that the payee can verify the payment.

### To generate a payment receipt

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Select the payment transactions for which you want to generate a receipt.  
By default, Civic Platform marks all the payment transactions so that they display on the receipt. If you want to remove one or more of the transactions, clear the corresponding box.





**Note:**

If your agency sets the Payment tab to automatically generate a receipt after a transaction is complete, the Generate Receipt page does not display and you can skip steps 4 through 7.

Civic Platform checks all payments that the Generate Receipt page can display. Civic Platform then displays the Invoices information and the receipt and Receipt Summary pop-up pages.

**4. Click Generate Receipt.**

Civic Platform generates a receipt of payment and a receipt summary, then it displays each in a separate window.

Building Permit ID: 13CAP-00003173

(4)

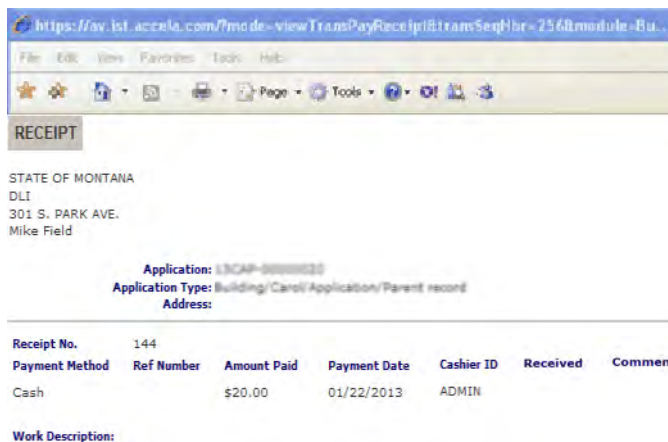
**Total Invoice Amount:** \$88.00      **Terminal #:**   
**Total Payment:** \$51.00          **Cashier ID:** ADMIN  
**Total Balance:** \$37.00          **Date:** 03/20/2013  
**Amount Not Applied:** \$0.00

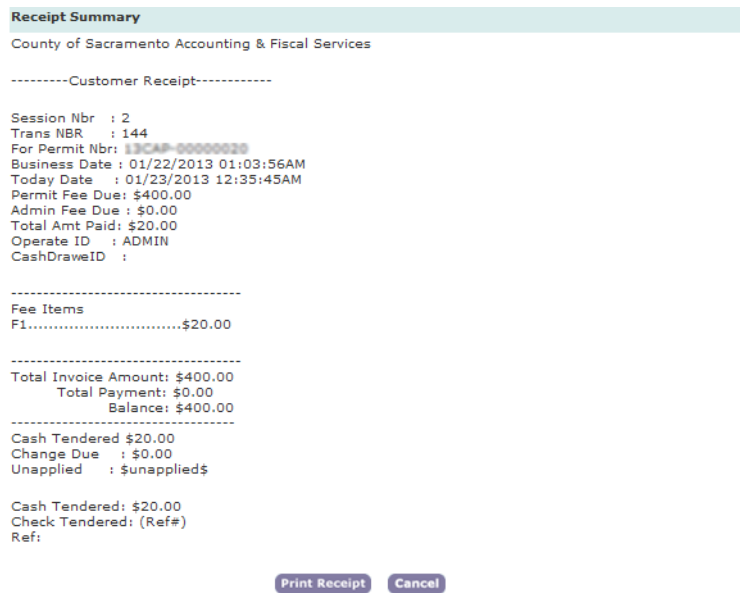
**Invoices**

Invoice #	Amount	Paid in Full	Balance
368444	\$110.00	N	\$37.00
368445	(\$22.00)		\$0.00
368474	\$550.00	Y	\$0.00
368475	(\$550.00)		\$0.00

**Transactions**

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status	Received
<input type="checkbox"/>	Payment	Check	380561	\$0.00	\$0.88	Paid	
<input type="checkbox"/>	Payment	Check	380560	\$0.00	\$30.00	Paid	
<input type="checkbox"/>	Payment	Check	380559	\$0.00	\$0.12	Paid	
<input type="checkbox"/>	Payment	Cash	380558	\$0.00	\$10.00	Paid	
<input type="checkbox"/>	Payment	Check	380557	\$0.00	\$10.00	Paid	





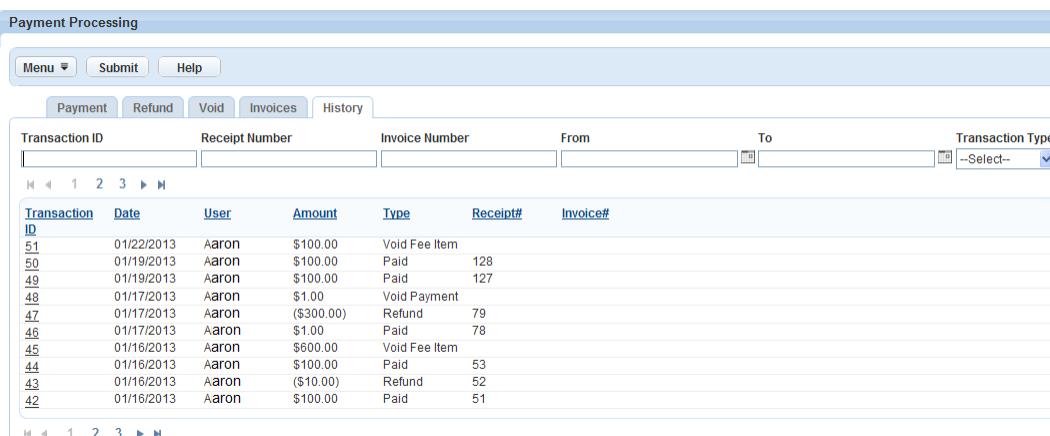
- To view or print the receipt, click the link to the receipt number.  
 You can use your browser’s print command to print the receipt.

### Viewing a Receipt from the Payment Processing Portlet

Depending on how your administrator has configured your system, Civic Platform can automatically generate and display a summary receipt or a transaction report when you complete a transaction through the Payment Processing portlet. However, you can also return to the Payment Processing portlet later so that you can view or print a receipt for an individual item in a particular transaction.

#### To view a transaction receipt for a single item

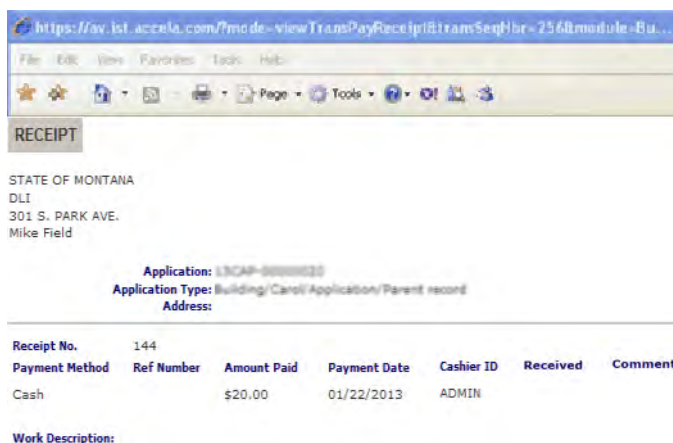
- Navigate to the Payment Processing portlet.
- Select the History tab.  
 Civic Platform displays the Payment Processing - History portlet.



- Locate the desired Transaction ID.  
 If known, enter the Transaction ID, Receipt Number, Invoice Number, Date range of the transaction, or choose the Transaction Type from the drop-down list and press **Enter**.  
 Civic Platform displays the list of transactions that match the specified parameters.
- Select the desired Transaction ID.

Civic Platform displays the list of transactions performed in this group.

5. Select the desired Record ID from the transaction list.  
Civic Platform displays the Record detail portlet.
6. Scroll to the Payment tab.
7. From the Transactions listed on this page, click the desired Receipt #.  
Civic Platform displays the Receipt for you to view and print as desired.

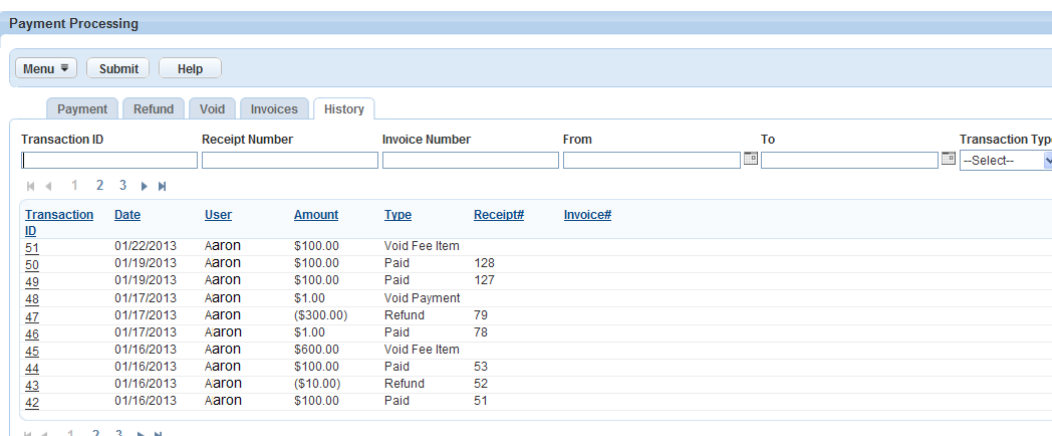


### Viewing a Transaction Receipt Summary from the Payment Processing Portlet

Depending on how your administrator has configured your system, Civic Platform can automatically generate and display a summary receipt when you complete a group of transactions through the Payment Processing portlet. However, if your administrator has configured a transaction report, you can return to the Payment Processing portlet later to view and print a receipt summary for a particular transaction.

#### To view a receipt summary for a group of transactions

1. Navigate to the Payment Processing portlet.
2. Select the History tab.  
Civic Platform displays the Payment Processing - History portlet.



3. Locate and select the desired Transaction ID.  
Civic Platform displays the list of transactions performed in this group.

Payment Processing

Menu Submit Help

Payment Refund Void Invoices History

Transaction ID Receipt Number Invoice Number From To Transaction Type

Transaction Date User Amount Type Receipt# Invoice#

Transaction ID	Date	User	Amount	Type	Receipt#	Invoice#
50	01/19/2013	Aaron	\$100.00	Paid	128	

Transaction ID: 50

Menu Print Receipt Help

Fee Total \$100.00

Record ID	Address	Parent Record ID	Invoice #	Payment Period	Fee Item	Quantity	Unit Amount	Fees	Paid	Outstanding	Receipt#	Notes
13CAP-0000020	N/A		97	FINAL	F1	1	\$100.00	\$100.00	\$100.00	\$0.00	128	

4. To print a Transaction Receipt that lists all items in this transaction group, click **Print Receipt**. Civic Platform generates and displays the Receipt Summary.

**Receipt Summary**

County of Sacramento Accounting & Fiscal Services

-----Customer Receipt-----

Session Nbr : 2  
 Trans NBR : 144  
 For Permit Nbr: 13CAP-0000020  
 Business Date : 01/22/2013 01:03:56AM  
 Today Date : 01/23/2013 12:35:45AM  
 Permit Fee Due: \$400.00  
 Admin Fee Due : \$0.00  
 Total Amt Paid: \$20.00  
 Operate ID : ADMIN  
 CashDrawID :

-----  
 Fee Items  
 F1.....\$20.00

-----  
 Total Invoice Amount: \$400.00  
 Total Payment: \$0.00  
 Balance: \$400.00

-----  
 Cash Tendered \$20.00  
 Change Due : \$0.00  
 Unapplied : \$unapplied\$

Cash Tendered: \$20.00  
 Check Tendered: (Ref#)  
 Ref:

Print Receipt Cancel

5. To print a copy of the receipt summary, click **Print Receipt**.

## Voiding a Payment

When you void a payment, Civic Platform decreases the total payment amount and then increases the balance owed, as if you never made the payment. You can void payments directly from the application or from the Payment Processing portlet. Voiding from the Payment Processing portlet allows you to void payments for both single record and multiple records.

### Topics

- [Voiding a Payment from the Application](#)
- [Voiding a Payment from the Payment Processing Portlet](#)

## Voiding a Payment from the Application

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Select each payment transaction that you want to void.

**4. Click **Void**.**

Civic Platform displays a Void Payment pop-up window.

**5. Select a void reason from the Reason drop-down list, and enter any pertinent comment describing more for the Void action, if desired.**

**6. Click **Submit**.**

Civic Platform voids the selected payments.

## Voiding a Payment from the Payment Processing Portlet

When you void a payment from the Payment Processing portlet, you can void payments for a single record or for multiple records simultaneously.

### To void a payment from the Payment Processing Portlet

**1. Find the Building record you want to work with.**

**2. Navigate to the Payment Processing portlet.**

**3. Click the Void tab.**

Civic Platform displays the Payment Processing - Void portlet.

**4. Use Search to locate the items that you want to void.**

Repeat the Search until you locate all items that you want to void.

Civic Platform displays a list of all items that match your search criteria. Notice that the Total Payments amount listed updates as you add items to the list.

Record ID	Address	Transaction Code	Method	Receipt#	Amount	Not Applied	Trust Account ID	Cashier ID	Date
<input type="checkbox"/> 13CAP-00000020			Cash	144	\$20.00	\$0.00		ADA	01/22/2013

**5. Select each item that you want to void.**

**6. Click **Void**.**

Civic Platform displays a Void Payment pop-up window.

**7. Select a void reason from the Reason drop-down list, and enter any pertinent comment describing more for the Void action, if desired.**

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

Civic Platform voids the selected payments.

**9. To view the transaction details, click the History tab and select the desired Transaction ID. Drill down to view additional details, as desired.**

The screenshot displays the 'History' tab in the Civic Platform interface. It shows a transaction table with the following data:

Transaction ID	Date	User	Amount	Type	Receipt#	Invoice#
52	01/23/2013	ADA	\$20.00	Void Payment		

Below this, the record ID '13CAP-00000020' is highlighted. The payment history for this record is shown in the following table:

Date	Action	Receipt #/Fee Item	Amount	Cashier ID	Received
01/23/2013	Void Payment Applied	F1	(\$20.00)	ADA	
01/23/2013	Void Payment	144	(\$20.00)	ADA	
01/22/2013	Payment Applied	F1	\$20.00	ACA	
01/22/2013	Payment	144	\$20.00	ACA	

## Viewing the Payment History for a Record

View the payment history associated to a record to see the date, amount, cashier ID, and receipt number. You can also view the payment method or the action of payments made for the record.

### To view a payment history

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payment History tab.  
Civic Platform displays the payment history.

## Processing Record Payments Using a Barcode Scanner

Your administrator can configure the payment processing interface to enable you to read and retrieve system-generated invoices by scanning barcodes on each invoice, or by entering the invoice number manually.



### Note:

To use the barcode scanning functionality, you must connect an Intermec SR30 Handheld scanner to your system.

The payment processing interface requires you to first select one of these fields: Record ID, State License #, or Invoice #, and then to scan the invoice with the barcode reader device.

You can select the field using the mouse or enter a hotkey.

To use the hot keys, select one of these fields as follows: type **Ctrl+Shift+<Display Order #>** and substitute the *Display Order #* by entering the associated number of 1, 2, or 3. The Record ID field is 1, State License # field is 2, and Invoice # field is 3. Refer to [Hotkey Display Order Number for Barcode Search Fields](#).

Use **Ctrl+Shift+S** to select the Global Search field. If you select the Global Search field, then you can scan any barcode value so you can locate the associated invoice and the fee items. When you use the barcode scanner, the Search button triggers automatically after the barcode reader populates the value into the selected field.

For information on how to manage payments, see [Receiving a Payment for a Record](#).



**Figure 15: Hotkey Display Order Number for Barcode Search Fields**

### To process payments with the barcode scanner

1. Navigate to the Payment Processing portlet.
2. Click the Payment tab.
3. Use the mouse or enter the hotkey to select one of these fields: Record ID, State License #, or Invoice #.

To use a hotkey, select one of these fields by typing **Ctrl+Shift+<Display Order #>** and substitute the *Display Order #* by entering the associated number of 1, 2, or 3. The Record ID field is 1, State License # field is 2, and Invoice # field is 3.



#### Note:

To use the barcode scanning functionality, you must connect an Intermec SR30 Handheld scanner to your system.

4. Click **Search**.  
Civic Platform displays fee items associated with the invoice.

Record ID	Address	Parent Record ID	Invoice #	Payment Period	Fee Item	Quantity	Unit Amount	Fees	Paid	Outstanding	Receipt #
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F1	1	N/A	\$100.00	\$20.00	\$80.00	144
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F2	1	N/A	\$100.00	\$0.00	\$100.00	
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F3	1	N/A	\$100.00	\$0.00	\$100.00	
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F4	1	N/A	\$100.00	\$0.00	\$100.00	

5. Select the Record from the search results.
6. Scan the invoice number using the barcode device.
7. Click **Pay**.  
Civic Platform Displays associated fields for Payment.

### Processing Payments for Multiple Records

Civic Platform has cashiering tools that allow for easy intake of payments across multiple records and Point of Sale items. When an owner or licensed professional is ready to pay for invoiced items, the cashier can consolidate payments for fee items from different records. For example, a contractor wants to pay the fees

for the electrical applications on three different records. This feature also allows individuals to pay for fee items using multiple tenders. Civic Platform stores the payment as a transaction payment history.

Several processes must occur before the cashier can process a payment:

A user must add the fee items to the record.

A user must invoice the fee items and send the invoice to the licensed professional or owner (see [Invoicing](#)).

When the licensed professional or owner is ready to make payment, the cashier needs to open a cashier session and then make sure the cash drawer functions properly (see [Working with a Cash Drawer Interface](#)).

Customers can pay separately for Point of Sale (POS) items, or they can pay for the items along with the record fees.

Whether a cashier receives an overpayment, an underpayment, or a full payment, the Payment Processing portlet automatically allocates the payment according to the instructions you provide (see [Allocating Payments](#)).

### Topics

- [Searching for Fee Items](#)
- [Adding Point of Sale Items to the Payment List](#)
- [Adding Records for Renewal](#)
- [Processing Payments](#)
- [Viewing the Transaction Payment History](#)

## Searching for Fee Items

You need to complete a search for the Record ID or State License # so that you can specify which fees that the customer is making payment on.

### To look up a fee item

1. Find the Building record you want to work with.  
Navigate to the Payment Processing portlet.  
Civic Platform displays the Payment Processing portlet.
2. Enter the desired Record ID or State License # and click **Search**.  
Civic Platform displays a list of the fees related to the selected Record ID or State License #.
3. To add more fee items to the payment session, click **Add Fees** and complete the search again with a different Record ID or State License #.
4. If the individual does not want to make payment on all of the items in the Fee Item list, select the items the individual does not want to pay, and click **Delete**.  
Civic Platform removes the checked fee items from the Fee Item list, and recalculates the payment total.

## Adding Point of Sale Items to the Payment List

Customers can purchased Point of Sale (POS) items either separately or in addition to the record fees. These include items sold at the agency, such as a map.

### To add a Point of Sale item to the payment list

1. Find the Building record you want to work with.



Navigate to the Payment Processing portlet and click the **Search** button.

- Enter the desired Record ID or State License # and click the **Submit** button.  
Civic Platform displays a list of the fees related to the selected Record ID or State License #.
- Complete one of these options:
  - Click **Add POS Item**.
  - Click the Payment tab, then click the **Add POS Item** button.  
Civic Platform displays the POS portlet.

Payment Processing

Menu ▾ Add Fees Add POS Item Add Renewals Pay Delete Help

Payment Refund Void Invoices History

Record ID State License # Invoice Number

Fee Total \$400.00

Record ID	Address	Parent Record ID	Invoice #	Payment Period	Fee Item	Quantity	Unit Amount	Fees	Paid	Outstanding	Receipt #
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F1	1	N/A	\$100.00	\$0.00	\$100.00	144
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F2	1	N/A	\$100.00	\$0.00	\$100.00	
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F3	1	N/A	\$100.00	\$0.00	\$100.00	
<input type="checkbox"/> 13CAP-00000020			100	FINAL	F4	1	N/A	\$100.00	\$0.00	\$100.00	

Menu ▾ Submit Add Search Cancel Help

POS Type: POS ▾

Category	Version	Fee Item	Quantity	Unit Price	Amount	Notes
--Select-- ▾	--Select-- ▾	--Select-- ▾	<input type="text"/>	\$ <input type="text"/>	\$0.00	<input type="text"/>
Total:					\$0.00	

- Select the POS Type, Category, Version, and Fee Item from the drop-down lists.
- Enter a value into the Quantity, Unit Price, and Notes fields.
- To add more than one POS item, click **Add** in the POS portlet.
- Click **Submit**.  
Civic Platform adds the POS item(s) to the Fee Item list.

## Adding Records for Renewal

When a record expires, you can renew the record and pay for the newly generated fee through the Payment Processing portlet.

### To add records for renewal

- Navigate to the Payment Processing portlet.
- Click **Add Renewals**.  
Civic Platform displays Add Records for Renewal portlet.

Payment Processing

Add Records for Renewal

Menu ▾ Select Search Delete Cancel Help

Payment Refund Void Invoices History

Record ID State License #

Record ID	License #	Address	Contact Name	Organization Name	Phone
0 record(s) found.					

- Enter the desired Record ID or State License # and click the **Search** icon.  
Civic Platform displays a list of records related to the selected Record ID or State License #.
- Select the record you want to work with and click **Select**.  
Civic Platform creates a renewal record for the selected record and adds a fee item to the renewal record.

The screenshot shows the 'Payment Processing' window with a menu bar containing 'Menu', 'Add Fees', 'Add POS Item', 'Add Renewals', 'Pay', 'Delete', and 'Help'. Below the menu are tabs for 'Payment', 'Refund', 'Void', 'Invoices', and 'History'. There are three search fields: 'Record ID', 'State License #', and 'Invoice Number', each with a magnifying glass icon. Below the search fields, it shows 'Fee Total 70.00 \$'. A table lists records with columns for 'Record ID', 'Address', 'Parent Record ID', 'Invoice #', and 'Payment Period'.

Record ID	Address	Parent Record ID	Invoice #	Payment Period
<input type="checkbox"/> 12CAP-00001727		12CAP-00000-001L4	1701180	FINAL
<input type="checkbox"/> Lydia001			1701167	FINAL
<input type="checkbox"/> Lydia001			1701166	FINAL
<input type="checkbox"/> Lydia001			1701167	FINAL
<input type="checkbox"/> Lydia001			1701166	FINAL

## Processing Payments

Individuals can pay invoiced fees for one or more records, as well as any Point of Sale items that they encounter at the agency. When using this feature, customers must pay in full. Partial payments are not possible. However, you can remove fees from the implied payment set without impacting the database fee information. This feature also allows individuals to use multiple payment methods, such as cash, trust account, check, and credit card.

After the payment is complete, the cashier can print a receipt that details the fee items, the amount paid, and the payment methods used.

### To process payments

- Search for the Record ID(s) or State License #(s) with the fees the individual wants to make payment on, and add POS items if needed.

For instructions on searching for payment items, see [Searching for Fee Items](#).

For instructions on adding POS items to a transaction, see [Adding Point of Sale Items to the Payment List](#).

- In the Payment Processing portlet, use the drop-down list to select the Payment Method.



#### Note:

Certain payment methods require the cashier to enter additional fields. For example, a Credit Card needs the card type, account number, and so forth recorded. These fields appear in a record portlet to the right of the Payment portlet. Enter the required information, and click **Save**.

- Enter the payment details for the selected payment method.

If you are entering a cash payment, see [Common Payment Details](#) and [Cash Payment Details](#) for field definitions.



#### Note:

If there is overpayment, you can adjust the amount in the Change and Unapplied Credit fields so you can define the amount of money to return to the payor and amount of money to add as credit.

If you are entering a credit card payment, see [Common Payment Details](#) and [Credit Card Payment Details](#) for field definitions.



**Note:**

Some agencies set up a magnetic card reader to automatically read the credit card information (Card Type, Account Number, Expiration Date, First Name, Last Name and Cardholder's Name) into the corresponding Civic Platform fields.

If you are entering a check payment, see [Common Payment Details](#) and [Check Payment Details](#) for field definitions.

4. Click **Save** to save the payment details for the selected payment method.
5. To add another payment, click **Add** in the Payment Processing portlet, and repeat [In the Payment Processing portlet, use the drop-down list to select the Payment Method.](#) through [Click Save to save the payment details for the selected payment method.](#)



**Note:**

The Add option lets you quickly record successive payments from different payees as well as payments from one payee who uses various payment methods.

6. To use multiple payment methods, click **Add**, then select the payment method and enter the amount paid for that method type.

Payment Method	Account Number	Amount
<input type="checkbox"/> Trust Account	--Select--	700.00
<input checked="" type="checkbox"/> Check		0.00

Fee Total:	\$700.00
Total Tendered:	\$700.00
Balance:	\$0.00
Change:	\$: 0.00
Unapplied Credit:	\$: 0.00

7. To remove a payment line, mark the check box next to the line then click **Delete**.
8. Click **Pay**.  
If there is overpayment or underpayment, Civic Platform automatically allocates the payment. See [Allocating Payments](#).

Civic Platform displays a list of Record IDs and paid fee items. Receipt Details and Receipt Summary display in a pop-up window.

Record ID	Address	Parent Record ID	Invoice #	Payment Period	Fee Item	Quantity	Unit Amount	Fees	Paid	Outstanding	Receipt
BLD12-00012	2012 Bish...		181	FINAL	Technolog...	1	N/A	\$20.00	\$20.00	\$0.00	84

https://aw.lst.accela.com/?mode=viewTransPayReceipt&transSeqNbr=256&module=Bu...

File Edit View Favorites Tools Help

RECEIPT

STATE OF MONTANA  
DLI  
301 S. PARK AVE.  
Mike Field

Application: 13CAP-0000020  
Application Type: Building/Carol Application/Parent record  
Address:

Receipt No.	144					
Payment Method	Ref Number	Amount Paid	Payment Date	Cashier ID	Received	Comments
Cash		\$20.00	01/22/2013	ADMIN		

Work Description:

**Receipt Summary**  
County of Sacramento Accounting & Fiscal Services

-----Customer Receipt-----

Session Nbr : 2  
Trans NBR : 144  
For Permit Nbr: 13CAP-0000020  
Business Date : 01/22/2013 01:03:56AM  
Today Date : 01/23/2013 12:35:45AM  
Permit Fee Due : \$400.00  
Admin Fee Due : \$0.00  
Total Amt Paid: \$20.00  
Operate ID : ADMIN  
CashDraweID :

-----  
Fee Items  
F1.....\$20.00

-----  
Total Invoice Amount: \$400.00  
Total Payment: \$0.00  
Balance: \$400.00

-----  
Cash Tendered \$20.00  
Change Due : \$0.00  
Unapplied : \$unapplied\$

Cash Tendered: \$20.00  
Check Tendered: (Ref#)  
Ref:

Print Receipt Cancel

## Viewing the Transaction Payment History

You can view the transaction payment history. When viewing a payment history you can see the transaction ID, date, cashier ID, and total amount. The cashier can also print a receipt for the transaction. If you have any questions regarding a payment contact your agency administrator.

### To view the transaction payment history

1. Navigate to the Payment Processing portlet.  
Civic Platform displays the Payment Processing portlet.
2. Click the History tab.  
Civic Platform displays the Transaction History tab.  
To search for a transaction ID, enter the Transaction ID or the date of the transaction and click **Submit**.  
To view all transactions within a certain time period, enter the date range for the transactions and click **Submit**.  
To view the details of a transaction, click the Transaction ID number.  
Civic Platform displays the Transaction ID details.
3. To print a receipt for the transaction, navigate to the transaction details, then click **Print Receipt**.  
Civic Platform displays the Receipt Detail and Receipt Summary in a pop-up window.

## Allocating Payments

In case of overpayments or underpayments for the selected fee items, the Record portlet or the Payment Processing portlet give you different solutions to allocate the payment. The Payment Processing portlet always automatically allocates a payment, while the Record portlet allows you to either allocate a payment manually or automatically.



### Note:

The mechanisms for automatically allocating underpayments are different in the Record portlet and Payment Processing portlet. Please read more of the topics in this section.

## Topics

- [Automatic Allocation of Payments in the Record Portlet](#)
- [Automatic Allocation of Payments in the Payment Processing Portlet](#)
- [Manually Allocating a Payment in the Record Portlet](#)

## Automatic Allocation of Payments in the Record Portlet

Depending on the configuration by your agency administrator, automatic allocation of payments might or might not work in the Record portlet.

If you pay more than the total amount, then after you click **Save**, the payment is complete, and the overpayment directly adds to the **Amount Not Applied** of the record.

If you pay less than the total amount, then after you click **Save** on the payment screen in the Record portlet, the fee allocation screen displays. You can then click **Full Pay** to determine the status of automatic allocation for your agency.

Invoice #	Fee	Paid	Outstanding	Amount	Priority	Payment Period
DEMO-00000247	\$39.00	\$0.00	\$39.00	0.00	STANDARD	
DEMO-00000247	\$3.40	\$0.00	\$3.40	0.00	STANDARD	
DEMO-00000247	\$25.00	\$0.00	\$25.00	0.00	STANDARD	

**Figure 16: Fee Allocation Screen**

When you click **Full Pay**:

- If automatic allocation is not functional, the **Amount** field at each fee item populates with the value in the **Outstanding** field. The total amount of the listed fee items can be greater than the **Amount Not Applied**. You must adjust the amount to make sure the total amount is equal to or is less than the Amount Not Applied. Otherwise, the payment might fail.
- If the automatic allocation is functional, Civic Platform allocates the **Amount Not Applied** in the fee allocation screen to the **Amount** fields of the listed fee items. Below is the automatic allocation rule that applies:
  1. Civic Platform pays negative fee items in full with the topmost priority;
  2. Civic Platform allocates the balance of the payable amount (which is the sum of the Amount Not Applied and the absolute values of the negative fees) to fee items by priority first.

Allocation might or might not happen depending on whether your administrator has configured the fee items with priorities.

3. If Civic Platform allocates the final amount among fee items with the same priority, it allocates to the fee items according to the orders of the fee items in the list.
4. If Civic Platform allocates the final amount among fee items without priority setting, it allocates to all the fee items. Each fee item takes a proportion of the final amount equal to the proportion of the outstanding amount in the total outstanding amount.
  - If the proportion for a fee item is a decimal value (for example, 20.3), Civic Platform rounds up to the next integer (from 20.3 to 21) provided the fee item is not the last one. The last fee item gets the remainder of the final amount.

### Automatic Allocation of Payments in the Payment Processing Portlet

Civic Platform only supports automatic payment allocation function in the Payment Processing portlet in case of overpayments or underpayments. After you click **Pay**, the payment is complete with the paid amount automatically allocated.

If a payment in the Payment Processing portlet involves multiple payment methods, Civic Platform allocates the paid amount from non-Cash payment methods first, following the order of the payment methods on the payment screen. Civic Platform allocates the paid amount using the Cash payment method last.

If you pay more than the total amount, the over-paid amount populates in the **Change** field first of the payment screen. You can set part or all of the over-paid amount as Unapplied Credit. The Unapplied Credit directly adds to the Amount Not Applied of the record. Civic Platform pays the highest record ID.

If you pay less than the total amount, Civic Platform allocates the Total Tendered in the payment screen to the **Amount** fields of the record fee items and POS items that you are paying. Below is the automatic allocation rule that applies:

1. Civic Platform allocates POS items as the first priority, from the lowest to the highest POS item IDs; in one POS item, from the lowest to the highest transaction IDs.
2. Civic Platform allocates records after it allocates all POS items, from the lowest to the highest record IDs.
3. If the final amount cannot be paid in full for a record:
  - a. Civic Platform pays negative fee items in the record in full with the topmost priority;
  - b. Civic Platform allocates the remaining payable amount (the sum of the Amount Not Applied and the absolute values of the negative fees) to fee items by priority first.
 

This allocation might or might not happen depending on whether your administrator has configured the fee items with priorities.
  - c. If Civic Platform must allocate the final amount among fee items with the same priority, it does so according to the outstanding amount of the fee items in the list, from the least outstanding amount to the highest outstanding amount.
  - d. If Civic Platform must allocate the final amount among fee items without priority setting, it does so according to the outstanding amount of the fee items in the list, from the least outstanding amount to the highest outstanding amount.

## Manually Allocating a Payment in the Record Portlet

When you allocate a payment, you apply all or part of the payment toward individual assessed fee items for an application. You can allocate a payment at the time you receive the payment, or at a later time as needed.

### To allocate a payment at the time of receipt

1. Receive a payment. For details, see [Receiving a Payment for a Record](#).
2. Locate any fees with an outstanding balance (Fees with an outstanding balance show a balance greater than zero on the **O/S** column).
3. To allocate a payment that covers the full balance of an outstanding fee, mark the check box next to the fee and click **Full Pay**.  
To allocate a payment that covers only part of the balance of an outstanding fee, enter the partial payment amount in the **Amount** field next to the fee.
4. To calculate the total allocation, press TAB.

**Note:**

Do not press the ENTER key to recalculate the total amount. Doing so completes the transaction

---

5. Click **Submit**.

Civic Platform displays the main Payment Summary.

### To allocate a payment separate from the time of receipt

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Select the transaction with an unallocated balance.  
Follow steps 2-5 of the instructions to allocate a payment at time of receipt.

## Handling Refunds

---

There are two methods for refunding payments:

- **Refunding directly from the application.** This method allows you to initiate either a full or partial refund of unallocated payments.
- **Refunding through the Payment Processing portlet.** This method allows you to initiate a full refund of all payments for one or more applications simultaneously.

### Topics

- [Refunding a Payment from an Application](#)
- [Refunding a Payment from the Payment Processing Portlet](#)
- [Refunding a Payment from the Point of Sale Portlet](#)
- [Voiding a Refund](#)

### Refunding a Payment from an Application

You can initiate either a full or a partial refund of unallocated payments when you process a refund from an application (See [Allocating Payments](#)). If you need to refund more than the amount currently unallocated, you can withdraw payments from individual fee items.

#### To refund a payment from an application

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Click **Refund**.  
Civic Platform displays a list of any assessed fees and the total amount of any unallocated payments.
4. Do one of the following:
  - To withdraw the full payment, mark the check box next to the fee and click **Full Refund**.
  - To withdraw part of a payment, enter the partial payment amount in the **Amount** field next to the fee.  
Civic Platform increases the total refund amount.
5. To recalculate the total refund, press the TAB key.



#### Note:

Do not press ENTER to recalculate! Doing so completes the transaction rather than recalculate it

---

6. Click **Submit**.
7. Complete the fields with available information (see [Refund Details](#) for field descriptions).
8. Click **Submit**.  
Civic Platform generates a receipt.



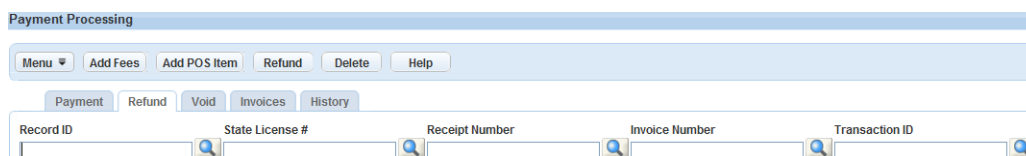
- To view or print the receipt, click the link to the receipt number. You can use your browser's print functionality to print the receipt.

## Refunding a Payment from the Payment Processing Portlet

Use the Refund tab on the Payment Processing portlet to refund multiple fee payments for one or more applications simultaneously.

### To refund a payment through the Payment Processing Portlet

- Find the Building record you want to work with.
- Navigate to the Payment Processing portlet.
- Click the Refund tab.  
Civic Platform displays the Payment Processing - Refund portlet.



- Use Search to locate the items you want to refund. Repeat the search until all items display that you want to refund.  
Civic Platform displays a list of items that match your search criteria. Notice that the Available Refund Amount updates automatically as you add items to the list.

- Select each item that you want to refund.
- Complete the fields in the Refund Payments detail with available data (see [Refund Details](#) for field descriptions).
- Click **Submit**.

- Click **Refund**.  
Civic Platform processes the refund for the selected payments.

- To view the transaction details, click the History tab and select the desired Transaction ID. Drill down to view additional details, or print a receipt, as desired.

Transaction ID	Receipt Number	Invoice Number	From	To	Transaction Type
15	08/02/2012	ADMIN	(\$720.00)	Refund	13
13	08/02/2012	ADMIN	(\$720.00)	Refund	11
50	01/19/2013	ADMIN	\$100.00	Refund	128
49	01/19/2013	ADMIN	\$100.00	Refund	127
47	01/17/2013	ADMIN	(\$300.00)	Refund	79

Record ID	Address	Invoice #	Payment Period	Fee Item	Quantity	Unit Amount	Fees	Paid	Outstanding	Receipt #	Notes
09BLD-00000-00038	N/A	48	FINAL	E1	1	\$100.00	\$100.00	\$0.00	\$100.00	79	
09BLD-00000-00038	N/A	49	FINAL	E2	1	\$100.00	\$100.00	\$0.00	\$100.00	79	

## Refunding a Payment from the Point of Sale Portlet

Use the Refund button from the Point of Sale portlet to initiate full or part refund of unallocated payment. You cannot refund more than the payment amount currently unallocated.

### To refund a payment from the Point of Sale portlet

1. Navigate to Point of Sale portlet and locate the transaction you want by clicking the transaction ID link in the transaction ID column.  
Civic Platform displays the transaction details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Click **Refund**.  
Civic Platform displays a list of fee items and the total amount of any unallocated payments.
4. Do one of the following:
  - To withdraw the full payment, mark the check box next to the invoice and click **Full Refund**.
  - To withdraw part of a payment, enter the partial payment amount in the **Amount** field next to the invoice.  
Civic Platform increases the total refund amount.
5. To recalculate the total refund, press the **TAB** key.



#### Note:

Do not press ENTER to recalculate! Doing so completes the transaction rather than recalculate it.

---

6. Click **Submit**.
7. Complete the fields with available information (see [Refund Details](#) for field descriptions).
8. Click **Submit**.  
Civic Platform generates a receipt.
9. To view or print the receipt, click the link to the receipt number. You can use your browser's print functionality to print the receipt.

## Voiding a Refund

You can void a refund in Civic Platform, provided that Civic Platform has not yet disbursed the refund.

### To void a refund

1. Open the Building record you want to work with and locate the application you want by clicking the record ID link in the Record ID column.  
Civic Platform displays the application details.
2. Click the Payments tab.  
Civic Platform displays the main payment summary.
3. Select each refund transaction that you want to void.
4. Click **Void**.  
Civic Platform updates the transaction status to "Voided."

## Managing Trust Accounts

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The Trust Account feature in Civic Platform allows you to establish and maintain trust account information, perform trust account transactions, and print trust account reports.

You can set up trust accounts for licensed professionals and citizens. Trust accounts are helpful for customers such as contractors or developers who have a large amount of work that they regularly perform in your jurisdiction. The customer deposits money from which he can draw when paying fees for a record. He no longer needs to go to your agency to make a payment in person for each fee.

### Topics

- [Creating a Trust Account](#)
- [Closing a Trust Account](#)
- [Viewing Associated Records](#)
- [Assigning Public User Permission](#)
- [Performing Trust Account Transactions](#)
- [Viewing and Printing Trust Account Reports](#)

### Creating a Trust Account

You can create a trust account for addresses, parcels, licensed professionals, and other contacts in your Civic Platform system.

After you create a trust account, you can link records to the account. Your administrator can set up automatic billing for related fees, which not only saves the individual from the need to go to your agency to pay each individual fee, but it also helps your agency staff by minimizing lines.

#### To create a trust account

1. Go to the Trust Account portlet and click **New**.  
Civic Platform displays the Account Detail tab on the Trust Account form.
2. Complete the form with available information. See [Trust Account Form Fields](#) for field descriptions.
3. Click **Submit**.  
Civic Platform creates the trust account and then displays the account information.
4. To associate the trust account with an address, parcel, or person, select the appropriate tab: Associated Address (address) or Associated Parcel (parcel or person).
5. If you are on the Associated Address tab, click **Associate Address**.  
If you are on the Associated Parcel tab, click **Associate Parcel**, **Associate Licensed Professional** or **Associate Contact**, depending on what you want to associate.
6. Use search to locate the item(s) you want to associate to the trust account, then click **Submit**.  
Civic Platform displays the results of your search.
7. Select the item(s) that you want to associate to the trust account.
8. Click **Select**.  
Civic Platform adds the record to the trust account.

## Closing a Trust Account

You can close a trust account at any time and if needed, you can reopen a closed trust account. There are several reasons why you might want to close a trust account. For example, the trust account owner wants to close the account, the account is dormant, or someone made a mistake when opening a trust account. You cannot delete a trust account, you can only close it, preserving the record for archival purposes.

### To close a trust account

1. Navigate to the **Trust Account** portlet.
2. Select the trust account that you want to close.
3. Select **Close** from the toolbar drop-down menu button.

Civic Platform closes the trust account.

## Viewing Associated Records

When you check out or pay for some records with a trust account, Civic Platform associates the records with the trust account. You can view the associated records from the trust account portlet.

### To view associated records

1. Find the Trust Account record you want to work with.
2. Click the Associated Record tab.

Civic Platform displays the associated records.

## Assigning Public User Permission

You grant public users permission to their trust accounts provided that they enter the correct password. For safety purpose, you can also deny public user access to some trust accounts if any abnormality occurs.

### To assign public user permission

1. Locate and select the Trust Account record you want to work with.  
Civic Platform displays the Trust Account details.
2. Click **Look Up**.  
Civic Platform displays the public user search portlet.
3. Enter search criteria as appropriate. For a description of public user search fields, see [Using the Search Features](#).
4. Click **Submit**.
5. Select a public user and click **Approve**.  
Civic Platform allows the public user to access the trust account.

<input type="checkbox"/>	User ID	E-mail	Cell Phone	Password request question
<input checked="" type="checkbox"/>	Josolin.Smith	Josolin.Smith @ accel.com	012-358-528	Name of Pet

6. Select a public user and then click **Reject** to prohibit the public user to access the trust account.

## Performing Trust Account Transactions

After you set up a trust account, you can use the account to perform transactions such as depositing, withdrawing, making payments, and transferring money. You can also make adjustments to a trust account when you need to do so.

### Topics

- [Depositing Money into a Trust Account](#)
- [Transferring Money between Trust Accounts](#)
- [Withdrawing Money from a Trust Account](#)
- [Making Payments Using Automated Trust Accounts](#)
- [Making an Adjustment to a Trust Account](#)

## Depositing Money into a Trust Account

Deposits typically occur when a trust account first opens, and when a trust account nears depletion. You can deposit money into an active trust account at any time.

### To deposit money into a trust account

1. Find the Trust Account record you want to work with.
2. Click the account ID link for the account you want in the Account ID column.  
Civic Platform displays the Trust Account details.
3. Select **Deposit** from the toolbar drop-down menu button.
4. Enter the amount of money you want to deposit in the **Amount** field.
5. Click **Submit**.  
Civic Platform deposits the money into the selected trust account and then displays the Account Detail tab.

## Transferring Money between Trust Accounts

If an individual has multiple trust accounts, you can transfer money between his accounts. You can only transfer funds between accounts associated with the same individual.

### To transfer money between trust accounts

1. Find the Trust Account record you want to work with.
2. Click the account ID link for the account you want in the Account ID column.  
Civic Platform displays the Trust Account details.
3. Select **Transfer** from the toolbar drop-down menu button.
4. Enter the amount of money you want to transfer in the **Amount** field.
5. Select the destination trust account from the **Target Account ID** drop-down list.
6. Click **Submit**.  
Civic Platform transfers the money into the selected trust account and then displays the Account Detail tab.

## Withdrawing Money from a Trust Account

There might be times when an individual needs to withdraw money from his/her trust account. For example, if an individual is not going to make any transactions for a while, he might want to remove the excess money from his trust account. Civic Platform allows you to do this for your customers.

### To withdraw money from a trust account

1. Find the Trust Account record you want to work with.
2. Click the account ID link for the account you want in the Account ID column.  
Civic Platform displays the Trust Account details.
3. Select **Withdraw** from the toolbar drop-down menu button.
4. Enter the amount of money you want to withdraw in the **Amount** field.
5. Click **Submit**.  
Civic Platform withdraws the money from the selected trust account and then displays the Account Detail tab.

## Making Payments Using Automated Trust Accounts

An administrator can configure Civic Platform so that it automatically creates an invoice and applies payment for fee items from the associated trust account. If there is an address, parcel, primary contact or Licensed Professional associated with the record, and if Civic Platform associates that item with a trust account, all fees originate from that trust account. If the trust account contains less than the amount owed, Civic Platform takes the maximum possible payment from the trust account, then it creates an invoice for the remaining amount. You can also create an invoice for the fee without applying a payment.

If a fee item does not have an associated trust account, Civic Platform creates a new trust account to disburse the fee item by using overdraft limit functionality.

Example: Your administrator configures Civic Platform to take payments automatically from a trust account whenever possible. You want to create an invoice for fees on a certain record. When you navigate to the Fees tab in the record portlet, you click Invoice & Pay and choose between Trust Account and Other Payment Method. Civic Platform identifies associated contacts from whom to take payment. If Civic Platform does not find a contact match, it prompts you to choose an alternate payment method, or it displays the payment form where the user can complete the transaction without using the trust account. When the transaction completes, you can view the final payment results and any generated receipts.

### To make payment with automated Trust Accounts

1. Open the Building record you want to work with.  
Civic Platform displays the application details.
2. Click the **Fee** tab.
3. Select each fee item with a status of New.

Invoice #	Fee Code	Fee Item	Qty	Unit	Fees	Status	Subgroup
<input type="checkbox"/> 367964	B_RP	Refund Processing - 200	2	Each	\$100.00	CREDITED	
<input type="checkbox"/> 367968	B_RP	Refund Processing - 200	1	Each	\$50.00	CREDITED	
<input type="checkbox"/> 367968	B_WSR	Water Supply Report - 233	1	Each	\$420.00	CREDITED	
<input type="checkbox"/> 367968	B_WSR	Water Supply Report - 233	2	Each	\$840.00	CREDITED	
<input type="checkbox"/> 367968	B_WSR	Water Supply Report - 233	2	Each	\$840.00	CREDITED	
<input checked="" type="checkbox"/> 367968	B_WSR	Water Supply Report - 233	3	Each	\$1,260.00	NEW	

#### 4. Click **Invoice & Pay**.

If the trust account includes multiple contacts, licensed professionals, addresses or parcels, Civic Platform displays the trust account selection window.

Go To ▾ Fee (6) Flags (4) GIS (1) Hearings (0) Organization Parcel (1) Parcel Ov

Multiple Contacts, Licensed Professionals, Addresses, or Parcels exists. Please select one Contacts, Licensed Professionals, Addresses, or Parcels that belongs to the account for which should be used for payment.

Title	Middle Name	Last Name	Type	Address	First Name	Parcel
<input type="radio"/> Contractor	Charlie	Brown	Parcel			125-293-4...
<input type="radio"/> Owner	Joe	Wong	Address	3652 - 0 ...		

5. Select a trust account to pay for the fee items.

6. Do one of the following:

- To invoice and pay, click **Submit**.
- To invoice but not pay, click **Invoice without Pay**.

### Making an Adjustment to a Trust Account

1. Find the Trust Account record you want to work with.

2. Click the account ID link for the account you want in the Account ID column.  
Civic Platform displays the Trust Account details.

3. Select **Adjust** from the toolbar drop-down menu button.

4. Make changes as needed.

Amount	Enter the amount you want to adjust.
Transaction Type	Select <b>Credit Adjust</b> to add money into the trust account for the entered amount. Select <b>Debit Adjust</b> to remove money from the trust account for the entered amount.

5. Click **Submit**.

Civic Platform adjusts the money for the selected trust account and then displays the Account Detail tab.

### Viewing and Printing Trust Account Reports

Civic Platform provides multiple types of reports to help your agency keep track of trust accounts.

#### Topics

- [Viewing the Transaction History of a Trust Account](#)
- [Printing Trust Account Reports](#)

### Viewing the Transaction History of a Trust Account

You can view the entire transaction history of a trust account, which can be helpful if a customer disputes transactions, you discover an accounting error, or you need to produce records for an audit.

#### To view the transaction history of a trust account

1. Find the Trust Account record you want to work with.
2. Click the account ID link for the account you want in the Account ID column.

Civic Platform displays the Trust Account details.

**3. Select the **Transactions** tab.**

Civic Platform displays the history for the selected trust account.

## **Printing Trust Account Reports**

If your agency allows individuals to overdraw their trust accounts, the Negative Balance report shows you all of the trust accounts that currently have a negative balance.

The Transaction report allows you to print one or more transaction records as needed. This is helpful if an individual either needs a receipt of the transaction, or has questions regarding past transactions.

### **To view trust account reports**

- 1.** Find the Trust Account record you want to work with.
- 2.** Click the account ID link for the account you want in the Account ID column.  
Civic Platform displays the Trust Account details.
- 3.** To access the Negative Balance report, select **Negative Balance Trust Account Report** from the primary portlet toolbar drop-down menu button.
- 4.** To access transactions reports:
  - a.** Select the **Transactions** tab.
  - b.** Select the transactions you want to include.
  - c.** Click **Print Report**.
- 5.** Click the **Print** button in your browser toolbar or select **Print** from the browser menu.  
Civic Platform prints the selected reports.



## Working with a Cash Drawer Interface

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If your agency has implemented a cash drawer in Civic Platform, you can use it to run cashier sessions, open the cash drawer, print receipts, and print endorsements on the back of checks.

You can track the value of transactions recorded during a cashier session by entering the total in the Deposit Slip # field before ending the session. For example, the cashier session can record all transactions completed by a cashier during one business day. Supervisors can use the date picker icon to select a date or manually edit the Deposit Date field, and after submittal, they can modify both the Deposit Slip # and Deposit Date fields. This functionality is controlled by your agency administrator.

### Topics

- [Searching for a Cashier Session](#)
- [Beginning a Cashier Session](#)
- [Continuing a Suspended Cashier Session](#)
- [Ending and Printing a Cashier Session](#)
- [Opening the Cash Drawer](#)

### Searching for a Cashier Session

Use the search functionality to look for a payment, confirm a voided payment, verify an amount recorded, or compare the number of transactions managed from one day to another.

#### To search for a cashier session

1. Navigate to the Cashier Session portlet and click **Search**  
Civic Platform displays the Cashier Session search form.
2. Enter search criteria as needed (see [Cashier Session Form Fields](#) for field descriptions), then click **Submit**.  
Civic Platform displays the cashier sessions that match your search criteria.
3. Click the session number link for the session you want to work with.  
Civic Platform displays the cashier summary for the session that you selected.

### Beginning a Cashier Session

Before you can accept payments or handle transactions, you must begin a new cashier session. Use cashier sessions to balance accounts and to record what transactions occur in your agency. For each session, Civic Platform records the date, the beginning and ending times of a session, the user name of the cashier, and all the transactions managed by the cashier during the session.

#### To begin a cashier session

1. Navigate to the Cashier Session portlet and click **New Session**  
Civic Platform displays a notice informing you that the session is open and it assigns a session number. You can now manage any transactions that you have permission to manage. When you end your shift, remember to end your cashier session.

Session Number	Begin Time	Status	Deposit Slip #	Deposit Date
34	01/23/201...	Opened		

## Continuing a Suspended Cashier Session

If your cashier session remains inactive for a period of time, Civic Platform might suspend your session. For example, your cashier session might expire while you take your lunch break. Before you can continue with any additional transactions, you must reactivate the cashier session.

**To continue a suspended cashier session.**

1. Navigate to the Cashier Session portlet.  
Civic Platform displays a list of cashier sessions.
2. Click **Continue Session**.  
The session is re-opened. When you end your shift, remember to end your cashier session.

## Ending and Printing a Cashier Session

At the end of your shift, you must end your cashier session.

**To end a cashier session**

1. Navigate to the Cashier Session portlet.  
Civic Platform displays a list of cashier sessions.
2. Click **End Session**.
3. Civic Platform ends the session and displays the cashier summary for the session.



**Note:**

Before you end the cashier session, you can enter the Deposit Slip # and select a deposit date for the monies collected during the session.

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Civic Platform displays a pop-up window to ask if you want to end the session.

4. Click **OK**.  
Civic Platform ends the session and displays the Cashier Summary for the session.

Cashier Summary							
Cashier Session: 22							
User Name: Alexanddra.Accela							
Begin Time: 12/11/2011 08:22:49 PM							
End Time: 01/23/2013 06:15:27 PM							
Deposit Slip #:							
Deposit Date:							
Payment Summary							
Application	Set ID	Account ID	Payment Time	Method	Action	Amount	
BLD11-00011			01/29/2012 09:43:29 PM	Check	Payment	\$225.50	
BLD11-00011			01/29/2012 09:43:29 PM		Payment Applied	\$225.50	
BLD11-00015			12/11/2011 08:22:58 PM		Payment Applied	\$20.00	
BLD11-00015			12/11/2011 08:22:58 PM	Check	Payment	\$7,886.38	
BLD11-00015			12/11/2011 08:22:58 PM		Payment Applied	\$4,767.50	
BLD11-00015			12/11/2011 08:22:58 PM		Payment Applied	\$3,098.88	
BLD11-00015			01/25/2012 11:36:07 AM		Payment Applied	\$40.00	
BLD11-00015			01/25/2012 11:36:07 AM	Cash	Payment	\$40.00	
BLD11-00016			12/12/2011 12:17:13 PM		Payment Applied	\$20.00	
BLD11-00016			12/12/2011 12:17:13 PM	Cash	Payment	\$20.00	
Total Check Transactions:						6	\$17,386.18
Total Cash Transactions:						30	\$1,642.00
Total Debit Card Transactions:						1	\$885.00
Total:							\$19,913.18

Print Cancel

5. Click **Print** to print the page.

## Opening the Cash Drawer

Sometimes it is necessary to open the cash drawer when you are not processing a payment. For example, you can open the cash drawer to make change for a \$20 bill.

### To open the cash drawer

1. Navigate to the Cashier Session portlet.  
Civic Platform displays a list of cashier sessions.
2. Click **Open Drawer**.  
Civic Platform opens the cash drawer.

## Working with a Point of Sale Transaction

Your agency might have a fee that it does not with a record. For example, you might want to sell a map of the county, copies of records, or souvenir shirts. You can create a point of sale transaction to receive these types of payments.

### Topics

- [Creating a Point of Sale Transaction](#)
- [Receiving Payments for a Point of Sale Transaction](#)
- [Viewing Point of Sale Transaction Detail](#)

### Creating a Point of Sale Transaction

#### To create a point of sale transaction

1. Navigate to the **Point of Sale** portlet.  
Civic Platform displays a list of point of sale transactions.
2. Click **New**.  
Civic Platform displays the Fee Items portlet.

Category	Version	Fee Item	Quantity	Unit Price	Amount	Notes
--Select--	--Select--	--Select--		\$	\$0.00	
Total:					\$0.00	

3. Complete the fields and enter the quantity of the fee item.
4. Optionally do all of the following to add fee items:
  - a. Click **Add**.  
Civic Platform adds another blank fee item.
  - b. Complete the fields and enter the quantity of the fee item.
5. Click **Submit**.  
Civic Platform invoices the POS transaction and displays the Payment portlet.

### Receiving Payments for a Point of Sale Transaction

After you invoice a Point of Sale transaction, you can pay for the transaction. Before you can process a payment, however, you must start a cashier session. For information about managing cashier sessions, see [Working with a Cash Drawer Interface](#).

#### To receive a payment for a point of sale transaction

1. Navigate to the Point of Sale portlet.  
Civic Platform displays a list of point of sale transactions.
2. In the **Transaction ID** column, click the link to the point of sale transaction you want.  
Civic Platform displays the transaction details.
3. Click the Fee Items tab.

Civic Platform displays the Fee Item payment list.

4. Select the POS transaction you want to pay.

5. Click **Pay**.

Civic Platform displays the payment details.

6. Complete the form with available data (see [Cash Payment Details](#) for field descriptions).

7. If you are processing additional payments, click **Pay More** and repeat step 5.



**Note:**

The Pay More option lets you quickly record successive payments from different payees as well as payments from one payee who uses various payment methods.

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8. After you receive all payments, click **Submit**.

Civic Platform displays a list of Point of Sale transactions.

9. Do one of the following:

- To allocate a payment, see [Allocating Payments](#).
- If you do not want to allocate a payment at this time, click **Cancel**.

10. Do one of the following:

- If prompted to generate a receipt of payment, mark the check box next to the payment you want and click **Submit**.
- If you do not want to generate a receipt of payment, click **Cancel**.  
Civic Platform returns to the main payment summary.

## Viewing Point of Sale Transaction Detail

You might need to view the status, the payment method, or the name of the cashier who completed a POS transaction.

### To view a point of sale transaction

1. Navigate to the Point of Sale portlet.

Civic Platform displays a list of point of sale transactions.

2. In the **Transaction ID** column, click the link to the point of sale transaction you want.

Civic Platform displays the transaction details.

3. Click the Transaction Detail tab.

Civic Platform displays the transaction details.

## Accepting and Allocating Set Payments

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The Set portlet function enables users to organize multiple applications into a set. A set is a grouping of applications that you can batch process, saving time you might otherwise spend recording payments for each fee item on individual application. For example, you can use a set to simultaneously update the workflow for several applications.

After you establish the set name, you can add one or more applications to the set or create new applications within the set. You can also allocate and apply payments to a set. You can accept full or partial payment towards the total outstanding balance for all applications within the set. After entering the payment amount, you determine what portion of the total payment you want to allocate to each fee item within the set.

Civic Platform summarizes the set, including the following information:

- Total number of applications in the set
- Number of paid fee items
- Total job value of all applications in the set
- Total assessed and invoiced fees for the set
- Any payments on the set
- Outstanding balance for all applications in the set

### To accept and allocate set payments

1. Navigate to the Sets portlet.

Civic Platform displays a list of sets in the Set portlet.

2. In the ID column, click the link of set you want to work with. To quickly locate a set, use Search to search on the set code or the set name.
3. Click the Payment tab.
4. Click **Pay**.



**Note:**

To allow Civic Platform to process a negative fee item on an application in a set, the administrator needs to set up this Standard Choice, ALLOW\_NEGATIVE\_FEE\_TRANSFER\_AS\_CREDIT,.

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5. Complete the form fields with available data (see [Payment Details for a Set](#) for field definitions).



**Note:**

If the payment method is by Credit Card, you can use a magnetic card reader to automatically read the credit card information into the corresponding fields, including CC Auth Code, CC Exp Date, and CC Holder Name.

---

6. Click **Submit**.

Civic Platform displays a Set Payment Allocation pop-up window.

7. Do one of the following:

- If you are receiving a payment for the entire balance, click **Full Pay**.
- If you are receiving a partial payment, determine what portion of the payment you want to allocate to each fee item and enter that amount in the **Amount** field for each fee item.

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

Civic Platform generates a receipt that summarizes the payment. The set payment has a unique set receipt number; the payment for each individual application has its own receipt number as well. You can print this receipt or save it to a file, as necessary.

If your agency uses a cash drawer and a receipt printer, Civic Platform prints a receipt and displays the itemized receipt in a pop-up window.

**9. If Civic Platform displays the receipt in a new window, you can use your browser print functionality to print it. Close the window when you finish.****10. If the payment method = check and your agency uses a receipt printer, put the check in the printer to print the endorsement on the check.**

If the payment method = Cash and the payment amount is more than the amount due, Civic Platform calculates the amount of change due.

## Troubleshooting Payments and Voids

---

The standard Civic Platform payment process follows a specific order:

- Assess a fee
- Invoice or charge the customer for the fee
- Receive payments
- Apply payments to the appropriate invoices/accounts.

If you run into problems during this process, this section provides you with information to troubleshoot and correct some of the common issues that can occur.

### Topics

- [Assessed Fee, but no Invoice](#)
- [Assessed & Invoiced Fee, but no Payment](#)
- [Assessed & Invoiced Fee, Payment Received, but not Applied](#)
- [Assessed & Invoiced Fee, Payment Received & Applied](#)
- [Best Practices for Voiding and Crediting Fees](#)

### Assessed Fee, but no Invoice

When you assess a fee, Civic Platform schedules the fee so that it charges the application. If a problem occurs *before* you invoice (charge) a fee to the client, then you can delete the assessment and start again by adding the new fees and continuing on the payment process path. For information on how to delete an assessed fee, see [Assessing Fees](#).

### Assessed & Invoiced Fee, but no Payment

When you assess and invoice a fee, it means that you have charged the customer for the fee and you require payment. If the client has not made a payment for this invoice and you discover a problem, you can void the problem invoice and create a new one. You can also void the assessed fee, replace it with the one you want, and generate a new invoice. For instructions on how to do this, see [Voiding an Invoiced Fee](#).

Another approach is to apply a negative fee item. Your agency administrator must enable this feature. Accela Civic Platform denotes a negative fee item with parentheses around the dollar amount. You often use this feature when you transfer a payment from one record to another. For more information on negative fees, see [Transferring Funds from One Record to Another](#).

### Assessed & Invoiced Fee, Payment Received, but not Applied

A customer has the ability to make a payment to the agency at any time. After you receive a payment, Civic Platform applies it to one or more applicable invoices and/or applications. If you have assessed and invoiced a fee, but you are still waiting for a payment, you have a couple of options

- You can apply the payment to the invoice, or
- You can void the payment, invoice, and/or assessment if there is an error.



For instructions on how to apply a payment to an invoice, see [Allocating Payments](#). For instructions on how to void a payment, see [Voiding a Payment](#). For instructions on how to voice an invoice and assessment, see [Voiding an Invoiced Fee](#).

## Assessed & Invoiced Fee, Payment Received & Applied

If you encounter a problem after a fee has gone through the payment process, Civic Platform provides an option to return to a step where the invoice still requires payment. If you do not want to do this, you can void everything and start all over, re-processing the fee item correctly from the beginning. Note that this entails voiding the payment, the invoice and/or the assessment.

If a customer pays an invoice but does not pay with cash, then you can refund the payment, resulting in an outstanding invoice showing that money is due. For instructions on how to refund a payment, see [Refunding a Payment from an Application](#).

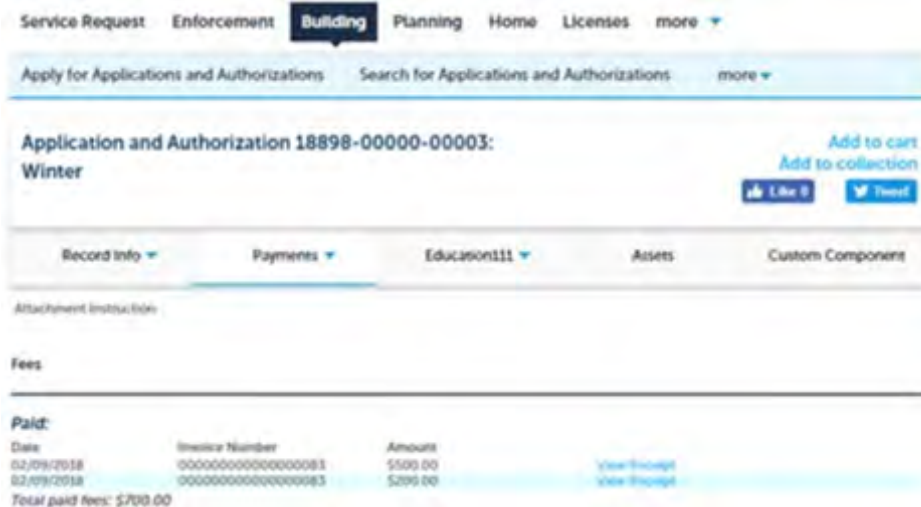
If you decide you want to take a few steps back, you must void the invoice, and then you can void and replace the assessment and put it on a new invoice. Civic Platform credits back the original payment to the customer. Civic Platform does not apply or attach the payment to anything, which allows you to take this payment and apply it to another invoice.

If a fee has been	You can
Assessed but not invoiced	Void the fee Invoice the fee Add new fees Accept payment for the fee Apply fee payments
Assessed and invoiced but not paid	Void the invoice Add correct fees Invoice fees Accept payment for the fee Apply fee payments
Assessed, invoiced, paid, but not applied	Void incorrect fees Add fees Invoice fees Accept payment for the fee Apply fee payments
Assessed, invoiced, paid, and applied	Void incorrect fees Add fees Accept payment for the fee Apply fee payments Void payments Refund payments

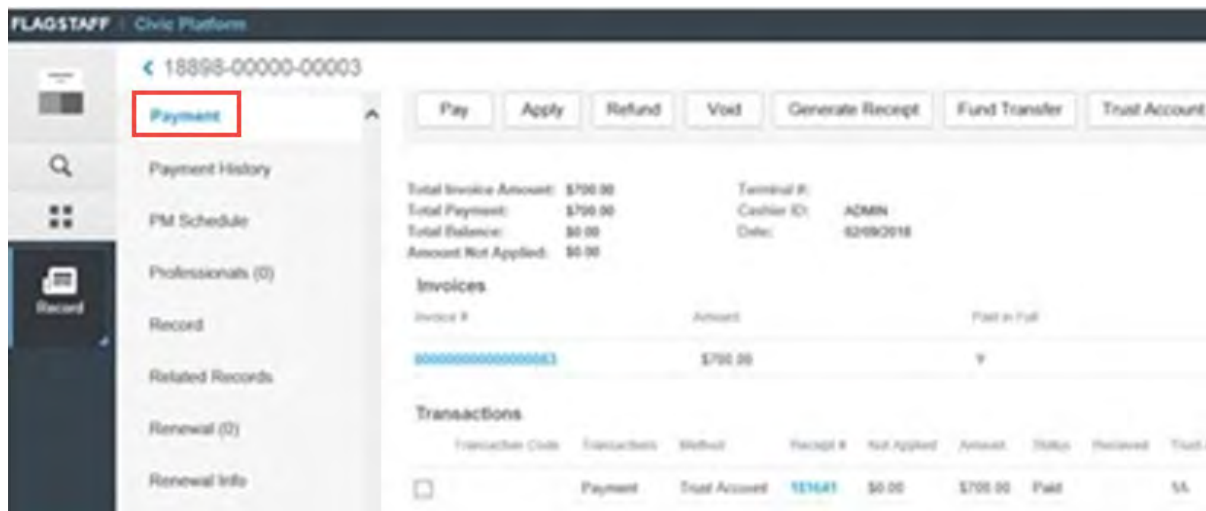
### Best Practices for Voiding and Crediting Fees

This section provides best practices for handling voids and unapplied fees in the back office. Adhering to these practices will enable citizens to view the correct amount for the fees they owe in Citizen Access, in the event that fees need to be voided or errors need to be corrected.

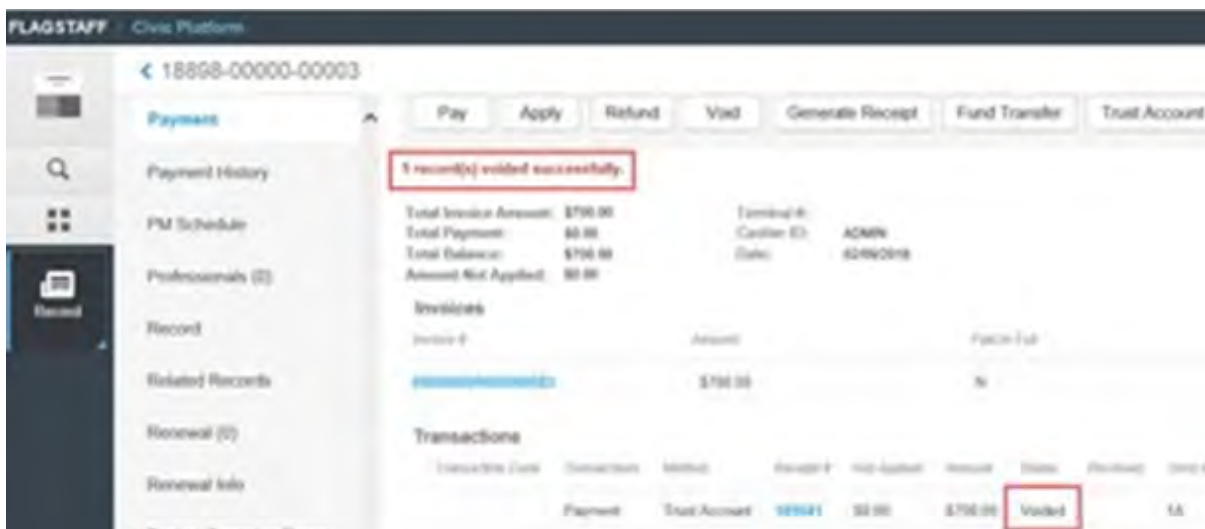
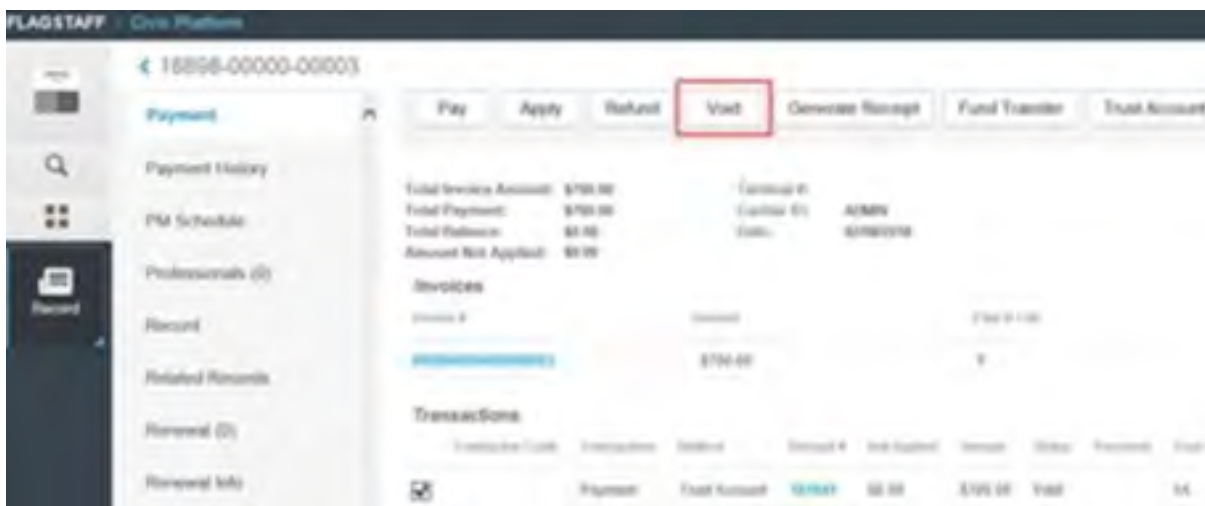
- Using Citizen Access, pay fees (the example below shows 2 fees paid).



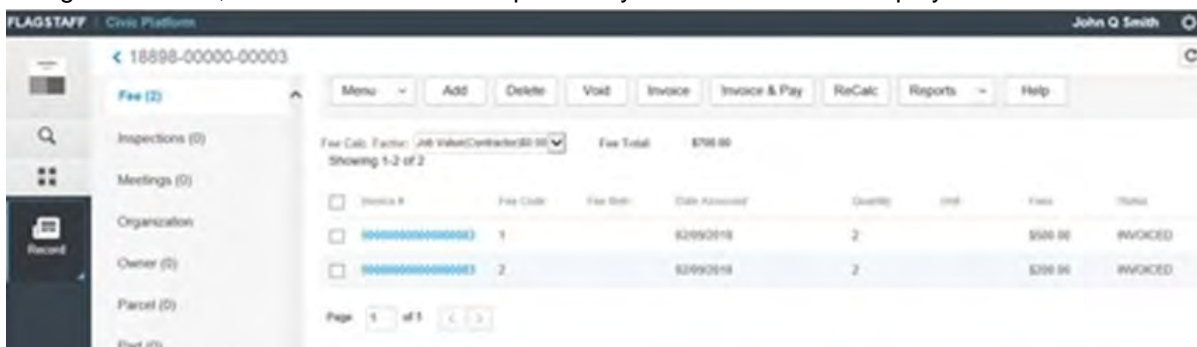
- Using Back Office, view the Payments tab to see payments.



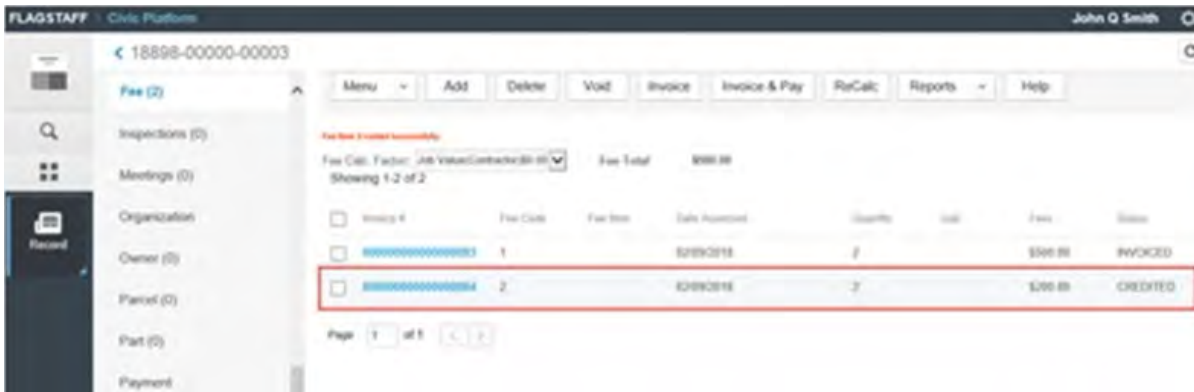
- Using Back Office, VOID the payment transaction from the Payment tab. The entire Payment is voided and the Total Balance is the previously Invoiced amount of all fee items.



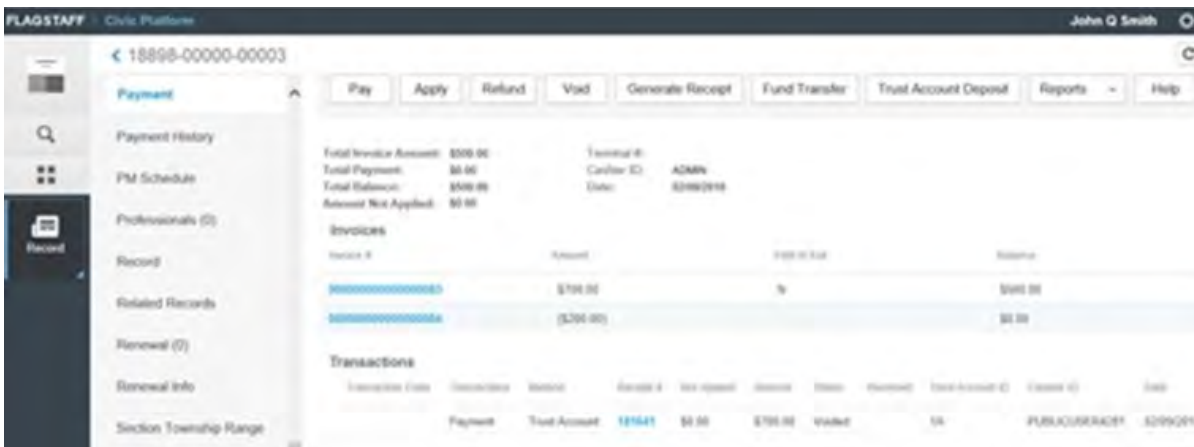
4. Using Back Office, select the Fee tab. The previously invoiced fee items display.



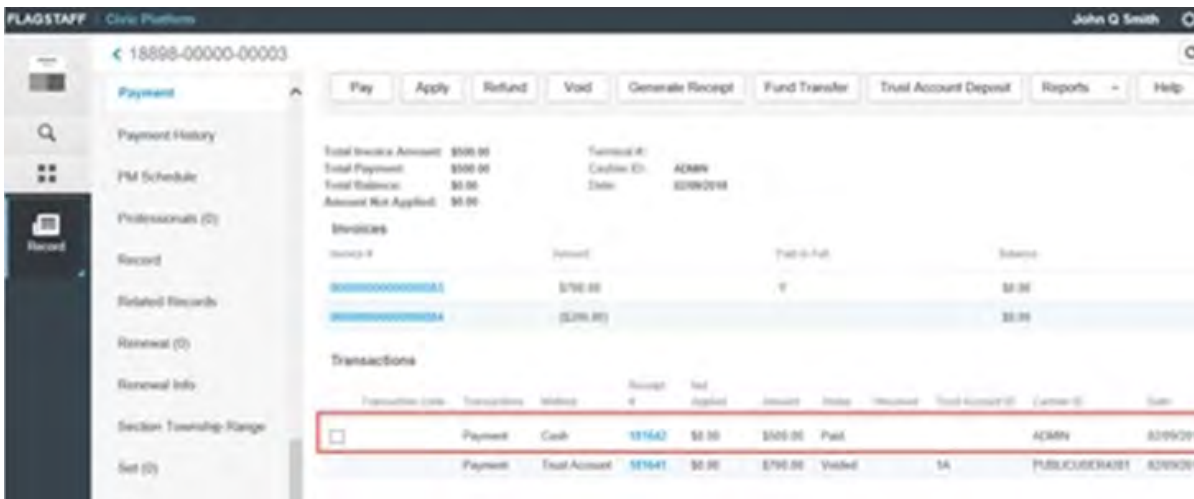
5. Using Back Office, VOID/CREDIT the appropriate Fee Item.



6. Using Back Office, go to the Payment tab and see that the Total Balance equals the relevant fee item.



7. Using Back Office, PAY the balance.



8. Using Citizen Access, view the Fees. Both Citizen Access and Back Office should show same paid

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**Application and Authorization 18898-00000-00003:**  
Winter

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Add to collection  
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Record Info ▾   **Payments ▾**   Education111 ▾   Assets   Custom Component

---

Attachment Instruction

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**Fees**

---

**Paid:**

Date	Invoice Number	Amount	<a href="#">View Receipt</a>
02/09/2018	0000000000000000000000083	\$500.00	
<b>Total paid fees: \$500.00</b>			

balance.

9. Using Back Office, INVOICE the new fee item.

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18898-00000-00003

Fee (3)

Menu ▾   Add   Delete   Void   Invoice   Invoice & Pay   ReCalc   Reports ▾   Help

Fee Calc. Factor   Job Value (Estimated)   Fee Total: \$750.00

Showing 1-3 of 3

Invoice #	Fee Code	Fee Desc.	Date Approved	Quantity	Unit	Price	Total
0000000000000000000000083	1		02/09/2018	2		\$300.00	INVOICED
0000000000000000000000084	2		02/09/2018	2		\$200.00	CREDITED
0000000000000000000000085	2		02/09/2018	2.5		\$750.00	INVOICED

Page 1 of 1

10. Using Back Office, view the Payments tab. The new balance is for the newly INVOICED fee item.

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18898-00000-00003

Payment

Pay   Apply   Refund   Void   Generate Receipt   Fund Transfer   Trust Account

Total Invoice Amount:	\$750.00	Terminal #:	
Total Payment:	\$500.00	Cashier ID:	ADMIN
Total Balance:	\$250.00	Date:	02/09/2018
Amount Not Applied:	\$0.00		

**Invoices**

Invoice #	Amount	Paid in Full
0000000000000000000000083	\$700.00	Y
0000000000000000000000084	(\$200.00)	
0000000000000000000000085	\$250.00	N

**Transactions**

Transaction Code	Transaction	Method	Receipt #	Not Applied	Amount	Status	Received	Trust
<input type="checkbox"/>	Payment	Cash	181542	\$0.00	\$500.00	Paid		
<input type="checkbox"/>	Payment	Trust Account	181541	\$0.00	\$700.00	Voided	SA	

11. Using Citizen Access, view the Fees tab. Verify that the balance due is equal to newly INVOICED amount.

## Examining the Accounting Interface Details

There are many detail forms and many fields you work with as you perform accounting processes. The following tables list and define the default fields available in the different interfaces you might encounter.

- [Fee List Fields](#)
- [Valuation Calculator Fields](#)
- [Batch Invoice Fields](#)
- [Common Payment Details](#)
- [Invoice Detail Fields](#)
- [Cash Payment Details](#)
- [Credit Card Payment Details](#)
- [Check Payment Details](#)
- [Refund Details](#)
- [Payment Summary Fields](#)
- [Receipt Details](#)
- [Trust Account Form Fields](#)
- [Payment Details for a Set](#)

### Fee List Fields

The following table defines the default fields on the fee list.

<b>Account Code 1/2/3</b>	A fee item may be comprised of several fees. For example, an application fee might include a registration fee and an examination fee. If configured by your agency administrator, Accela Civic Platform can automatically split the fee item to several fees, each associated with its specific account code. This field displays the account code(s) that get a portion of the fee.
<b>Account Fee 1/2/3</b>	This field displays the portion of the fee amount that Civic Platform is to allocate to the corresponding account code. For example, Account Fee 1 is the fee for Account Code 1. If you split a fee item among account codes, the sum of the amounts in Account Fee 1, Account Fee 2, and Account Fee 3 must equal the fee for the fee item.
<b>Date Assessed</b>	Assessment date of the fee for this application.
<b>Fee</b>	The total amount of the fee in dollars.
<b>Fee Code</b>	A unique code that identifies the fee item. The fee code often refers to the source or purpose of the fee item. For example, if you use this fee item to calculate the value of a window, the fee code can be "Window"
<b>Fee Item</b>	A brief description of the fee item. For example, you can enter the source or purpose for the fee.
<b>Invoice #</b>	A unique number that identifies the invoice on which this fee appears.

<b>Period</b>	The payment period that the fee belongs to. For example, if fee assessment and fee payment occur during the inspection phase, you can name the payment period "Inspection." A payment period is a subset of the fee schedule.
<b>Quantity</b>	The quantity entered upon fee assessment.
<b>Status</b>	Indicates where in the accounting process the fee currently is. For example, if the status is "New," the fee assessment occurred recently. If the Status is "Invoiced," a fee invoice exists. Click the link to the invoice number to view the invoice.
<b>Subgroup</b>	The subgroup period that the fee belongs to. A fee item may belong to multiple subgroups. A subgroup is a subset of the payment period.
<b>Unit</b>	The unit of work required for the occupancy. The unit allows you to calculate the value of the occupancy, or job value.

## Valuation Calculator Fields

The following table defines the default fields on the Valuation Calculator.

<b>Extra Amount</b>	Used to add extra dollar amounts to the Total Valuation. You can use positive or negative numbers.
<b>Exclude from Regional Modifier</b>	Use to create a valuation occupancy record that excludes the regional modifier to calculate total valuation. Clear this option to enable regional modifier functionality.
<b>Multiplier</b>	A numeric data field that Civic Platform uses to modify a valuation. Use the Multiplier field in addition to the Regional Modifier for calculations. An agency has the ability to value based on the multiplier alone, which means it can operate excluding the Regional Modifier. The value entered in this field multiplies the total Valuation (before Extra Amount) in addition to the regional modifier. Format the number with a decimal (max total numbers before decimal is 5 and max total number after decimal is 4).
<b>Occupancy</b>	The purpose or use of the property or building that you are valuating. An occupancy is typically a building or part of a building that someone intends to occupy. A few examples include apartments, homes, hospitals, auditoriums, churches, or banks.
<b>Unit Type</b>	The qualities of the occupancy that indicate the work required to build the occupancy. For example, if the occupancy is a basement, you might enter "finished" as the qualifier. Your agency administrator determines these values
<b>Unit</b>	The measurable unit of work required for the occupancy. The unit allows you to calculate the value of the occupancy, or job value.
<b>Unit Amount</b>	The total number of units.
<b>Version</b>	The occupancy version that you want to apply to the valuation calculation. For example, the occupancy is a Residential dwelling, and versions are single-dwellings and duplexes.

## Batch Invoice Fields

The following table defines the default fields on the Batch Invoice form.

<b>Alternate ID</b>	An alternate identification number for the invoice.
<b>Balance Due</b>	The unpaid amount on the invoice.
<b>Record ID</b>	The identification number for the record.
<b>Invoice Amount</b>	The total amount due on the invoice.
<b>Invoice Batch Date</b>	The date when you create the invoice.
<b>Invoice Batch Number</b>	The batch number that contains the invoice.
<b>Invoice Comment</b>	Enter any comments associated with the invoice.



<b>Invoice Date</b>	The generation date of the invoice.
<b>Invoice Due Date</b>	The date the fees on the invoice are due.
<b>Invoice Level</b>	The invoice level of importance.
<b>Invoice Number</b>	The invoice identification number.
<b>Invoice Status</b>	The status of the invoice. For example, paid.
<b>Invoice Status Date</b>	The date when the invoice status changed. For example, if a licensed professional made a partial payment.
<b>Print Invoice Number</b>	A number to identify the order that invoices print.
<b>Printed</b>	The date that the batch prints.

## Invoice Detail Fields

The following table defines the default fields on the Invoice Detail form.

<b>Fee</b>	For each fee item, the amount of the fee multiplied by the quantity.
<b>Fee Item</b>	A description of each fee itemized on the invoice.
<b>Invoice #</b>	A unique number that identifies the invoice.
<b>Invoice Date</b>	The date when the invoice generates.
<b>Period</b>	For each fee item on the invoice, the payment period to which a fee item belongs.
<b>Qty (Quantity)</b>	The assessment quantity for each fee item on the invoice.
<b>Record ID #</b>	The identification number of the application to which the invoice belongs.
<b>Total Fee</b>	The total amount owed on the invoice.

## Common Payment Details

The following table defines the common fields on the payment form for all the payment methods.

<b>Amount</b>	Enter the total payment amount. By default, the total balance owed populates this field.
<b>Balance</b>	In case of underpayment, this read-only field displays the under-paid amount with the following equation: <b>Balance= Fee Total-Total Tendered</b> . Otherwise, the field displays a zero (0.00).
<b>CC Auth Code</b>	The three digit authorization number located on back of the credit card.
<b>Change</b>	In case of overpayment, this field displays the amount of money due back to the payor. The over-paid amount populates the <b>Change</b> and <b>Unapplied Credit</b> fields with the following equation: <b>Change + Unapplied Credit= Total Tendered - Fee Total</b>  If the payment method is not Cash, both the <b>Change</b> and <b>Unapplied Credit</b> fields display as read-only, with a zero (0.00) in Change, and the total over-paid amount in <b>Unapplied Credit</b> . If the payment method is Cash, both fields are editable.
<b>Comment</b>	Any comments pertaining to the payment.
<b>Fee Total</b>	This read-only field displays the total amount of fees for all of the records and POS items listed in the Payment Processing portlet. If some fee items have outstanding negative fees, the total amount counts in the absolute values of the negative fees.
<b>Payment Method</b>	The form of payment. For example, cash or check. If you are accepting two different forms of payment, you can separately apply payments for each payment method.
<b>Total Tendered</b>	This read-only field displays the total monies received during the payment process on the selected records.

<b>Unapplied Credit</b>	<p>In case of overpayment, this field displays the over-paid amount to add to the record with the highest record ID in the Payment Processing portlet for future fees. Otherwise, the field displays as read-only with a zero (0.00). The over-paid amount populates the <b>Change</b> and <b>Unapplied Credit</b> fields with the following equation: <math>\text{Change} + \text{Unapplied Credit} = \text{Total Tendered} - \text{Fee Total}</math></p> <p>If the payment method is not Cash, both the <b>Change</b> and <b>Unapplied Credit</b> fields displays as read-only, with a zero (0.00) in <b>Change</b>, and the total over-paid amount in <b>Unapplied Credit</b>. If the payment method is Cash, both fields are editable.</p>
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## Cash Payment Details

The following table defines the default fields on the Cash Payment form in addition to the fields given in [Common Payment Details](#).

<b>Payor</b>	Enter the name of the payor. You can use the picker next to the field to select a payor from the payor list.
<b>Received</b>	Select the payment delivery method; for example, In Person, Mail, or Fax.
<b>Reference #</b>	If you are receiving a check payment, enter the check number. You can leave the field empty if the payment method is cash.

## Credit Card Payment Details

The following table defines the default fields on the Credit Card Payment form in addition to the fields given in [Common Payment Details](#).

<b>Account Number</b>	The credit card account number.
<b>Business Name</b>	Enter the business name of the credit card holder.
<b>Card Holder's Name</b>	If the payment method is Credit, enter the name of the credit card holder exactly as it appears on the credit card.
<b>Card Holder's Email</b>	Enter the email address of the credit card holder.
<b>Card Security Code</b>	If the payment method is Credit, enter the credit card security code located on the back of the credit card.
<b>Card Type</b>	From the drop-down list choose a credit card type. For example, Civic Platform accepts Discover, Master Card, American Express, Visa, and Diner's Club.
<b>Comment</b>	Enter any comments or notes about this transaction.
<b>City</b>	Enter the city of the credit card holder.
<b>Expiration Date</b>	Enter the credit card expiration date.
<b>Received</b>	Select the payment delivery method; for example, In Person, Mail, or Fax.
<b>State/Province</b>	From the drop-down list, choose the state or province where the card holder resides.
<b>Street Address</b>	Enter the street address of the credit card holder.
<b>Street Address2</b>	Enter the street address of the credit card holder into the Street Address and Street Address2 fields if the address needs two lines.
<b>Telephone</b>	Enter the telephone number of the credit card holder.
<b>Zip</b>	Enter the zip code of the credit card holder.

## Check Payment Details

The following table defines the default fields on the Check Payment detail form in addition to the fields given in [Common Payment Details](#).

<b>Account Number</b>	The checking account number on the bottom of the check.
<b>Business Name</b>	The business name of the check holder.
<b>Check Processing Type</b>	The check processing type. For example, Account Debit or Electronic Check.
<b>Check Holder's Email</b>	The email address of the check holder.
<b>Check Holder's Name</b>	The name of the check holder.
<b>Check Number</b>	The check number of the check.
<b>Check Type</b>	The check type From the drop-down list. For example, company or personal.
<b>City</b>	Enter the city of the credit card holder
<b>Comment</b>	Any comments or notes about this transaction.
<b>Driver License</b>	The drivers license number of the check holder.
<b>Phone Number</b>	The phone number of the check holder.
<b>Received</b>	The payment delivery method; for example, In Person, Mail, or Fax
<b>Routing Number</b>	The routing number on the bottom of the check.
<b>SSN/Federal Tax ID</b>	The check holder's social security number for personal checks or the company's federal tax id number for business checks.
<b>State/Province</b>	The state or province where the card holder resides.
<b>Street Address</b>	The street address of the check holder.
<b>Street Address2</b>	The street address of the check holder into the Street Address and Street Address2 fields if the address needs two lines.
<b>Zip</b>	The zip code of the check holder.

## Refund Details

The following table defines the default fields on the Refund detail forms in addition to the fields given in [Common Payment Details](#).

<b>CC Auth. Code</b>	The three digit authorization number located on back of the credit card.
<b>Comments</b>	Any important comments or notes about the refund payment.
<b>Method</b>	The method used to issue the refund payment. For example, Cash, Check, or Credit.
<b>Paid To</b>	The name of the person receiving the refund.
<b>Reason</b>	The reason for the refund.
<b>Reference #</b>	The check number or the number that identifies the other document.
<b>Refund Amount</b>	The total amount of money that you are actually refunding. This may or may not equal the total available amount. The amount available includes the balance of any payments that have not yet been applied as well as the total amount of any refunds that you just applied toward one or more fees.
<b>Refunded</b>	The manner in which the payment was refunded. For example, In Person, Mail, or Fax.
<b>Trust Account</b>	The trust account to return the funds to.

## Payment Summary Fields

The following table defines the default fields on the Payment Summary form.

<b>Amount</b>	The total amount due of all fee items listed on the invoice.
<b>Amount</b>	The total amount of the payment or the refund transaction.

<b>Amount Not Applied</b>	The total amount of unallocated payments.
<b>Balance</b>	This field displays the difference between the total amount owed on the invoice and the total amount paid. A zero displays in this field if the customer has paid all of the fees in full.
<b>Cashier ID</b>	Your identification name or your identification number. This ID shows up on any fees, invoices, and receipts that you generate.
<b>Date</b>	Today's date. This date shows up on any fees, invoices, and receipts that you generate today.
<b>Date</b>	The date of the transaction.
<b>Full Paid</b>	Indicates payment status. A "Y" value in this field indicates there are no outstanding balances on this invoice. A "N" indicates there are outstanding fees awaiting payment.
<b>Invoice #</b>	A unique number that identifies the invoice.
<b>Method</b>	The method of payment such as credit, cash, or check.
<b>Not Applied</b>	The amount of the payment or the refund that Civic Platform has not allocated to an invoiced fee.
<b>Receipt #</b>	If you generate a receipt for a transaction (payment or refund), the receipt number identifies the receipt.
<b>Received</b>	The payment delivery method; for example, In Person, Mail, or Fax.
<b>Status</b>	The current status of the transaction such as paid or voided.
<b>Terminal #</b>	An identification name or an identification number that identifies the terminal you are using to accept payments. This ID shows up on any fees, invoices, and receipts that you generate.
<b>Total Balance</b>	The difference between the total amount of invoiced fees and any payments that Civic Platform has applied toward this application.
<b>Total Invoice Amount</b>	The total amount of fees invoiced to the applicant, billing contact, organization, or other responsible party.
<b>Total Payment</b>	The total amount of payments received from the applicant, billing contact, organization, or other responsible party.
<b>Transactions</b>	The type of transaction such as payment or refund.

## Receipt Details

The following table defines the default fields on the Receipt detail form.

<b>Amount Paid</b>	The total amount of the payment or the refund transaction.
<b>Cashier ID</b>	The identification name or the identification number of the individual responsible for the transaction.
<b>Comments</b>	Any comments surrounding the transaction.
<b>Owner Info</b>	The contact responsible for making a payment or receiving a refund.
<b>Payment Date</b>	The date when the transaction occurred.
<b>Payment Method</b>	The method of payment such as credit, cash, or check.
<b>Receipt No</b>	If you generate a receipt for a transaction (payment or refund), the receipt number identifies the receipt.
<b>Ref Number</b>	The check number or number that appears on the document.
<b>Work Description</b>	The type of application to which the transaction or payment applies. For example, the application type may be "New Residential" if the application is for a new home.

## Trust Account Form Fields

The following table defines the default fields on the Trust Account form.

<b>Account ID</b>	The account ID number for the trust account.
<b>Balance</b>	The balance of the trust account in dollars
<b>City</b>	The city corresponding to the address on record.
<b>County</b>	The county corresponding to the address on record.
<b>Description</b>	The description of the trust account.
<b>Dir</b>	The type of street, such as "Lane" or "Avenue."
<b>Direction</b>	The street direction. For example, choose <i>N</i> to indicate a north direction, such as <i>North</i> Broadway.
<b>Distance</b>	The distance from another landmark used to locate the address.
<b>First Name</b>	The first name of the individual responsible for the trust account.
<b>Inspection District Prefix</b>	The prefix for the inspection district within which the address resides.
<b>Last Name</b>	The last name of the individual responsible for the trust account.
<b>Ledger Account</b>	The ledger account of the trust account.
<b>Lot</b>	The name, or boundaries, of the lot associated with the application.
<b>Middle Name</b>	The middle name of the individual responsible for the trust account.
<b>Neighborhood</b>	The neighborhood within which the address resides.
<b>Neighborhood Prefix</b>	The prefix for the neighborhood within which the address resides.
<b>Organization Name</b>	The organization name of the contact associated with the trust account.
<b>Overdraft</b>	This defines whether the trust account can use an overdraft option.
<b>Overdraft Limit</b>	The overdraft limit amount, in dollars, for the trust account.
<b>Parcel #</b>	Full or partial parcel number.
<b>People Type</b>	Type of contact associated with the trust account.
<b>Prefix</b>	Any part of the address that should come before the street name or the number, such as a direction. For example "north" in North Willow Drive.
<b>Range</b>	The range number of the address.
<b>Reference Address ID</b>	The identification for any reference address.
<b>Secondary Road</b>	The road for the secondary address.
<b>Secondary Road Number</b>	The number of the address's secondary road.
<b>Section</b>	The section of the subdivision in which the address resides.
<b>State</b>	The state corresponding to the address on record
<b>Status</b>	The status of the trust account (open or closed).
<b>Street Name</b>	The street name for the address.
<b>Street # (start/end)</b>	The street number(s) of the property. If the address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.

<b>Type</b>	The type of item associated with the property that you are searching for, such as Licensed Professional, Contact, Address or Parcel.
<b>Unit # (Number)</b>	The unit or the apartment number. When searching for an address, you may be able to specify a range of numbers in the corresponding Start and End fields.
<b>Unit Type</b>	The type of structure for this address, for example, apartment or condo.
<b>X Coordinate</b>	The latitudinal coordinate for the address.
<b>Y Coordinate</b>	The longitudinal coordinate for the address.

## Payment Details for a Set

The following table defines the default fields on the Payment Details form for a set.

<b>Amount</b>	The total payment amount.
<b>Bank Name</b>	The name of the bank that issued the credit card or the check.
<b>CC Auth Code</b>	The credit card number.
<b>CC Exp Date</b>	The credit card's expiration date.
<b>CC Holder Name</b>	The name of the credit card holder as it appears on the credit card.
<b>Check Holder's Email</b>	The email address of the check holder.
<b>Check Holder's Name</b>	The name of the check holder.
<b>Check Number</b>	The check number.
<b>Check Type</b>	The check type from the drop-down list. For example, company or personal.
<b>City</b>	The city of the payor.
<b>Comment</b>	Comments to help identify or explain the reason for this payment. If there are any special circumstances for this payment, indicate them here.
<b>Country/Region</b>	The country or region of the payor.
<b>Driver's License</b>	The drivers license number of the payor.
<b>Method</b>	The payment method. For example, choose Cash, Check, or Credit Card. If your agency uses a cash drawer and if the method of payment is cash or check, then Civic Platform opens the cash drawer so that you can put the payment into the cash drawer.
<b>Payor</b>	The name of the payor.
<b>Phone Number</b>	The phone number of the payor.
<b>Received</b>	The payment delivery method; for example, In Person, Mail, or Fax.
<b>Reference #</b>	If you are receiving a check payment, this is the check number.
<b>State</b>	The state where the payor is located.
<b>Trust Account</b>	The number or code that identifies the terminal where you are accepting payment.
<b>Zip</b>	The zip code of the payor.

## Cashier Session Form Fields

The following table defines the default fields on the Cashier Session form.

<b>Begin Time</b>	Use the From and To fields to enter the date parameters that you want to use for your search.
<b>Deposit Date</b>	Specify a deposit date in this field (Supervisors only). After submittal, you can modify both the Deposit Slip # and the Deposit Date fields.

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<b>Deposit Slip #</b>	After a cashier deposits the total dollar amount of a cashier session in a bank, the bank issues a deposit slip #. A supervisor can modify this value after someone enters a deposit date.
<b>End Time</b>	Use the From and To fields to enter the date parameters that you want to use for your search. Civic Platform returns cashier sessions with dates that fall within the range you specified.
<b>First Name</b>	The first name of the cashier that you want to search for.
<b>Last Name</b>	The last name of the cashier that you want to search for.
<b>Session Number</b>	The cashier session number that you want to search for.
<b>Status</b>	<b>Closed</b> Select to search for closed cashier sessions. <b>Enabled</b> Select to search for active cashier sessions.

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## Activities

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Choose a topic from the list below to learn more about working with activities.

### **Related Information**

[Working with Activities in the My Tasks Portlet](#)

[Working with Activities for Records](#)

[Working with Activities for People and Property](#)

[Examining Activity Details](#)



## Working with Activities in the My Tasks Portlet

Activities refer to a past action or past event related to a record. You can assign activities to a staff member when the activities require further action, such as a follow-up inspection or a phone-call.

### Topics

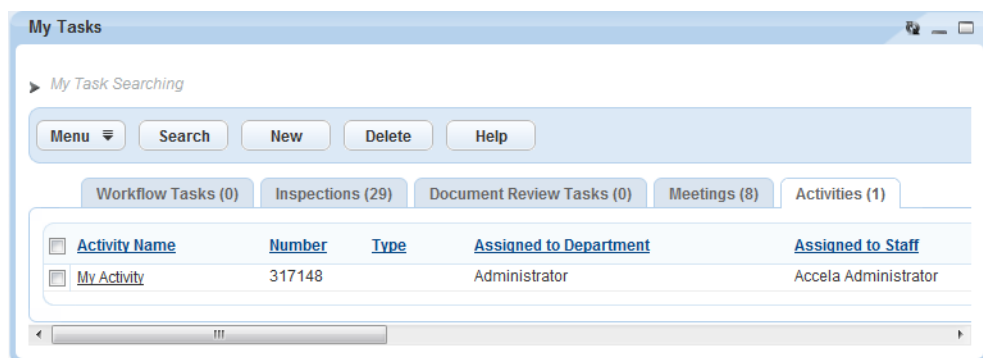
- [Viewing Activities](#)
- [Finding Activities](#)
- [Creating an Activity](#)
- [Deleting Activities](#)

### Viewing Activities

You view activities through the Activities tab of the My Tasks portlet.

#### To view activities

1. Access the My Tasks portlet.
2. Click the Activities tab.  
Civic Platform displays your activities.



### Finding Activities

You can use the My Tasks portlet to find activities assigned to you or others.

#### To find activities

1. Access the My Tasks portlet.
2. Click the Activities tab.  
Civic Platform displays your activities.
3. Click **Search**.  
Civic Platform displays the activity search form.

4. Complete search criteria in as appropriate to locate the activity you want.
5. Click **Submit**.  
Civic Platform displays the search results.

## Creating an Activity

You can create new activities from the My Tasks portlet or the Records portlet.

### To create a new activity

1. Either access the My Tasks portlet or the Records portlet.
2. If you accessed the Records portlet, locate and select the record you want to work with.
3. Click the Activities tab.  
Civic Platform displays assigned activities.
4. Click **New**.  
Civic Platform displays an activity detail form.

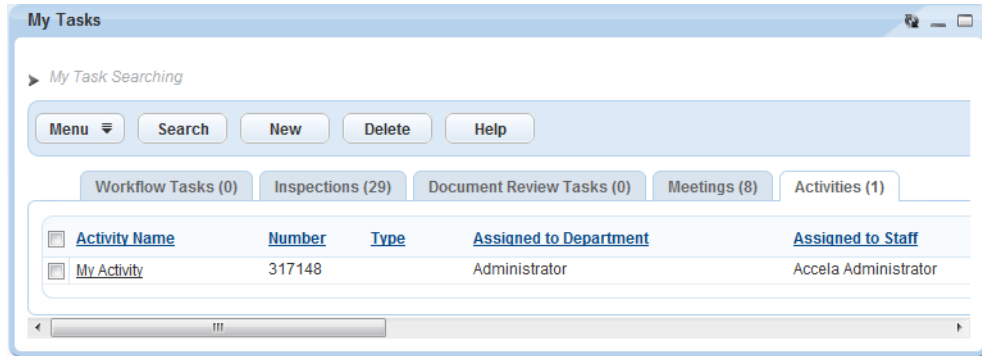
5. Complete the fields with available data. See [Examining Activity Details](#) for field definitions.
6. Click **Submit**.  
Civic Platform creates the activity.

## Deleting Activities

You can delete multiple activities from your activity list.

### To delete an activity

1. Access the My Tasks portlet.
2. Click the Activities tab.  
Civic Platform displays your activities.



3. Select one or more activities to delete.
4. Click **Delete**.  
Civic Platform removes the activity from your activity list.

## Working with Activities for Records

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### Topics

- [Adding a New Activity to a Record](#)
- [Updating an Activity on the Activity Tab](#)
- [Viewing the Activity Summary](#)

### Adding a New Activity to a Record

Add a new activity when a new action takes place on a record.

#### To add a new activity

1. Open the Building or Service Request portlet and use search to locate the application or the service request to which you want to add an activity. See [Using the Search Features](#) for more information.
2. Click the link in the Record ID column to select the desired application or service request. Civic Platform displays the details.
3. Click the Activities tab. Civic Platform displays the activities assigned to the application or service request.
4. Click **New**. Civic Platform displays a form you can use to enter activity information.
5. Complete the fields in the form with available data. See [Examining Activity Details](#) for a list of fields and field definitions that may be available.
6. Click **Submit**. Civic Platform saves your changes and returns you to the Activities tab.

### Updating an Activity on the Activity Tab

In the Activities tab, you can update an existing activity. You can update any general information about the activity, such as the name, the creation date, or the department to which the activity belongs. To update the occurrence date of an activity, see [Viewing the Activity Summary](#).

#### To modify an activity for an application or service request

1. Open the Building or Service Request portlet and use search to locate the application or service request you want to work with. See [Using the Search Features](#) for more information about using Search.
2. Click the Activities tab. Civic Platform displays the activities assigned to the application or service request.
3. In the **Number** column, click the link for the activity you want to modify. Civic Platform displays the activity details on the tabs.
4. Make changes as needed (see [Examining Activity Details](#) for field definitions).
5. Click **Submit**. Civic Platform displays the changes in the Activities form portlet.

## Viewing the Activity Summary

The Activity Summary secondary tab lists both the activities associated with an application or a service request and any completed ad hoc and workflow tasks. You can click the Name link for an activity/task record in this tab to view details.

### To view the activity summary

1. Open the Building or Service Request portlet and use search to locate the application or service request you want to work with. See [Using the Search Features](#) for more information about using Search. Civic Platform displays the application details.
2. Click the Activity Summary tab. Civic Platform displays a summary of the activities and tasks.
3. In the **Name** column, click the link for the activity/tasks you want to view. Civic Platform displays the selected activity/task information in its respective tab: if an activity, it displays in the Activity tab; if a task, it displays in the Task Details tab.

## Working with Activities for People and Property

You can associate activity types with address, parcel, owner, contact, and licensed professional data. This association enables agencies to record simple actions related to people and property that do not require an application or service request. For example, you might associate a “phone call” activity type with a licensed professional. When a user sees this activity type, he knows to call the associated licensed professional, and add the information about the phone call in the Description field.

### Topics

- [Activities for Parcels](#)
- [Activities for Addresses](#)
- [Activity for People](#)

### Activities for Parcels

A parcel can have an associated activity type. This association enables agencies to record simple actions related to people and property that do not require an application or a service request. You can create, view, edit, copy, move, and delete activity types for parcels.

### Topics

- [Creating an Activity for Parcels](#)
- [Updating a Parcel Activity](#)
- [Copying or Moving a Parcel Activity](#)
- [Deleting an Activity from a Parcel](#)

### Creating an Activity for Parcels

1. On the Parcel portlet, use search to locate the parcel to which you want to add an activity, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
2. Click the Activity tab.  
Civic Platform displays the activities assigned to the parcel.

Number	Name	Type	Date	Assigned to Staff	Assigned to Department	Record ID	Alternate ID
334843	Plant Tree	Photos	01/24/2013	ADREW	SOUTH/LK/NA/NA/NA/NA...	13HST-00000-00013	HIST13-0013

3. Click **New**.  
Civic Platform displays an Activity detail form portlet.

#### 4. Complete the Activity fields.

**Activity Name**

Enter the name you give to the activity.

**Activity Type**

Select the activity type from the drop-down list.



**Note:**

At your selection of the activity type, some additional fields may appear below the default fields.

**Description**

Enter a short summary of the action taken related to the activity.

#### 5. Click **Submit** to save your changes.

Civic Platform displays the parcel's new activity on the list.

### Updating a Parcel Activity

1. On the Parcel portlet, use search to locate the parcel to which you want to add an activity, and click the link in the Parcel # column.

Civic Platform displays the parcel details.

2. Click the Activity tab.

Civic Platform displays the activities assigned to the parcel.

3. Click the activity you want to update.

Civic Platform displays the Activity detail form portlet.

4. Modify the fields as needed.

5. Click **Submit**.

### Copying or Moving a Parcel Activity

After you split or merge a parcel, you may need to maintain the activities assigned to the parcel. To do this, copy or move the activities between genealogically related parcels as needed.

#### To copy or move an associated parcel activity

1. On the Parcel portlet, use search to locate the parcel to which you want to add an activity, and click the link in the Parcel # column.

Civic Platform displays the parcel details.

2. Click the Activity tab.

Civic Platform displays the activities assigned to the parcel.

3. Do one of the following:

- Copy the associated parcel activity between two genealogically related parcels:
  1. Select the activity you want to copy and click **Copy**.  
Civic Platform displays a list of parcels including the current parcel and its immediate parents, siblings, and children.
  2. Select the destination parcel(s).
  3. Click **Submit**.  
Civic Platform associates the activity with the newly selected parcel and retains the association between the activity and the original parcel.
- Move the associated activity between two genealogically related parcels:
  1. Select the activity that you want to move and click **Move**.  
Civic Platform displays a list of parcels including the current parcel and its immediate parents, siblings, and children.
  2. Select the destination parcel(s).
  3. Click **Submit**.  
Civic Platform associates the activity with the newly selected parcel and disassociates the activity from the original parcel.

### Deleting an Activity from a Parcel

1. On the Parcel portlet, use search to locate the parcel to which you want to add an activity, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
2. Click the Activity tab.  
Civic Platform displays the activities assigned to the parcel.
3. Select the activity you want to delete from the parcel.
4. Click **Delete**.  
Civic Platform confirms the deletion.

### Activities for Addresses

An address can have an associated activity type. This association enables agencies to record simple actions related to people and property that do not require an application or service request. You can create, view, edit, copy, move, and delete activity types for addresses.

#### Topics

- [Creating an Activity for Addresses](#)
- [Updating an Address Activity](#)
- [Deleting an Activity from an Address](#)

### Creating an Activity for Addresses

1. On the Address portlet, use search to locate the address to which you want to add an activity, and click the link in the Number column.



Civic Platform displays the parcel details.

2. Click the Activity tab.

3. Click **New**.

4. Complete the following fields.

**Activity Name** Enter the name you give to the activity.

**Activity Type** Select the activity type from the drop-down list.



**Note:**

At your selection of the activity type, some additional fields may appear below the default fields.

**Description** Enter a short summary of the action taken related to the activity.

5. Click **Submit**.

Civic Platform displays the new activity on the list.

## Updating an Address Activity

After an activity status changes, you can update any general information about the activity, such as the name, the department the activity belongs, or the creation date.

### To update an activity for an address

1. On the Address portlet, use search to locate the address to which you want to add an activity, and click the link in the Number column.

2. Click the Activity tab.

Civic Platform displays the Assigned activities address list.

3. Click the activity you want to update.

4. Modify the fields as needed.

5. Click **Submit**.

Civic Platform displays your changes.

## Deleting an Activity from an Address

If an activity is no longer needed, you can delete it from an address.

### To delete an activity from an address

1. On the Address portlet, use search to locate the address to which you want to add an activity, and click the link in the Number column.

Civic Platform displays the parcel details.

2. Click the Activity tab.

Civic Platform displays the Assigned activities address list.

3. Select the activity you want to delete from the address.

4. Click **Delete**.

## Activity for People

People, including owners, contacts, and licensed professionals, can have an associated activity type. This association enables agencies to record simple actions related to people and property that do not require an application or service request. You can create, view, edit, copy, move, and delete activity types for people in the Activity tab of the Contact, Owner, and Licensed Professional portlets.



### Note:

The Activity tabs in the Contact, Owner, and Licensed Professional portlets are identical in both appearance and functionality. This section focuses on the steps to create and manage activities in the Owner portlet. The same steps apply when working in the Contact or Licensed Professional portlet.

## Topics

- [Creating an Activity for Owners](#)
- [Updating an Owner Activity](#)
- [Deleting an Activity from an Owner](#)

## Creating an Activity for Owners

You can add activities to owner records. For example, you can associate a phone call activity type with an owner. When a user sees a phone call activity type, he knows that he must call the associated owner and then enter information about the phone call in the Description field.

### To add a new activity to an owner

1. On the Owner portlet, use search to locate the owner for whom you want to add an activity, and click the link in the Name column.  
Civic Platform displays the parcel details.
2. Click the Activity tab.
3. Click **New**.  
Civic Platform displays an Activity detail form portlet.
4. Complete the following fields.
 

<b>Activity Name</b>	Enter the name you give to the activity.
<b>Activity Type</b>	Select the activity type from the drop-down list. Additional fields may display. Complete them with available data.
<b>Description</b>	Enter a short summary of the action taken related to the activity.
5. Click **Submit**.  
Civic Platform displays your changes.

## Updating an Owner Activity

1. On the Owner portlet, use search to locate the owner for whom you want to add an activity, and click the link in the Name column.  
Civic Platform displays the parcel details.
2. Click the Activity tab.
3. Click the activity you want to update.

4. Modify the fields as needed.
5. Click **Submit**.  
Civic Platform displays your changes.

### **Deleting an Activity from an Owner**

If an activity is no longer needed, you can delete it from an owner.

#### **To delete an activity from an owner**

1. On the Owner portlet, use search to locate the owner for whom you want to add an activity, and click the link in the Name column.  
Civic Platform displays the parcel details.
2. Click the Activity tab.  
Civic Platform displays the activities assigned to the owner.
3. Select the activity you want to delete.
4. Click **Delete**.  
Civic Platform confirms that it successfully deleted the activity.

## Examining Activity Details

The following table lists and defines fields that may be available as you work with activities.

Label	Description
<b>Activity Name*</b>	The name of the activity.
<b>Activity Number</b>	The activity number as assigned by Civic Platform.
<b>Assigned to Department</b>	The department responsible for addressing the activity.
<b>Assigned to Staff - Check Availability</b>	The staff assigned to address the activity. The Check Availability link, when clicked, shows the availability of the assigned to staff based on all their scheduled calendar events.
<b>Start Date*</b>	The beginning date of the activity.
<b>Due Date</b>	The due date for the activity.
<b>Priority</b>	The priority level for the completion of the activity.
<b>Type</b>	The type of activity. Civic Platform may associate some activity types with an activity specific info group. In such cases, subgroup fields display automatically below the activity fields.
<b>Activity Status</b>	This is the status of the activity.
<b>Description</b>	A description of the activity.
<b>Internal Only*</b>	Indicates whether the record is for internal use only.

# Attachments

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Choose a topic from the list below to learn more about working with attachments.

## **Related Information**

[Attachments Overview](#)

[Attaching Files](#)

[Accessing an Attachment](#)

[Accessing Attachments via a GIS Map](#)

[Defining ACA Permissions for a Document](#)

[Previewing Attachments](#)

[Downloading Attachments](#)

[Setting the Display Image](#)

[Viewing Attachment Information](#)

[Deleting an Attachment](#)

[Working with Accela Document Scan](#)

## Attachments Overview

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Attachments are electronic files such as PDFs or image files that you can upload from your computer to your Civic Platform server, and then associate with a licensed professional, inspection, parcel, asset, part, calendar, or other record. Attachments can be just about any relevant document or file, such as special instructions, diagrams, pictures, or other information relevant to the record. An audit log is available that you can use to review the information about attachments, such as when an attachment is uploaded or deleted, or when its access permissions to Citizen Access users are modified. See [Audit Logs](#) for information about the document audit log.

If your agency implements Citizen Access, administrators have the ability to use the documentation portlet to assign public user permissions for each attachment associated with a record.

Civic Platform can be configured to enable an electronic document review process. See [Electronic Document Review](#) for more information.

## Attaching Files

You can upload new attachments from your computer, or you can link to an existing attachment on another record.

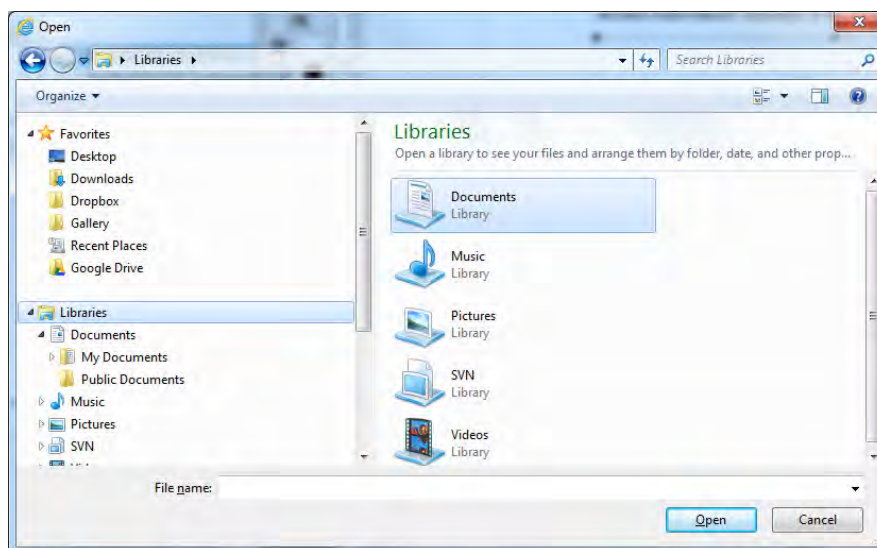


### Note:

- When you attach image files an asset record, you can set one of those files as the asset's display image, which is displayed in the record detail for the asset record as well as in the linked asset view. For more information about asset display images, see [Setting an Asset Display Image](#).
- When uploading a single file in Civic Platform, a 1GB maximum file size is supported. When uploading multiple files, 10 files may be uploaded in one batch. No single batch should exceed 1GB. The Civic Platform administrator must configure the EDMS standard choice parameter EDMS\_DOCUMENT\_SIZE\_MAX.

### To attach one or more files

1. Navigate to the list portlet where you want to attach a document.  
Civic Platform displays a list of records.
2. Click the link to the record to which you want to attach a file.  
If you do not see the record you are looking for, use Search to locate and select the desired record.  
Civic Platform displays the record details portlet.
3. Click the Documents tab.  
Civic Platform displays a list of documents and attachments for the record.
4. Click **New**.
5. Click **Add**.  
Civic Platform displays a standard file selection dialog box.



6. Locate and choose the file(s) you want to attach. You can choose one file or multiple files in the same folder (hold down the Shift or Ctrl key as you click each file).
7. Click **Open**.  
Civic Platform uploads the files and lists them below the Apply Definitions to Selected link.

The screenshot shows a web interface for document management. At the top, there's a header 'Documents (0)'. Below it, a form allows defining document attributes: 'Document Group/Category' (dropdown), 'Document Name' (text input), 'Document Description' (text area), 'EDMS Name' (dropdown), and 'User E-mail' (text input). There are also links for 'check spelling', 'Virtual Folders', and 'ACA Permissions Change'. Below the form is a table titled 'Apply Definitions to Selected' with columns: File Name, Document Name, Document Group/Category, Document Description, User E-mail, ACA Permissions, and Virtual Folders. The table lists three attachments: 'Test Document Attachment.pdf', 'SAMPLE BUSINESS LETTER2.htm', and 'SAMPLE BUSINESS LETTER.htm'. An orange arrow points to the table with the text 'Attachments display here...'.

8. Apply attachment definitions as appropriate:

- a. Set the attributes (for example, Document Group/Category or EDMS Name) you want to apply. For a list of the most common fields, see [Attachment Fields](#).
- b. Select the attachments to which you want to apply the attributes.
- c. Click **Apply Definitions to Selected**. Civic Platform applies defined attributes to the attachments that you selected.

This screenshot provides a closer look at the 'Apply Definitions to Selected' table. The table has columns for 'File Name', 'Document Name', 'Document Group/Category', and 'Document Description'. The first row, 'Test Document Attachment.pdf', is unselected. The second and third rows, 'SAMPLE BUSINESS LETTER2.htm' and 'SAMPLE BUSINESS LETTER.htm', are selected. Orange boxes highlight the 'Document Group/Category' dropdowns for the selected rows, which are set to 'BLD' and 'Correspondence'. An orange arrow also points from the 'Document Group/Category' dropdown in the top form to these dropdowns in the table.

File Name	Document Name	Document Group/Category	Document Description
<input type="checkbox"/> Test Document Attachment.pdf 100 %		--Select--	
<input checked="" type="checkbox"/> SAMPLE BUSINESS LETTER2.htm 100 %		BLD	Correspondence
<input checked="" type="checkbox"/> SAMPLE BUSINESS LETTER.htm 100 %		BLD	Correspondence



- d. If you want to define attributes/definitions to individual documents, you can modify each document's attributes/definitions in the list as needed.
- e. Click **Save**.  
Civic Platform saves the attachments along with any applied attributes/definitions to the selected record. The newly uploaded attachments appear on the Documents tab.

## Accessing an Attachment

Once an electronic file is attached to a record, the attachment details can be reviewed. If the attachment is an electronic file supported by your web browser, the file can also be viewed in the browser. If the file cannot be viewed from within your web browser, you may choose to download it to a hard drive and open it in the software application that was used to create it, or use Acrobat Reader, for example, to open a PDF.

### To access an attachment

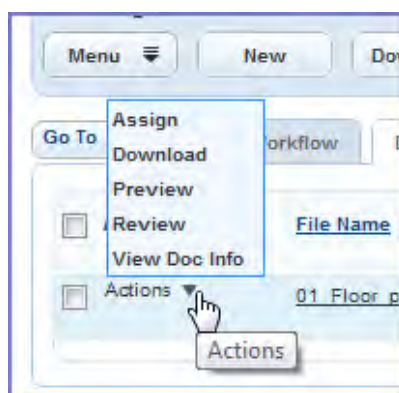
1. Navigate to the list portlet you are using and use Search to locate the record you want to work with.
2. Click the link to the record you want.
3. Click the Documents tab.
4. Optionally, if you are accessing the attachments of an application or a service request record, select the type of attachments list you want to view.

There are two options:

- **Record Attachments**- Mark this option to view the files directly attached to the current record. This is the default option.
- **People Attachments** - Mark this option to view the files attached to the licensed professionals or reference contacts who are associated with the current record.

You can look up people attachments to associate with records, or associate record attachments with people. For more information, see [Looking Up People Attachments to Associate with Records](#) and [Associating Record Attachments with People](#).

5. Click the File Name link for the attachment you want to view. For the attachment fields, see [Attachment Fields](#).
6. To download the file, open the Actions menu for the desired attachment by clicking the down arrow, and then select **Download**.



Civic Platform displays the attachment in a new window.

7. To download multiple documents, choose the documents and click **Manage Documents > Download**. Note that the Civic Platform administrator must grant Upload and Download permission on the Administration > Agency Profile > Security Policy > EDMS Access Security > {EDMS-Name} to enable multiple document downloads.

To print multiple documents, choose the documents and click **Manage Documents > Print**. Note that the **Print** option only shows if the Civic Platform administrator has configured FID 8508 Print Multiple Documents with Full Access.

## Looking Up People Attachments to Associate with Records

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If a record is associated with a contact or licensed professional to which you or other users already uploaded a document, you can associate a document (people attachment) from the contact or licensed professional to the record. This way, the document not only appears in the people attachments list, but also in the record attachments list.

### To look up a people attachment to associate with a record

1. Navigate to the Records portlet.
2. Do one of the following:
  - Create a new record, associate one or more contacts or licensed professional with the record, and then locate the Documents section in the application intake form.
  - If the record you want to work with already exists, use Search to locate and select the record, and click the Documents tab.
3. Click **Look Up**.

Civic Platform displays a list of the documents from the record-associated contacts and license professionals that have not been added to the record yet.

**Note:**

Civic Platform checks your agency's EDMS security settings and only displays the documents that you have permission to view.

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4. Select the documents you want to add to the record, and click **Select**.

Civic Platform adds the selected document to the record documents list, populates the following document settings from the source contacts or licensed professionals to the record document: File Name (Document Name), Description, Document Group/Category, Department, Uploaded By/On, Size, Document Status/Status Date, Type, Modified By/Date, Source, and template fields.
5. Modify the document settings if needed.
  - If you associate the document with a new record in the application intake form, you can modify the following fields: Document Group/Category, Description, Department, template fields, and assign virtual folders to the document.
  - If you associate the document with an existing record, you can open the Document Information window for the document, and modify the following fields: ACA Permissions (default: follow document type security), Document Group/Category, Description, Department, Status, template fields, and assign virtual folders to the document.

## Associating Record Attachments with People

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When you upload a document to a record, you may want to attach the document to the contact or licensed professional that is associated with the current record, for the convenience of reusing the same document in the future records. You can attach the record document to the contact or licensed professional.

### To associate a record attachment to people in the application intake form

1. Navigate to the Records portlet to create a new record.
2. Associate one or more contacts or licensed professional with the record.
3. Locate the Documents section in the application intake form, and click **Add**.
4. Locate and choose the document you want to attach to the record.
5. When adding document definitions to the document, select the contact or licensed professional from the **Also Attach To** drop-down list, which is the people you want to attach the document to.  
Civic Platform adds the selected document(s) to the contact or licensed professional, and populates the following document settings from the record to the contact or licensed professional: File Name (Document Name), Description, Department, Document Group/Category, Description, Modified By/Date, Uploaded By/On, Size, Type, Source, and template fields.
6. Proceed to the rest record-creation steps.

### To associate a record attachment to people in the record portlet

1. Navigate to the Records portlet.
2. Use Search to locate and select the record, and click the Documents tab.
3. Select the document(s) you want to attach to people.
4. Hover the mouse cursor on the **Manage Documents** button, then select **Add to People** from the command menu.  
Civic Platform displays the list of contacts or licensed professionals that are associated with the record. If none are associated with the record, Civic Platform prompts an error message.
5. Select the contact or licensed professional to which you want to attach the selected document(s), and click **Select**.  
Civic Platform adds the selected document(s) to the contact or licensed professional, and populates the following document settings from the record to the contact or licensed professional: File Name (Document Name), Description, Department, Document Group/Category, Document Status/ Status Date, Description, Modified By/Date, Uploaded By/On, Size, Type, and Source, and template fields.
6. Modify the document settings if needed. You can open the Document Information window for the document, and modify the following fields: ACA Permissions, Document Group/Category, Description, Department, Status, template fields, and assign virtual folders to the document.  
For information on ACA Permissions, see [Defining ACA Permissions for a Document](#).

## Accessing Attachments via a GIS Map

If your agency uses Accela GIS, you can view documents attached to a record or a parcel from a GIS map.

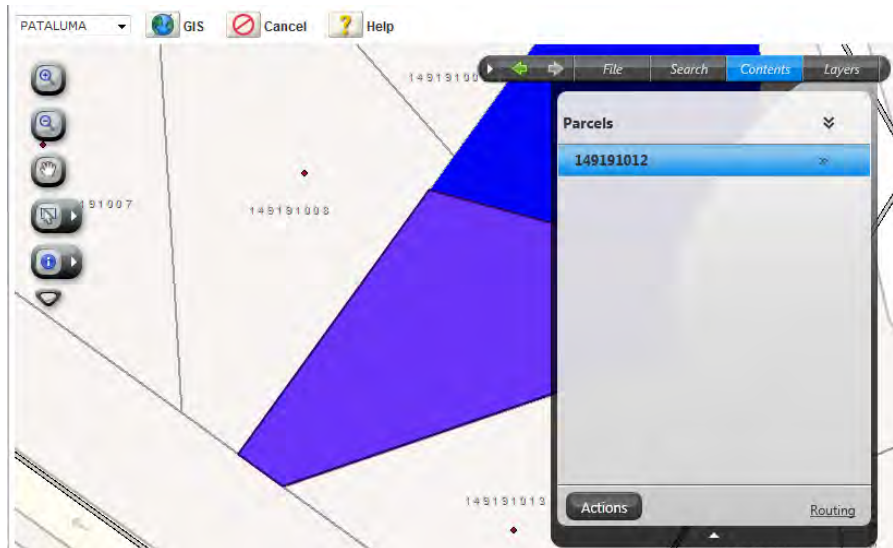
### To access attachments from a GIS map

1. Click the **Maps** button on the Toolbar.

Accela GIS displays the map viewer.

2. Search for and select an object on the map.

Accela GIS displays a map overlay or icon on the selected object. The object also displays in the Contents panel.



3. Click the **Actions** button.

Accela GIS displays the command menu.

4. Click the **Show Documents** command.

Accela GIS displays a Document window listing attachments associated with the current parcel, as well as attachments associated with the records related to the current parcel. If the current parcel was generated by splitting or merging historical parcels, the historical parcel numbers are listed in the window. You can click these parcel numbers to view the attachments associated with the historical parcels.

Document - Windows Internet Explorer

Close Help

Documents retrieved for **parcel 20120214013** which was created on 02/13/2012 by merging parcels [20120214011](#) [20120214012](#)

<u>Document Name</u>	<u>Document Group</u>	<u>Category</u>	<u>Description</u>	<u>Modified Date</u>
<a href="#">SDL_AA Terms.xlsx</a>				03/04/2012
<a href="#">BuildingPlan.pdf</a>				03/04/2012

Documents on records related to **parcel 20120214013**

<u>Document Name</u>	<u>Document Group</u>	<u>Category</u>	<u>Description</u>	<u>Modified Date</u>	<u>Record Type</u>	<u>Permit ID</u>
<a href="#">Document for 12CAP-00000476</a>			Enforcement	02/13/2012	Building/Sunny/Sunny/Sunny	12CAP-00000-000DB

## Defining ACA Permissions for a Document

Civic Platform enables you to define Citizen Access permissions at the individual document level for documents uploaded to or associated with records, licensed professionals, or reference contacts. You can define the permissions during the upload process, or you can define the permissions after a document uploads. The process described in this section shows you how you can define the permissions to documents that have already been uploaded.

### To define Citizen Access permissions for a document

1. Access the document following the steps described in [Accessing an Attachment](#).
2. Click the **ACA Permission** button. The button is either directly available in the portlet or from the **Manage Documents** command menu.

Civic Platform displays a portlet with viewable permissions for Citizen Access.

The screenshot shows a web form for defining ACA permissions. At the top are three buttons: 'Submit', 'Cancel', and 'Help'. The form is organized into three distinct sections, each separated by a horizontal dotted line. Each section has a title (e.g., 'Title Viewable in ACA'), a 'Set [Permission] Permission' label with radio buttons for 'Yes' and 'No', and a list of checkboxes for user roles: 'All ACA Users', 'Registered ACA Users', 'Record Creator', 'Licensed Professional', 'Contact', and 'Owner'. In the 'Title Viewable in ACA' section, the 'No' radio button is selected. In the 'Downloadable in ACA' section, the 'No' radio button is also selected. In the 'Deletable in ACA' section, the 'No' radio button is selected.

3. When you define ACA Permission for a record document, complete the following fields:

#### Set Title Viewable Permission

Click **Yes**, then select the public users for whom you want the attached document name to be viewable in Citizen Access. Click **No** to use existing permissions based on the document type of the attached document.



#### Note:

Users without this permission will be unable to download or delete the document, even if the downloadable and deletable permissions (described below) are granted.

#### Set Downloadable Permission

Click **Yes**, then select the public users for whom you want the attached document to be downloadable in Citizen Access. Click **No** to use existing permissions based on the document type of the attached document.

#### Set Deletable Permission

Click **Yes**, then select the public users for whom you want the attached document to be deletable in Citizen Access. Click **No** to use existing permissions based on the document type of the attached document.

The ACA Permissions for a record document define the permissions that certain public user has on the document when the public user views the record. If you set a permission to Yes, you must select at least one public user group. If you do not select any public user groups, no public users will have access to the documents, even if they have role-based permissions to view the document type.

4. When you define ACA Permission for a people document, select or deselect the check boxes next to Title Viewable in ACA, Downloadable in ACA , and Deleteable in ACA.

The ACA Permissions for a people document define the permissions that a public user has on the document after the public user account is associated with the contact or licensed professional.

5. Click **Submit**.



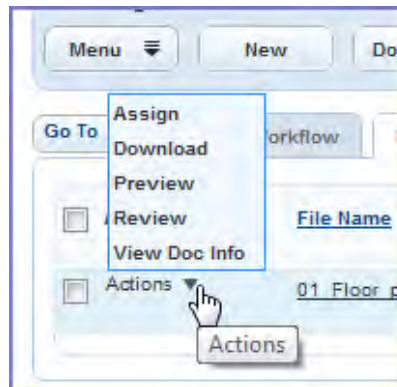
## Previewing Attachments

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When you want to look at an attachment but do not need to modify it (see [Using Electronic Document Review](#) for more about modifying attachments), use the Preview command.

### To preview an attachment

1. Navigate to the record list portlet you are using and use Search to locate the record you want to work with.
2. Click the link to the record you want.
3. Click the Documents tab.
4. Click the File Name link for the attachment you want to view.
5. To download the file, open the Actions menu for the desired attachment by clicking the down arrow, and select **Preview**.



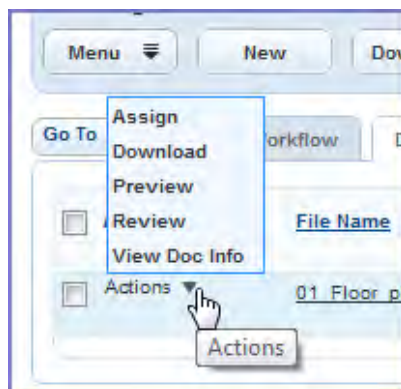
## Downloading Attachments

You can download record attachments to your computer as needed. Keep in mind that once a file is downloaded, that copy of the file is no longer linked to the application server. You cannot use document review functionality, and you cannot save changes to the server.

If you make changes to a downloaded file and you want to reattach the file to the record in Civic Platform, you can do so. See [Attaching Files](#) for more information.

### To download an attachment

1. Navigate to the record list portlet you are using and use Search to locate the record you want to work with.
2. Click the link to the record you want.
3. Click the Documents tab.
4. Click the File Name link for the attachment you want to view.
5. To download the file, open the Actions menu for the desired attachment by clicking the down arrow, and select **Download**.



Civic Platform displays the attachment in a new window.

6. To download multiple documents, choose the documents and click **Manage Documents > Download**. Note that the Civic Platform administrator must grant Upload and Download permission on the Administration > Agency Profile > Security Policy > EDMS Access Security > {EDMS-Name} to enable multiple document downloads.

To print multiple documents, choose the documents and click **Manage Documents > Print**. Note that the **Print** option only shows if the Civic Platform administrator has configured FID 8508 Print Multiple Documents with Full Access.

## Setting the Display Image

Civic Platform provides you with the ability to assign a graphical representation to a record, similar to a logo. You choose from the list of uploaded photo attachments on the record and set one as the display image. After the display image is assigned to the record, it displays on the Record detail screen as shown in [Display Image on the Record Detail Page](#). You can modify the display image at anytime by clearing the old display image and assigning a new one.



### Note:

Not all file types can be used as a display image. You will receive an error message during the set display image process if you select an attachment in a file format that is not configured for display images. Contact your agency administrator for a list of compatible file format types, such as JPG.

The screenshot shows the Record Detail Page for a permit record. The record ID is 13CAP-00000-0005H. The display image is a circular photo of a fish. The page includes various fields for permit details, such as Permit Type (Building/COA/AGIS/AGIS), Priority, Opened Date (01/29/2016), Assigned to Staff (Barbara C. Graham), and Completed by Staff (Current User). There are also tabs for Summary, Permit, Addtl Info, Education (2), Activities (1), Activity Summary (2), Address (2), GIS (0), ASI, ASI Tables (0), Status Hist (4), Assess Fee History (10), and Assets.

Figure 17: Display Image on the Record Detail Page

### Topics

- [Adding a Display Image](#)
- [Removing a Display Image](#)

### Adding a Display Image

You can search and select a photo and set it as a display image for a record. For example, you may want to assign a photo of a fish for a fishing license record. After the photo is uploaded to Civic Platform and assigned to the record, it displays in the Record Detail page. See [Display Image on the Record Detail Page](#). This section provides instructions on how to add a display image to a record. If you want to remove or change the display image, see [Removing a Display Image](#).

#### To add a display image

1. Select a record and click the Documents tab.  
Civic Platform displays the documents list portlet.
2. Choose one of the following:
  - Add an image attachment to the record. For instructions, see [Attaching Files](#).
  - Choose an existing image from the document list portlet.

3. Select the attachment you want to set as the display image.

4. Click the **Set Display Image** button.

The image file is set as the display image for the current record. Accela Civic Platform displays a Y in the Display Image column.

The screenshot shows the 'Record' page for record ID WO-13-00025. The record details table shows the following information:

Work Order	Work Order Type	Status	Opened	Assigned to Staff	Description
No					
<input checked="" type="checkbox"/>	WO-13-00025	AMS/Facility/HVAC/PM	01/23/2013		A graffiti on the wall

Below the record details, the 'Record ID: WO-13-00025' section includes buttons for 'Set Display Image' and 'Clear Display Image'. The 'Attachments' table shows the following information:

File Name	Category	Description	Size	Type	Entity Type	Display Image	Modified Date
<input type="checkbox"/>	Accela.jpg	Document	62.06 KB	image/jpeg	Record	Y	01/24/2013

## Removing a Display Image

You can change or remove the display image for a record at anytime. This is done by choosing the existing display image and clicking the Clear Display Image button. Replace the display image by adding a new one. For instructions on how to add a display image, see [Adding a Display Image](#).

### To remove a display image

1. Select a record and click the Documents tab.  
Civic Platform displays the documents portlet.

2. Select the current display image, which is the attachment with Y in the Display Image column.

3. Click **Clear Display Image**.

Civic Platform displays N in the Display Image column, indicating the display image was removed from the current record.

The screenshot shows the 'Record' page for record ID WO-13-00025. The record details table shows the following information:

Work Order	Work Order Type	Status	Opened	Assigned to Staff	Description	Number
No						
<input checked="" type="checkbox"/>	WO-13-00025	AMS/Facility/HVAC/PM	01/23/2013		A graffiti on the wall	

Below the record details, the 'Record ID: WO-13-00025' section includes buttons for 'Clear Display Image' and 'Set Display Image'. The 'Attachments' table shows the following information:

File Name	Category	Description	Size	Type	Entity Type	Inspection	Modified Date	Display Image	Record Type Alias
<input type="checkbox"/>	Accela.jpg	Document	62.06 KB	image/jpeg	Record		01/24/2013	N	

## Viewing Attachment Information

After an attachment has been associated with a record, you can access details regarding how it was added and if it has been modified. To view this information as well as other details about the attachment, users click the Info button in the document list portlet.

### To view attachment information

1. Select a record and click the Documents tab.  
Civic Platform displays the documents portlet.
2. Identify the document you want to view/edit and mark the check box.
3. Either click the **Info** button in the toolbar, or select **View Doc Info** from the **Action** menu for the desired document.

The Document Information window displays.

The screenshot shows a 'Document Information' window with the following details:

File Name	Category	Description
sampleplan_electrical.pdf	Site Plans	
<b>Size</b> 257.05 KB	<b>Type</b> application/pdf	<b>Modified By</b> Administrator J TEST1
<b>Source</b> Accela	<b>Department</b> TEST1/PETALUMA/REDEV/REDEV/NA/NA/CITYHALL	<b>Document Status</b> Uploaded
<b>ACA Permissions</b> Follow Document Type Security	<b>Uploaded On</b> 02/12/2012	<b>Uploaded By</b> Administrator J TEST1
<b>Virtual Folders</b> [Empty field]	<b>Document Status Date</b> 02/12/2012	

**BUILD\_DOCS**

Framing       Electrical       Mechanical

Plumbing

The window also includes a left sidebar with 'Download' and 'Review' buttons, and a top toolbar with 'Menu', 'Save', 'View Log', and 'Help' buttons.

## Deleting an Attachment

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When an attachment is no longer needed, you can delete it from Civic Platform. After you delete an attachment, you cannot recover it.

### To delete an attachment

1. Select a record and click the Documents tab.  
Civic Platform displays the documents portlet.
2. Select the attachment you want to delete.
3. Click the **Delete** button.  
Civic Platform displays a pop-up window that directs you to confirm the deletion.
4. Click the **Yes** button.  
Civic Platform deletes the file.

## Working with Accela Document Scan

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Accela Document Scan gives users the ability to initiate a scan of a document from Civic Platform, and then attach the scanned document file to the current record.

**Use Case:** A citizen applies for a hunting license in person. He brings in a hard copy of the certificate that he received for taking a gun safety course, which is a requirement for a hunting license. The clerk launches a hunting application record in Civic Platform. When the agency clerk creates the application record, she navigates to the Documents tab of the application and clicks **New from Scan**. The clerk inputs the required information about the document and places the document in the scanner. The clerk initiates the scan process from Civic Platform, which provides the requisite scanner controls to interact with the scanner. When the scan completes, the scanned document file appears on the screen. The clerk can preview it before he saves the file to the application record.

Users can initiate the document scanning functionality from the Documents tab on the following portlets: Record, Parcel, License Professional, and Meeting.

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**Note:**

You must install Accela Document Scan on each workstation where users plan to use a scanner to incorporate documents into Civic Platform. See the *Civic Platform Installation Guide*, available via the [Documentation Library on Community](#) and on the FTP site.

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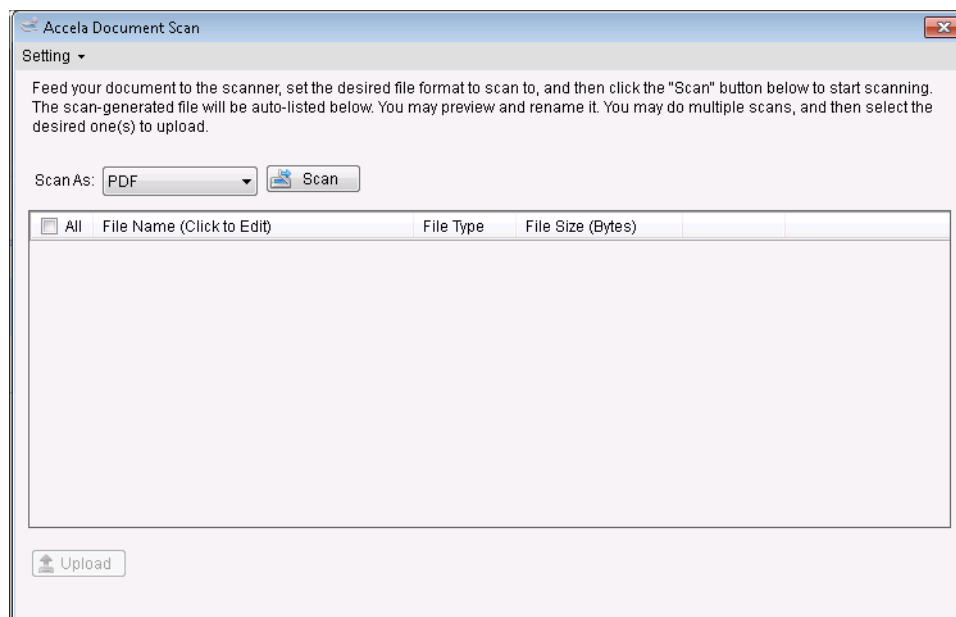
### Topics

- [Scanning a Document](#)
- [Switching Scanners](#)

### Scanning a Document

#### To scan a document

1. Navigate to the Documents tab on the portlet where you want to attach a scanned document.
2. Click **New from Scan**.  
A new document form displays.
3. Complete the fields on the form with available data, then click **Continue**.  
A file download prompt displays.
4. Click **Open**.  
The Accela Document Scan window displays. Instructions for setting up the scanner may display at the top of the window.



- Place your document on the scanner per manufacturer instructions, then pick a **Scan As** value; for example, PDF or TIF.

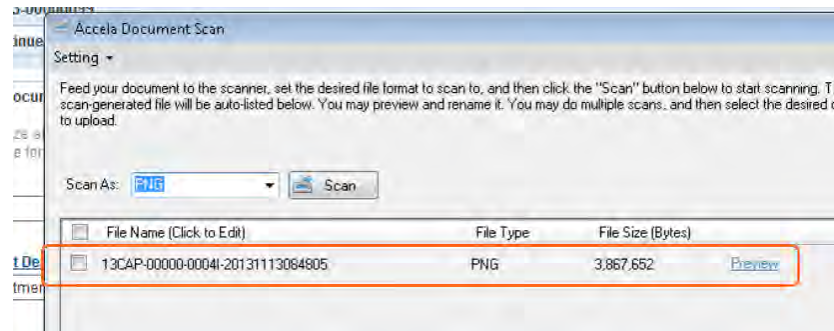


**Note:**

If you are scanning a multi-page document to a single, multi-page file, you must choose PDF for the **Scan As** value.

- Click **Scan**.

When the scan is complete, the scanned document file appears in the File Name list on the Accela Document Scan window.



- Click **Preview** to view the scanned document file.
- If you want to change the name of the file, click the file name and enter a new name. Do not worry about a filename extension.



**Note:**

By default, scanned document file names use this format:

- Record attachments: record number + time/date sequence
- Parcel attachments: parcel number + time/date sequence
- Licensed professional or meeting attachments: unique ID stored in the database + time/date sequence



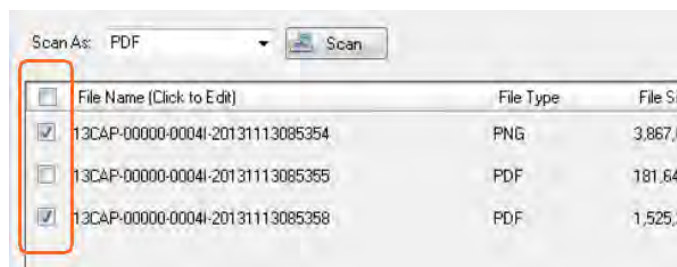
9. If you have more documents to scan or if you need to re-scan any document, repeat steps 4-7. If you need to switch scanners (For example, your agency may have one scanner to handle single page documents, and another scanner to handle multi-page documents), see [Switching Scanners](#) for information about switching to another scanner.



**Note:**

If you are scanning multiple documents, you can adjust document settings such as Document Group and Citizen Access Permissions after you upload your scanned documents.

10. When you finish scanning documents, select the document files you want to upload to Civic Platform. You can select all files by marking the check box in the title bar (next to File Name).



11. Click **Upload**.

Selected document files upload to Civic Platform. When done, Accela Document Scan removes uploaded files from the queue.

12. Click **Setting** in the upper left corner, then select **Exit**.

The Accela Document Scan window closes, and you return to the Civic Platform document form (see illustration in step 2).

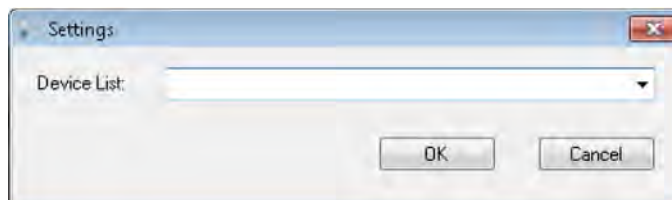
13. To scan more documents, follow steps 3-11. Otherwise, click **Back** to return to the Document list tab. Your new document scan files display in the list.

## Switching Scanners

If you are scanning more than one document and you need to use a different scanner; for example, one that supports multi-page documents, Accela Document Scan enables you to make the switch from within the Accela Document Scan window.

### To switch to a different scanner

- Follow steps 1-3 in [Scanning a Document](#) to display the Accela Document Scan window.
- Click **Setting** in the upper left corner.
- Choose **Select Scanner** from the command menu. A device list dialog displays.



- Choose the scanner you want to use from the **Device List** drop-down list.
- Click **OK**.

## Examining Attachment Details

The following table lists and defines fields that may be available as you work with attachments.

Table 18: Attachment Fields

<b>ACA Permission</b>	Displays the access permissions to the file for the selected ACA user groups. By default, permission control on the document is inherited from the document type that the document belongs to in Civic Platform Classic.
<b>Alternate ID</b>	This read-only field displays the Alternate ID of the record that the document is uploaded to.
<b>Department</b>	This is the department that is responsible for reviewing the document or who currently is in possession of it.
<b>Display Image</b>	This is a display image, or icon, you can apply to a document. See <a href="#">Setting the Display Image</a> .
<b>Document Description</b>	A brief description of the document.
<b>Document Group/Category</b>	This is the document group and category for the file. When selecting a document group, the category field drop-down list changes to provide list items for the selected document group.
<b>Document Name</b>	This is the title for the document.
<b>Document Status</b>	This read-only field displays the status of the document.
<b>Document Status Date</b>	This read-only field displays the date the document status was last updated.
<b>EDMS Name</b>	The name of your agency's electronic document management system. Note that this field may have either of these labels, depending upon your agency's configuration.
<b>Entity Type</b>	This read-only field displays the original entity to which the document is uploaded; for example, record, inspection, or professional.
<b>Entity</b>	This read-only field displays the entity type (Record Type Alias or Record Type, Inspection Type, or License Type) plus the entity ID (Alt ID, Inspection ID, or State License #) to which the document is uploaded.
<b>File Name</b>	This read-only field shows name of the file as it displays in the source location.
<b>Inspection</b>	This read-only field displays the inspection type if the document is attached to an inspection.
<b>Modified By</b>	This read-only field shows the user account that last modified the document.
<b>Modified Date</b>	This read-only field shows when the document was last updated in the record.
<b>Record Type Alias</b>	This read-only field displays the record type alias, if any, of the record that the document is uploaded to.
<b>Size</b>	This read-only field shows the file size of the document.
<b>Type</b>	This read-only field displays the file format of the document; for example, image/JPEG or PDF.
<b>Uploaded By</b>	This read-only field shows when the document was uploaded to the record.
<b>User Email</b>	One or multiple email addresses that you want associated with the attachment. Separate multiple addresses by a comma.
<b>Virtual Folders</b>	A virtual folder for storing the attachment. With virtual folders, you can organize uploaded attachments in groups, enabling you to better track attachments.

# Audit Logs

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Choose a topic from the list below to learn more about working with audit logs.

**Related Information**

[Accessing Audit Logs](#)

[Available Audit Logs](#)

[Filtering Audit Log Data](#)

[Audit Log Buttons and Filter Options](#)

[Receipt Print Audit](#)

## Audit Logs Overview

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Agencies can enable audit log functionality for many different portlets that users work with every day. Audit logs give you the ability to review historical data for records. For example, when a user creates a new record, Civic Platform records the first entry in each field for the audit log. Essentially, Civic Platform records any action to add, update, or delete data from a record for the audit log.

No matter where you access an audit log in Civic Platform, you interact with the logs in the same way. Though the data you view may differ, the command buttons and filtering process are consistent from log to log, with some minor variation to filtering options for certain audit log types. For more information about the different audit logs, see [Available Audit Logs](#)

## Accessing Audit Logs

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Use the **View Log** button in the toolbar to access audit logs throughout Civic Platform. If the **View Log** button appears in a detail portlet, you access the audit log for the current record only. If the **View Log** button is in a list portlet, you access an audit log for all records of that type.

In most cases, you simply click the **View Log** button to open the audit log. On some portlets, however, multiple audit logs may be accessible. In these instances, the **View Log** button becomes a menu of available logs from which you can choose.

### To access an audit log

1. Navigate to the list or detail portlet from which you want to access an audit log.  
See [Available Audit Logs](#) for a list of audit logs and how you can launch them.




#### Note:

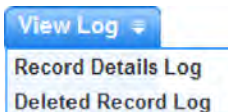
You can launch several audit logs from more than one portlet. Keep this in mind as you choose a portlet from which to launch: if you launch an audit log from a detail portlet, it contains historical data for the current record only. If you launch the audit log from a list portlet, you have access to historical data for all records of the same type.

2. Do one of the following:

- If **View Log** is a standard button (see image below), click the button.



- If **View Log** is a drop-down button (see image below), hover the mouse cursor on the **View Log** button to display a list of available audit logs. Click the name of the log you want to launch.



3. Specify an audit type, if options are available.
4. Apply filter options as needed to display the data you want to see. See [Filtering Audit Log Data](#) for more information.  
Audit log data displays as defined by your filter.

### Available Audit Logs

The following table lists the audit logs/audit log types that are available in Civic Platform, along with information about where to access the listed audit log and any notable features.



#### Note:

Many agencies restrict access to audit logs. If you do not see a View Log button where you expect to see one, consult your system administrator to confirm your level of access.

---

Table 19: Available Audit Log/Audit Log Types

Audit Log/Audit Log Type	Where to access	Notes
<b>App Specific Info Audit Log</b>	Record list portlet > View Log > Record Details Log > App Specific Info audit type  Record detail portlet > Record tab > View Log > App Specific Info audit type	An additional filter option, Subgroup, is available for this log.
<b>App Specific Info Tables Audit Log</b>	Record list portlet > View Log > Record Details Log > App Specific Info Tables audit type  Record detail portlet > Record tab > View Log > App Specific Info Tables audit type	An additional filter option, Subgroup, is available for this log.
<b>Asset Audit Log</b>	Asset list portlet > View Log button	Two additional filter options, Condition Group and Condition Type, are available for this log.
<b>Condition Audit Log</b>	Record list portlet > View Log > Record Details Log > Record Condition audit type  Record detail portlet > Record tab > View Log > Record Condition audit type  Record detail portlet > Conditions tab > View Log Record detail portlet > Conditions of Approval tab > View Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
<b>Contact Audit Log</b>	Reference Contacts list portlet > View Log > Contact Log > Contact audit type  Record details portlet > Contacts tab > View Log > Contact audit type	An additional filter option, ALT ID, is available for the record-specific contact audit log (Record details portlet > Contacts tab). The Field and Value filter options are not available for this log.
<b>Contact Address Audit Log</b>	Reference Contacts list portlet > View Log > Contact Log > Contact Address audit type	The Field and Value filter options are not available for this log.
<b>Contact Also Known As Audit Log</b>	Reference Contacts list portlet > View Log > Contact Log > Contact Also Known As audit type	The Field and Value filter options are not available for this log.
<b>Contact Condition Log</b>	Reference Contacts list portlet > View Log > Contact Condition Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
<b>Contact Merge Log</b> - A merge action is logged as one entry in the audit log. That entry provides source contact IDs and target contact IDs that you can use to access the contact details and contact associations before and after the merge.	Reference Contacts list portlet > View Log > Contact Log > Contact Merge audit type	The Field and Value filter options are not available for this log.

Audit Log/Audit Log Type	Where to access	Notes
<b>Contact Relationship Audit Log</b>	Reference Contacts list portlet > View Log > Contact Log > Contact Relationship audit type	The Field and Value filter options are not available for this log.
<b>Deleted Record Log</b> - Use this audit log to view a list of deleted records.	Record list portlet > View Log > Deleted Record Log	Log Date is the only filter option.
<b>Document Audit Log</b>	Record list portlet > View Log > Record Details log > Document audit type. Record detail portlet > Documents tab > View Log	Three additional filter options, Document group, Document Type, and Action Type, are available for this log.
<b>Examination Audit Log</b>	Record detail portlet > Examination tab > View Log	
<b>Inspection Audit Log</b> - Use this audit log to view historical inspection data.	Inspection list portlet > View Log > Inspection Log Record detail portlet > Inspection tab > View Log > Inspection Log	Log Date is the only filter option.
<b>Checklist Audit Log</b> - Use this audit log to view historical checklist data.	Inspection list portlet > View Log > Checklist Log Record detail portlet > Inspection tab > View Log > Checklist Log Record list portlet > View Log > Record Details Log > Checklist audit type Record detail portlet > Record tab > View Log > Checklist audit type	An additional filter option, Checklist, is available for this log.
<b>Licensed Professional Condition Audit Log</b>	Licensed Professionals list portlet > View Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
<b>Record Status History Audit Log</b>	Record detail portlet > Application History tab > View Log button	The only filter option available for this audit log is Log Date.
<b>Record Details Log</b>	Record list portlet > View Log > Record Details Log > Record audit type Record detail portlet > Record tab > View Log > Record audit type	n/a
<b>Workflow History Audit Log</b> - Use this audit log to view the workflows deleted by the Delete & Assign Workflow action.	Record detail portlet > Workflow History tab > View Log > Deleted Workflow audit type	The Field and Value filter options are not available for this log.
<b>Workflow Task Audit Log</b> - Use this audit log to view the workflow tasks deleted from the Workflow History tab, or updated in the tab (the log records the task status before the update.).	Record detail portlet > Workflow History tab > View Log > Deleted Workflow Task audit type	The Field and Value filter options are not available for this log. When you delete multiple workflow history entries in a batch, they are logged as multiple deleted history workflow tasks and sub-tasks by the same operator at the same time in the audit log.

Audit Log/Audit Log Type	Where to access	Notes
<p><b>Workflow Change Audit Log</b> - Use this audit log to view the following logs: New ad hoc task action, task activation, and supervisor changes in the Workflow tab of the Record portlet.</p>	<p>Record detail portlet &gt; Workflow History tab &gt; View Log &gt; Workflow Change audit type</p>	<p>The Field and Value filter options are not available for this log.</p>
<p><b>Workflow Task Assignment Audit Log</b> - Use this audit log to view the following logs: Task assignment, task release, and task claim in the Workflow tab of the Record portlet, and the Workflow Tasks tab of the My Tasks portlet- Task assignment in the Assign Task administration portlet</p>	<p>Record detail portlet &gt; Workflow History tab &gt; View Log &gt; Workflow Task Assignment audit type</p>	<p>The Field and Value filter options are not available for this log.</p>



## Filtering Audit Log Data

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You can use the filter functionality in the audit log to display only the data that interests you. Most audit logs in Accela Civic Platform present you with the same filter options. A few offer additional filter options. See [Available Audit Logs](#) for a list of audit logs. If additional filter options are available for an audit log, Civic Platform lists the additional filters in the Notes column.

### To filter audit log data

1. Access the audit log you want to work in. See [Accessing Audit Logs](#) for more information.  
The audit log window displays.
2. If the Audit Type filter is available, select an audit type from the drop-down list.
3. Use the additional filter fields to further define which historical data you want to view. See [Audit Log Buttons and Filter Options](#) for a list of filter options and filter definitions.
4. Click **Filter**.  
Civic Platform updates the data record list to reflect your filter settings.



#### **Note:**

To restore the original view, clear the filter fields and click the Filter button again. You can also close and re-open the audit log window.

---

## Audit Log Buttons and Filter Options

The following table lists the filters and options on the Log Detail.

Table 20: Log Detail Filters and Options

<b>ALT ID</b>	Some entities, such as parcels, have alternate ID numbers. You can use this field to filter by alternate ID number. This filter is available for the Contact audit log launched from the Contacts tab on the record detail portlet, and both the workflow history and workflow task history audit logs.
<b>Action Type</b>	Select a value from the Action drop-down list to display audit log records associated with the selected action type. This filter is available for the Document audit log only.
<b>Audit Type</b>	Select the audit type you want to view. Which types are available varies, depending on where you launched the audit log window. See <a href="#">Available Audit Logs</a> for a list of audit logs and associated audit types.
<b>Condition Group</b>	Select a condition group from the drop-down list to display data for the conditions in the selected group only. This filter is available for the following logs: Record Condition Log, Contact Condition Log, and Asset Condition Log.
<b>Condition Type</b>	Select a condition type from the drop-down list to display data for conditions of the selected type only. This filter is available for the following logs: Record Condition Log, Contact Condition Log, and Asset Condition Log.
<b>Document Group</b>	Select a document group from the drop-down list to display data for documents in the selected group only. This filter is available for the Document audit log only.
<b>Document Type</b>	Select a document type from the drop-down list to display data for documents of a selected type only. This filter is available for the Document audit log only.
<b>Entity ID</b>	Every entity, or record, has a unique ID number. If known, enter the ID number of a desired record. If you open an audit log from a detail portlet, this field auto-populates with the ID for the current entity.
<b>Field</b>	This filter field pairs with the Value filter. First, specify a modified field in the Field filter, then enter a valid field value in the Value field to filter the audit log display by that field value.
<b>Filter button</b>	Click this button on the far right side of the Audit Log window to engage the filter settings you specified. If you do not see the button, scroll to the right or make the window larger.
<b>Checklist</b>	Select a checklist from the drop-down list to display data for selected checklist type only. This filter is available for the Checklist audit type only.
<b>Log Date/Time</b>	Enter a date range to filter audit log entries by log entry creation date. If you enter a date in the left field only, Civic Platform assumes you want records for all dates following the entered date. Similarly, if you enter a date in the right field only, Civic Platform assumes you want to view records for all dates prior to the entered date.
<b>Operator</b>	This filter field enables you to filter by user name, and then display a list of actions by a particular user. Click the Select User button to the right of the Operator field to display and select from a list of users sorted by department and by user group.
<b>Subgroup</b>	Select a subgroup from the drop-down list to display only the selected ASI or ASI table data for which fields were modified. This filter drop-down list is available for the App Specific Info or App Specific Info Tables audit logs.
<b>Value</b>	This filter field pairs with the Field filter. First, specify a field in the Field filter, then enter a valid field value in the Value field to filter the audit log display by that field value.

## Receipt Print Audit

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This portlet enables users to track receipt printing. It displays details about who has printed a receipt via Record > Payment > Receipt > Print Receipt.

# Calendars

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Choose a topic from the list below to learn more about working with calendars.

## **Related Information**

[Understanding Calendars](#)

[Working with Inspection Calendars](#)

[Working with Meeting Calendars](#)

[Working with User Calendars](#)

[Examining Calendar \(and Related\) Details](#)

## Understanding Calendars

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Civic Platform provides four different calendar types; inspection, meeting, agency holiday, and user. After your agency administrator configures a calendar, you can manage calendar details and complete related tasks such as scheduling inspections, reserving meeting centers, and updating meeting agendas.

- Use inspection calendars to schedule, reschedule, cancel, and request inspections. You can accommodate any inspection type on an application, including the inspection group that Civic Platform associates with the application and the inspection types from different inspection groups. This way, you can schedule any special circumstance inspections after an application submittal.
- Use agency holiday calendars and to block out holidays and prevent users from scheduling inspections or meetings on those days.
- Use user calendars to show your availability to others for scheduling inspections or meetings.
- Use meeting calendars to manage meeting logistics. Access meeting calendars to review and update meeting details, including the meeting agenda, location, contacts, and results.

### Topics

- [Understanding the Calendar Portlet](#)
- [Viewing the Master Calendar](#)

### Understanding the Calendar Portlet

The Calendar portlet consists of three main parts:

**Navigation tree portlet** - Use this portlet to search calendars by type, name, user group, inspection type, district, and department. Civic Platform filters calendars by parent categories such as Calendar by Type, Calendar by Name, or Calendar by User Group. Move through the tree and click the plus (+) or minus (-) sign next to parent categories to find calendars.

**Calendar List portlet** - After you select a calendar in the navigation tree portlet, the results display in this portlet. Civic Platform sorts calendar data into primary tabs that you can click when you want to view a particular set of data. For example, if you want to view all the inspections associated with a specific calendar, select an inspection calendar from the Calendar Navigation Tree and click the Inspections primary tab. The primary tabs available vary depending on the type of calendar that you select; however, all calendar types offer a Daily, Weekly, and Monthly primary tab view.

**Calendar Detail portlet** - When you select a calendar item in the List portlet, information related to the selected calendar displays in this portlet. The tabs and buttons available for you to use vary by calendar type. The Calendar Detail portlet provides secondary tabs where you can review and modify calendar information. The secondary tabs might vary, depending on the type of calendar that you select. The tabs can include inspection details, event details, associated applications, checklist information, attached documents, or condition information.

### Viewing the Master Calendar

Civic Platform provides a master calendar where all calendars and associated items appear in one place. You can view master calendar items in a daily, weekly, or monthly view.

#### To view the master calendar

1. Navigate to the Calendar portlet.  
Civic Platform displays the Calendar navigation tree.
2. Choose a calendar in the Calendar navigation tree.

Civic Platform displays the calendar information in the calendar list portlet.

- To see the master calendar by month, click the Monthly tab.

To see daily or weekly master calendar items, use the date picker to select the desired date(s) for which you want to see calendar items, then choose **All Calendars** from the **Show** drop-down list.

Civic Platform displays the master calendar.

Calendar Name: ACA\_DEFAULT\_INSPECTION\_CALENDAR

Schedule
Inspections
Daily
Weekly
Monthly

January ▾ 2013 ▾ Show All Calendars ▾ Next Month >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4 <small>02:01 PM-05:01 PM 10 <a href="#">Bldg-Foundation Forms</a></small>	5
6	7	8	9	10	11	12
13	14	15	16	17 <small>10 Bldg-Foundation Forms</small>	18	19
20	21 <small>19 Bldg-Frame</small>	22	23	24	25 (Today)	26
27	28	29	30	31		

# Working with Inspection Calendars

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## Topics

- [Using Inspection Calendar Tabs](#)
- [Using the Manage Inspections Command Menu](#)
- [Scheduling an Inspection](#)
- [Rescheduling an Inspection](#)
- [Cancelling an Inspection](#)
- [Entering Inspection Results](#)
- [Deleting an Inspection](#)
- [Modifying a Scheduled, Rescheduled, or Pending Inspection](#)
- [Managing Pending Inspections](#)
- [Working with the Edit Inspection Portlet](#)

## Using Inspection Calendar Tabs

Use the primary tabs for an inspection calendar on the Calendar list portlet to view and modify calendar details. The following sections discuss the tabs that may be available.

### Topics

- [Using the Schedule Tab](#)
- [Using the Inspections Tab](#)
- [Using the Daily, Weekly, or Monthly Tab](#)

## Using the Schedule Tab

The Schedule tab displays the inspection calendar for the current date. Use the scroll bar beneath the calendar to view future days or past days. To change the weekly view, select the calendar icon next to the current date.

The inspector calendar highlights the hour block during which an inspection is to occur. For example, if an inspection is to happen at 9:15 am, then Civic Platform highlights the 9:00 am -10:00 am hour block. When you select an inspection from the inspector workload calendar, then the inspection detail displays in the Edit Inspection portlet. You can edit inspection detail, checklists, and conditions in the Edit Inspection portlet. For more information, see [Viewing the Edit Inspection Portlet](#).



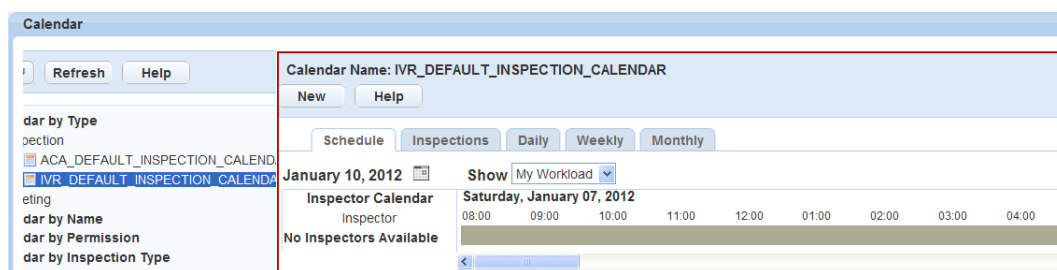
### Note:

Only inspectors with assigned inspections display on the inspector calendar.

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## To view the Schedule tab

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.



2. Select the Schedule tab (if not currently displayed).
3. Select a value from the **Show** drop-down list. Options may include the following:

- All Inspectors** All the inspectors display on the inspection calendar.
- My Team** If you are a supervisor, this view displays the inspection calendar for inspectors assigned to your calendar.
- My Workload** This selection allows you to view your personal inspection calendar.

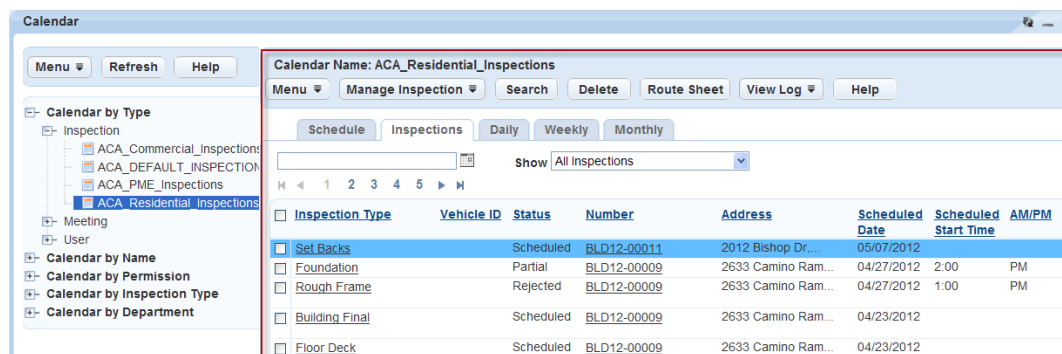
Civic Platform displays data based on what you select in the Show field.

## Using the Inspections Tab

The Inspections tab displays scheduled inspections associated with the selected calendar. You can filter inspection data by using the Show drop-down list. You can edit inspection details, checklists, and conditions in the Edit Inspection portlet after Civic Platform displays them. For more information about the Edit Inspection portlet, see [Viewing the Edit Inspection Portlet](#).

### To view the Inspections tab

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Click the Inspections tab.  
Civic Platform lists inspections by scheduled date.



3. Select a value from the **Show** drop-down list to filter the display. Options may include the following.

- All Inspections** All inspections for the selected calendar display.
- My Inspections** Inspections assigned to the current user display.
- My Team Inspections** If you are a supervisor, you can view all the inspections for inspectors assigned to your calendar.
- Pending Inspections** Inspections with pending status or inspections with no inspector assignment from Civic Platform and Citizen Access.



<b>Requested Pending Inspections</b>	Filters the inspection list to show online inspections requested by public users. These inspections require an inspector and appointment time assigned.
<b>Scheduled Inspections</b>	Inspections with scheduled status.

## Using the Daily, Weekly, or Monthly Tab

The Daily tab displays inspections scheduled for the current day.

The Weekly tab provides a weekly view of scheduled inspections and time blocks.

The Monthly tab provides a monthly view of scheduled inspections and time blocks.

You can filter the list of inspections on either the Weekly or the Monthly tab using the Show drop-down list.

### To view the daily or weekly inspection calendar

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Click the Daily, Weekly, or Monthly tab, depending on what you want to view.  
Civic Platform displays the selected inspection calendar view.
3. Filter the inspection list by using the **Show** drop-down list. Options may include the following:

<b>Current Inspections for this Calendar</b>	Current inspections associated with the selected calendar.
<b>Current Inspections for all Calendars</b>	Inspections associated with all inspection calendars.
<b>This Calendar Only</b>	All inspections associated with the selected calendar.
<b>All Calendars</b>	Inspections associated with all inspection calendars.
<b>Supervisor Inspections for this Calendar</b>	Supervisors can view their assigned inspections for the selected calendar.
<b>Supervisor Inspections for all Calendars</b>	Supervisors can view their assigned inspections for all calendars.
<b>Supervisor Unassigned Inspections</b>	Supervisors can view all their unassigned inspections for the selected calendar.
<b>Unassigned Inspections for this Calendar</b>	Inspections associated with the selected calendar that Civic Platform has not assigned to an inspector.
<b>Unassigned Inspections for all Calendars</b>	Inspections associated with inspection calendars that Civic Platform has not assigned to an inspector.
<b>Supervisor Master Calendar</b>	The supervisor's master calendar established in the Calendar Administration portlet.

Civic Platform displays the inspections that reflect the selected value.

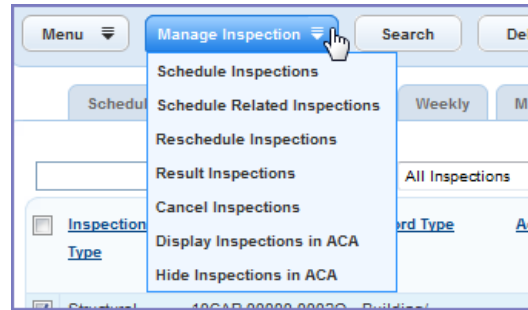
## Using the Manage Inspections Command Menu

The Manage Inspections menu on the Inspections tab provides you with a list of actions that you can perform on one or more inspections.

### To access the Manage Inspections Menu

1. Navigate to the Calendar portlet and choose the calendar you want to view.
2. Click the Inspections tab.  
Civic Platform displays the Calendar Inspection list portlet.
3. Hover your mouse cursor over the **Manage Inspection** button in the toolbar.

The Manage Inspection menu displays.



4. Click any option in the menu to select it.

## Scheduling an Inspection

When you schedule an inspection, you define the type of inspection, who the inspector is, and the date and time that the inspection is to occur. You can also define the scheduling order if you are scheduling multiple inspections for the same inspector. For example, a building permit application might require exterior inspections and interior inspections, as well as a final inspection. You can define the order in which these inspections proceed.

Civic Platform maximizes inspector schedules by allowing you to set inspections that automatically account for block out times on an inspector's calendar. For example, Kate, an electrical inspector, is available to be scheduled for inspections from 8:00 AM to 5:00 PM. She has a blockout period for lunch from 12:00 PM to 1:00 PM. You can schedule a two hour inspection on her calendar that begins at 11:00 AM and ends at 2:00 PM. The inspection occupies the calendar time from 11:00 AM to 12:00 PM and the time from 1:00 PM to 2:00 PM, while preserving Kate's block out lunch period from 12:00 to 1:00 PM.

You can select an inspection from the Inspection List portlet. You can also create and schedule a new inspection by selecting **Schedule Inspections**.

Some agencies use an inspection flow or inspection milestone functionality. You can only schedule such inspections in the sequence that the inspection flow or the milestone order defines.



### Note:

If Civic Platform associates an inspection type with an application, and the inspection that precedes it in the inspection flow (or milestone process) is unscheduled, then the inspection type is grayed out. You cannot schedule it until you schedule the preceding inspection.

Your agency administrator can configure Civic Platform so supervisors can schedule any inspection at any time, regardless of the defined order within an inspection flow or a milestone process.

### To schedule a new inspection

1. On the Inspections tab for the calendar you are working on, hover over the **Manage Inspection** button, then select **Schedule Inspections** from the menu.  
Civic Platform displays the Search Record for Pending Inspections portlet.
2. Either enter the application number for which you want to schedule inspections or leave the field blank, then click the **Search** button.  
If you left the field blank before searching, a search form displays. If you entered a valid application number, skip the next step.
3. Enter search criteria as appropriate and click **Submit**. Select the record you want and click **Submit** again.  
Civic Platform displays a form you can use to select the inspection(s) you want to schedule.

4. From the Inspection Group drop-down list, select the inspection group containing the inspection types you want to schedule.  
Civic Platform displays the inspection types in the Available Inspection Types box.
5. Use the arrow controls between the Available Inspection Types box and the Selected Inspection Types box to select the inspection type(s) you want to schedule. The types displayed in the box to the right are selected.
6. To schedule an inspection, click **Schedule Inspections**, then complete the fields on the Schedule Inspections form. See [Schedule Inspections Fields](#) for field definitions.  
To request an inspection, click **Pending Inspections** (below the Available Inspection Types box), then click **OK**.
7. Click **Submit**.  
Civic Platform displays a confirmation message indicating it has scheduled the inspection.

## Rescheduling an Inspection

You can reschedule both scheduled and pending inspections as needed to accommodate inspector schedules and inspector workloads.



### Note:

Some agencies configure Civic Platform to create a new inspection record instead of updating the original inspection record when you reschedule an inspection. Contact your agency administrator to discuss how your agency handles rescheduling.

### To reschedule an inspection

1. On the Inspections tab for the calendar you are working on, select the inspection(s) you want to reschedule.

2. Hover over the **Manage Inspection** button, then select **Reschedule Inspections** from the menu.  
Civic Platform displays the Reschedule Inspections portlet.
3. Complete the fields in the Schedule Inspections portlet. See [Schedule Inspections Fields](#) for a list of field definitions.
4. Click **Submit**.  
Civic Platform reschedules the inspection(s).

## Canceling an Inspection

You can cancel a scheduled or pending inspection as necessary. Cancelled inspections remain in the list portlet and remain associated with the record, which enables you to reschedule the inspection at a later date. If you do not want a cancelled inspection to display in the list portlet, you can delete it. See [Deleting an Inspection](#), for more information.

### To cancel an inspection

1. On the Inspections tab for the calendar you are working on, mark the check box for each inspection you want to cancel.
2. Hover over the **Manage Inspection** button, then select **Cancel Inspections** from the menu.  
Civic Platform displays the Cancel Inspections portlet.
3. Click **Submit**.  
Civic Platform cancels the inspection(s).

## Entering Inspection Results

After an inspection is complete, you can enter the inspection results from the Inspection tab. For example, you can record “passed” if you performed an inspection of a water pipe and it met all the inspection requirements.

You can enter inspection results at any time, regardless of an inspection’s status. For example, a public user might request a mechanical inspection for a building application. Civic Platform gives this inspection request a status of Pending. Before an agency user schedules the Pending inspection, an inspector might complete the inspection.

After the inspection is complete, the inspector can enter the inspection results without first changing the inspection status. When the inspector enters the inspection results, the values entered in the Inspection Date and Inspection Time fields automatically populate the Result Date and Result Time fields.

When an inspector enters inspection results, Civic Platform updates inspector workloads accordingly. For example, Amy, a building inspector, might have eight inspection units per day. On Monday, May 17 at 3:00 PM, Civic Platform Amy to conduct an electrical inspection that requires one inspection unit. For various reasons, Amy completes the inspection earlier, at 10:00 AM, and enters the inspection results.

After Amy enters the inspection results, Civic Platform updates her daily inspector workload from eight units to seven units. Amy’s supervisor can then assign Amy to complete another inspection at 3:00 PM on Monday, May 17. Because of the automatic workload update, the inspection workflow process is smoother, because it eliminates the restrictions that determine when inspections can occur, and when inspectors can enter inspection results.

### To enter inspection results from the Calendar

1. On the Inspections tab for the calendar you are working on, mark the check box for each inspection you want to cancel.
2. Do either of the following:
  - Hover over the **Manage Inspection** button, then select **Result Inspections** from the menu.

- Hover over the **Menu** button, then select **Result** from the menu.  
Civic Platform displays the Result Inspections portlet.
3. Enter inspection results as available. See [Inspection Scheduling and Results Fields](#) for a list of fields and field definitions.
  4. Click **Submit**.  
Civic Platform updates the inspection results.

## Deleting an Inspection

You can delete an inspection from an application. When you delete an inspection, Civic Platform permanently removes the inspection record. If you want to cancel an inspection but not remove it from Civic Platform, see [Cancelling an Inspection](#).

### To delete an inspection

1. On the Inspections tab for the calendar you are working on, mark the check box for each inspection you want to cancel.
2. Click **Delete**.  
Civic Platform confirms the deletion.

## Modifying a Scheduled, Rescheduled, or Pending Inspection

You can modify inspection details for inspections with a status of scheduled, rescheduled, or pending. This way, you can accommodate any unexpected changes that affect inspection details up until the inspection occurs. For example, if an inspector scheduled to conduct a series of storm drain inspections is unexpectedly out of the office, you can reassign the scheduled inspections to another inspector or reschedule the inspections for a later date.

### To modify a scheduled, rescheduled, or pending inspection

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Click the Inspections tab.  
Civic Platform displays the Calendar Inspection list portlet.
3. Select the inspection(s) you want to schedule, reschedule, or cancel.
4. Click the **Manage Inspection** button from the toolbar and, based on the type of changes you want to make, click the **Schedule Inspections**, **Reschedule Inspections**, or **Cancel Inspections** button.  
Based on your selection, Civic Platform displays the Schedule, or Reschedule Inspections portlet.
5. Click the inspection type in the inspection list.  
Civic Platform displays the corresponding inspection details and the inspector calendar.
6. Modify the necessary inspection details. For a complete list of inspection detail fields, see [Schedule Inspections Fields](#).
7. Click **Submit**.  
Based on the changes you make, Civic Platform displays a confirmation message indicating the inspection status: scheduled or rescheduled.

## Managing Pending Inspections

Pending inspections offer a projection, for both an agency and an applicant, of the inspections that must occur before an application moves forward. When you add a pending inspection to an application that belongs to an inspection flow or inspection milestone process, Civic Platform displays an icon that indicates the status of the inspection.

If your agency uses inspection flow or inspection milestone functionality, you can only schedule pending inspections in the sequence as defined within the inspection flow or inspection milestone order. If Civic Platform associates an inspection type with an application, and the inspection that precedes it in the inspection flow (or milestone process) is unscheduled, then the inspection type is grayed out. You cannot schedule it until you schedule the preceding inspection.

Your agency administrator can configure Civic Platform so that supervisors can schedule any inspection at any time, regardless of its order within an inspection flow or a milestone process.

Accela Wireless and Citizen Access users can also request inspections. For example, a public user without inspection scheduling privileges can set up a pending inspection. After the user adds a pending inspection, Civic Platform notifies agency users with inspection scheduling privileges so that they can schedule the inspection.

You can use the Pending Inspections portlet to add inspections that are outside of the default inspection group to an application. This alternate method allows you to add and schedule any necessary special circumstance inspections after an application's initial submission.



### Note:

You can schedule, reschedule, or cancel pending inspections. When you cancel an inspection, Civic Platform removes it from the application.

---

### To assign pending inspections to an application

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Click the Inspections tab.  
Civic Platform displays the Calendar Inspection list portlet.
3. Select **Manage Inspection > Schedule Inspections**.  
Civic Platform displays the Search Record for Pending Inspections portlet.
4. Either enter the application number for which you want to request inspections or leave the field blank, then click the **Search** button.  
If you left the field blank before searching, a search form displays. If you entered a valid application number, skip the next step.
5. Enter search criteria as appropriate and click **Submit**. Select the record you want and click **Submit** again.  
Civic Platform displays the application information in the Pending Inspections portlet.
6. From the Inspection Group drop-down list, select the inspection group containing the inspection types you want to request.  
Civic Platform displays the inspection types in the Available Inspection Types box.
7. Use the arrow controls between the Available Inspection Types box and the Selected Inspection Types box to select the inspection type(s) you want to request. The types displayed in the box to the right are selected.
8. Click **Pending Inspections**.  
Civic Platform displays a message confirming that the inspection is pending.

9. Click **OK**.

Civic Platform adds the inspection to the Calendar Inspection list portlet.

## Working with the Edit Inspection Portlet

The Edit Inspection portlet includes the secondary tabs and related data that display in the Inspection Calendar Detail portlet. Access this portlet by clicking any inspection listed in the Inspection Calendar List portlet. You can use the Edit Inspection portlet and secondary tabs to update inspection information, including inspection details, checklists, conditions, and related documents.

### Topics

- [Viewing the Edit Inspection Portlet](#)
- [Copying an Inspection](#)
- [Working with Checklists](#)
- [Working with Conditions](#)
- [Working with Documents](#)

## Viewing the Edit Inspection Portlet

You can update all the fields associated with scheduling an inspection in the Edit Inspection portlet. This includes editing inspection logistics, such as the start and end times, inspector information, and the associated application. You can also indicate whether your agency can bill for time spent conducting an inspection. When inspectors charge for the time spent on an inspection, their respective agency may bill the citizen for whom they conducted the inspection, such as a contractor or a homeowner.

### To view the edit inspection portlet

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Select a view from the **Show** drop-down list.  
Civic Platform displays the inspections that correspond to the selected value.
3. Select the desired inspection.  
Civic Platform displays the inspection detail in the Edit Inspection portlet.

Inspections

Inspection Detail
Guide Sheet
Conditions (0)
Documents (0)
Related Inspections

<b>Case #</b> <a href="#">BLD12-00009</a>	<b>Inspection Type *</b> Foundation	<b>Address</b> 2633 Camino Ramon, Suite# 524 San Ramon, 94583	
<b>Request Date</b> 04/20/2012	<b>Requestor's Phone</b> 925-888-8888	<b>Unit Nbr</b>	
<b>Request Comment</b> Ilim test - foundation request comment. Scheduled Date is 4/27/210			
<b>Scheduled Date *</b> 04/27/2012	<b>Scheduled Start Time</b> 2 : 00 PM		
<b>Inspection Date</b> 04/27/2012	<b>Status *</b> Partial	<b>Department * Current Department</b> Building	<b>Inspector * Current User</b> Building Daily
<b>Result Comment</b> <a href="#">Standard Comments</a>			
<a href="#">check spelling</a>			
<b>Record Type *</b> Building/Residential/New/NA		<b>Internal use only *</b> <a href="#">12CAP-00000-0003N</a>	

4. Edit the desired inspection fields. For more information on inspection fields, see [Edit Inspection Fields](#).
5. Click **Submit**.  
Civic Platform saves the inspection detail changes.

## Copying an Inspection

You can copy an inspection from an existing application and attach it to the application that you are working with. For more information about working with copied inspections, see [Inspections](#) .


### To copy an inspection

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Click the Inspections tab.  
Civic Platform lists inspections in order by scheduled date.
3. Select a view from the **Show** drop-down list.  
Civic Platform displays the inspections that correspond to the selected value.
4. In the Record ID column, click the link next to the application to which you want to copy an inspection.  
Civic Platform displays the inspection detail on the secondary tabs.
5. Click **Select Record to Copy from**.  
Civic Platform displays the Record ID list.



**Inspections**

Menu ▾   Submit   Reset   Cancel   Help

Record ID  

---

Record ID : BLD12-00009

<a href="#">Sched Date</a>	<a href="#">Inspection Type</a>	<a href="#">Status</a>	<a href="#">Insp Date</a>	<a href="#">Department</a>	<a href="#">Inspector</a>	<a href="#">Result Comment</a>	<a href="#">Request Date</a>
<input type="radio"/> 04/27/2012	<a href="#">Foundation</a>	Partial	04/27/2012	BPTDEV/...	Buildin...		04/20/2011
<input type="radio"/> 04/27/2012	<a href="#">Rough Frame</a>	Rejected	04/27/2012	BPTDEV/...	Enforce...		04/23/2011
<input type="radio"/> 04/23/2012	<a href="#">Frame</a>	Pending					04/20/2011
<input type="radio"/> 04/23/2012	<a href="#">Floor Deck</a>	Scheduled		BPTDEV/...	Enforce...		04/23/2011
<input type="radio"/> 04/23/2012	<a href="#">Building Final</a>	Scheduled		BPTDEV/...	Asset A...		04/23/2011

6. Search for the record you want to copy the inspection from and select that inspection.
7. Click **Submit**.
8. Ensure that the **Record Type**, **Department**, **Inspector**, **Inspection Type**, and **Scheduled Date** fields are complete. For more information on these fields, see [Edit Inspection Fields](#).
9. Click **Save**.  
Civic Platform copies the inspection with all its associated checklists to the record you opened at the beginning of the task.

## Working with Checklists

You can view and you can edit inspection checklists using the Checklists secondary tab. For more information on using checklists with inspections, see [Inspections](#) .

### To view an inspection checklist

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Select a view from the **Show** drop-down list.  
Civic Platform displays the inspections that correspond to the selected value.
3. Select the desired inspection.
4. Click the Checklist secondary tab.  
Civic Platform displays the Inspection Checklist page.

## Working with Conditions

You can view and apply inspection conditions using the Conditions secondary tab. For more information on how conditions relate to inspections, see [Inspections](#) .

### To view inspection conditions

1. Navigate to the Calendar portlet and choose the calendar you want to view.  
Civic Platform displays the inspection calendar for the current date.
2. Select a view from the **Show** drop-down list.  
Civic Platform displays the inspections that correspond to the selected value.
3. Select the desired inspection.

Civic Platform displays the inspection detail in the Edit Inspection portlet.

**4.** Click the Conditions secondary tab.

Civic Platform displays any conditions associated with the inspection.

## **Working with Documents**

You can add documents and image files to an inspection using the Documents secondary tab. For example, during the course of a Fire inspection, the inspector takes a photograph of broken fire equipment. The inspector can then upload the photograph into the inspection record. You can attach inspection documents to inspections any time after scheduling in Civic Platform, even after the inspector submits the results. These documents display in all portlets where a Civic Platform user may view details about the inspection, including the Building and Calendar portlets.

For information about uploading and accessing documents, see [Attachments](#) .

## Working with Meeting Calendars

You create, review and modify meeting agendas and other meeting details in the Civic Platform Calendar portlet. When you schedule a meeting, you use a meeting calendar and meeting type.

### Topics

- [Viewing and Finding Scheduled Calendar Items](#)
- [Scheduling a Meeting](#)
- [Modifying Meeting Details](#)
- [Scheduling or Rescheduling a Meeting from the Records Portlet](#)
- [Rejecting a Meeting](#)
- [Cancelling a Meeting](#)
- [Deleting a Meeting or User Event](#)
- [Working with Meeting Agendas and Voting](#)
- [Viewing a Meeting Agenda](#)
- [Adding and Removing Meeting Attendees](#)
- [Setting Meeting Attendance](#)
- [Setting Meeting Attachments](#)
- [Sending Meeting Notifications](#)

### Viewing and Finding Scheduled Calendar Items

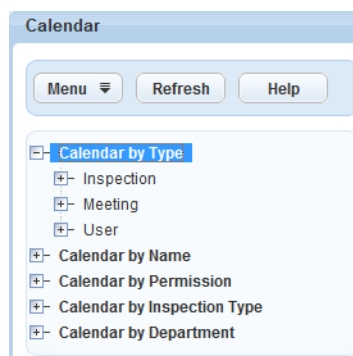
You can navigate to inspections, meetings, and user events from the Calendars portlet. You can also find scheduled meetings from the Records portlet and the My Tasks portlet.

#### To view or find a scheduled calendar item

- View the scheduled item from the Calendars portlet.

1. Access the Calendars portlet.

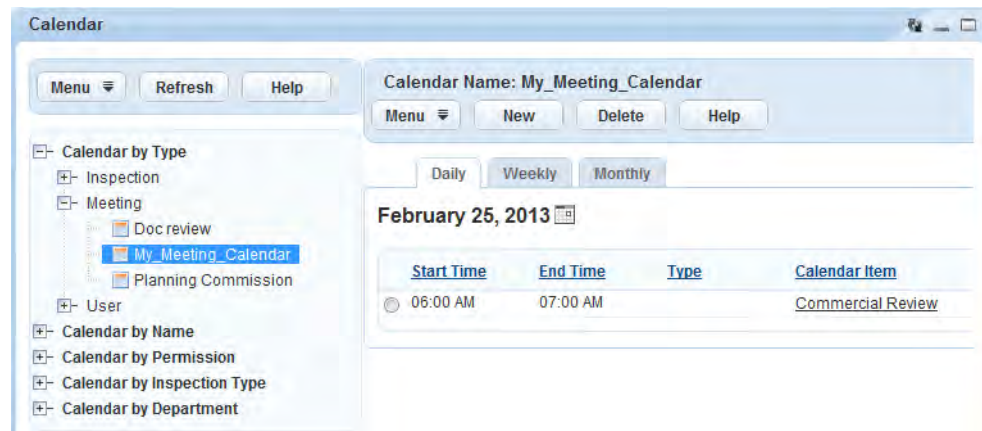
Civic Platform displays a portlet for navigating calendars.



#### Note:

You can navigate meeting calendars by type, name, permission, inspection type, or department.

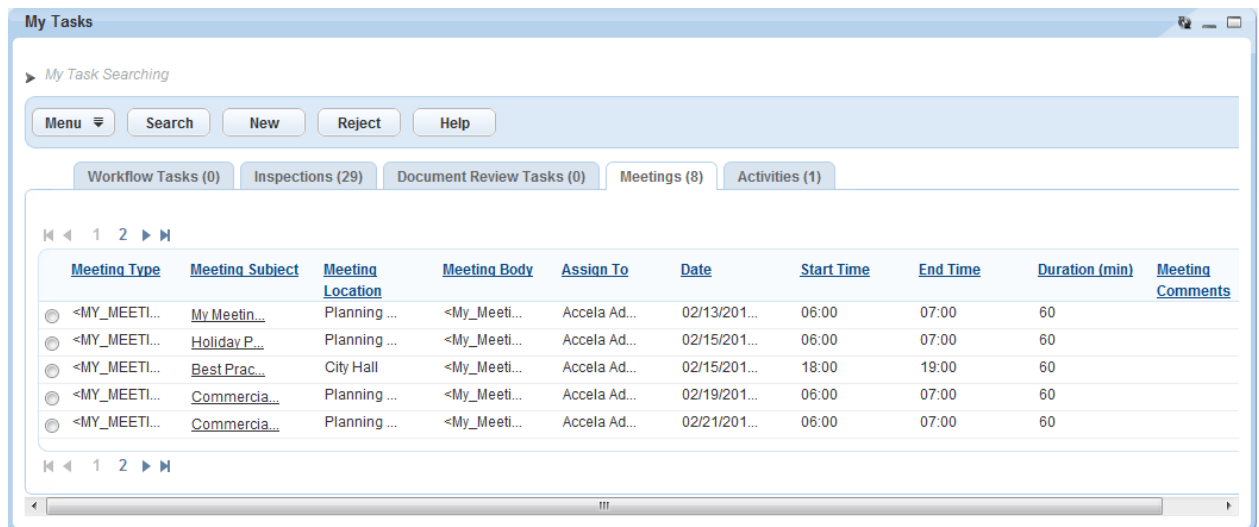
- Expand the calendar categories on the left side panel until you find the calendar for which you want to view scheduled items.



Civic Platform displays scheduled items, that use the selected calendar, under the Daily, Weekly, and Monthly tabs.

- View or find meetings from the My Tasks portlet.
  - Access the My Tasks portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
    - To view meetings, click the Meetings tab.
 

Civic Platform displays your meetings.



- Find meetings.
  - Click **Search**.
 

Civic Platform displays the meeting search form.

2. Complete search criteria in accordance with [Meeting Search Criteria](#).

3. Click **Submit**.

Civic Platform displays the search results.

Table 21: Meeting Search Criteria

Label	Description
<b>Subject</b>	Field containing the meeting subject
<b>Meeting Type</b>	Drop-down list containing the available meeting type values. You determine value options by the MEETING_TYPE Standard Choice.
<b>Location</b>	Drop-down list containing the meeting location values. You determine value options by the MEETING LOCATION Standard Choice.
<b>Responsible Person</b>	First drop-down list is department, second drop-down list is name
<b>Meeting Date, From\To</b>	Search by a range of meeting dates.
<b>Meeting Body</b>	Drop-down list containing meeting body values. You determine value options by the MEETING BODY Standard Choice.
<b>Meeting Comments</b>	Text area
<b>Attendee</b>	If meeting includes the specified attendee, you can search the meeting by the attendee.
<b>Agenda Record ID</b>	Search meeting by meeting associated record ID.
<b>Agenda Alternate ID</b>	Search meeting by meeting an alternate record ID.
<b>Agenda Record Application Name</b>	Search meeting by meeting associated record application name.

- View meetings from the Records portlet
  1. Access the Records portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
  2. Select the record for which you want to access the associated meetings.
- Click the Meetings tab in the record details portlet.  
Civic Platform displays meetings for which the selected record is an agenda item.

**Record**

Menu Search New Create By Form Create From Model Delete GIS

1 2 3 4 5 6

Record #	Status	Record Type	Application Name	Open Date
<a href="#">BLD13-00001</a>	Submitted	Commercial Pool-Spa	Commercial Spa	02/21/2
<a href="#">BLD12-00012</a>	Submitted	Multi-Family New	Park Place Apartments	07/01/2
<a href="#">BLD12-00011</a>	Issued	Residential New	LaFong Residence	05/06/2
<a href="#">BLD12-00010</a>	Ready to Issue	Commercial New	New Mixed Use Offic...	04/13/2
<a href="#">BLD12-00009</a>	Issued	Residential New	King Residence	03/08/2

Record ID: BLD12-00010

Menu Manage Meeting Calendar Help

Go To Summary Meetings (2) Record Activities (0) Activity Summary (5) Address

Meeting Body	Subject	Location
<My Meeting Body>	Commercial Review	Planning Commission Room
<My Meeting Body>	Doc review	City Hall

- Click the **Calendars** tab in the record details portlet. Civic Platform displays the meetings on the monthly calendar.

<a href="#">BLD12-00005</a>	Plan Review	Commercial Addition	Bedroom addition	01/31/2012	2012
<a href="#">BLD12-00004</a>	CofO Issued	Commercial New	New Target super store	01/30/2012	2633

Record ID: BLD12-00005

**Notice**  
 A notice was added to this record on 2012-02-13.  
 Condition: As Built Plans : As-Built Plans are required for all construction that has been altered from approved plans during the construction phase  
 Total conditions: 1 (Notice: 1)  
[View notice](#)

Manage Meeting New Inspection Help

Go To Summary Meetings (2) Calendar Activities (0) Record Activity Summary (5) Address (2)

<< Last Month February 2013 Show All Calendars Next Month >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19 06:00a-07:00a <a href="#">Commercial Review</a>	20	21 All day <a href="#">Doc review</a>	22	23
24	25	26	27	28		

## Scheduling a Meeting

You can schedule a new meeting from the Calendars portlet, the Records portlet, or the My Tasks portlet. When you schedule a meeting, you first create the meeting by submitting details, which include the meeting date, time, location, the maximum number of records for the agenda, and so forth. After you create the meeting, you can modify other tabs of information related to the meeting.

### To schedule a new meeting

- Schedule a meeting from the Calendar portlet.
  1. Find the calendar for which you want to schedule an item ([Viewing and Finding Scheduled Calendar Items](#)).
  2. Click **New**.
- Schedule a meeting from the Records portlet.
  1. Access the Records portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
  2. Access the record for which you want to schedule a meeting.
  3. Hover over the **Manage Meeting** drop-down button and select **New Meeting**.
- Schedule a new meeting from the My Tasks portlet.
  1. Access the My Tasks portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
  2. Click the Meetings tab.
  3. Click **New**.  
Civic Platform displays the calendar item details page.

Meeting

<p>Meeting Calendar * Doc review</p> <p>Date * 03/14/2013</p> <p>Start Time * 06 : 00 AM</p> <p>Meeting Body * --Select--</p> <p>Meeting Status --Select--</p> <p>Organizer ADMIN</p>	<p>Meeting Type * --Select--</p> <p>End Time * 07 : 00 AM</p> <p>Location * --Select--</p> <p>Comments <input style="width: 100%; height: 40px;" type="text"/></p> <p><a href="#">check spelling</a></p> <p>Reminder * <input style="width: 80%;" type="text"/> Day(s)</p>	<p>Subject *</p> <p><input type="checkbox"/> All Day Event</p> <p>Maximum Agenda Items *</p> <p>Responsible Person * <b>Current User</b> Administrator Accela Administrator</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Recurrence:</p> <p><input checked="" type="radio"/> None</p> <p><input type="radio"/> Repeat every <input type="text"/> day(s)</p> <p><input type="radio"/> Repeat every <input type="text"/> week(s) on</p> <p><input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday</p> <p><input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday</p> <p><input checked="" type="radio"/> Repeat every <input type="text"/> month(s) on <input type="text"/> First</p> <p><input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday</p> <p><input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday</p> <p><input checked="" type="radio"/> Repeat every <input type="text"/> year(s)</p> <p>End Re-occurrence <input style="width: 100%;" type="text"/></p> </div>
---	--	--

1. Complete the fields in accordance with [Calendar Item Details](#).

**Note:**

If the meeting type definition includes a template specification, additional ASI fields may appear on the details page along with the standard details fields. The fields that appear depend on the template specification for the meeting type.

**Note:**

The fields to complete depends on the calendar type (meeting, agency holiday, user) for which you are scheduling an item.

**2. Click **Submit**.**

Civic Platform creates the new calendar item.

**Modifying Meeting Details**

You can modify meeting details through the Calendar portlet, Record portlet, or My Tasks portlet. For example, you may need to change the meeting date, time, location, or status. If your agency administrator configures meeting notification e-mails, you can email a meeting change notification to meeting attendees.

**To modify meeting details**

- Modify meeting details from the Calendars portlet.
  1. Find the calendar item for which you want to modify the schedule details ([Viewing and Finding Scheduled Calendar Items](#)).
  2. Click the link to the specific calendar item of interest.  
Civic Platform displays meeting details.
- Modify meeting details from the My Tasks portlet.
  1. Access the My Tasks portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
  2. Click the Meetings tab.
  3. Click the link for the meeting you want to modify.  
Civic Platform displays meeting details.
- Modify meeting details from the Records portlet.
  1. Access the Records portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
  2. Select the record for which you want to modify meeting details.
  3. Click the Meetings tab in the record details portlet.  
Civic Platform displays meetings for which the selected record is an agenda item.
  4. Click the link for the meeting you want to modify.  
Civic Platform displays meeting details.
- Modify meeting details, as required ([Calendar Item Details](#)).
- Click **Submit**.

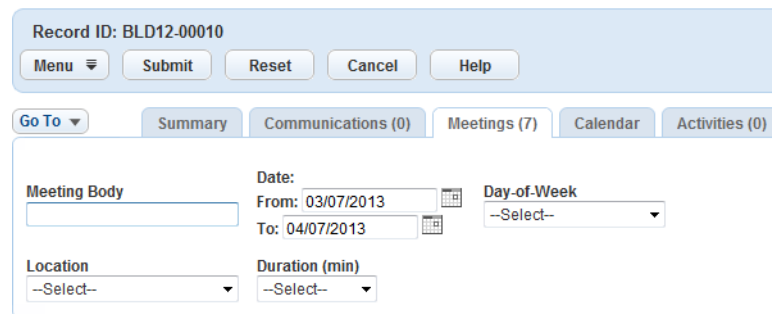


## Scheduling or Rescheduling a Meeting from the Records Portlet

### To schedule or reschedule meeting from the Records portlet

1. Access the Records portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
2. Select the record for which you want to schedule or reschedule a meeting.
3. Click the Meetings tab in the record details portlet.  
Civic Platform displays meetings for which the selected record is an agenda item.
4. Select the option next to the meeting you want to schedule or reschedule.
5. Hover over the **Manage Meeting** drop-down button and select **Schedule Meeting** or **Reschedule Meeting**.

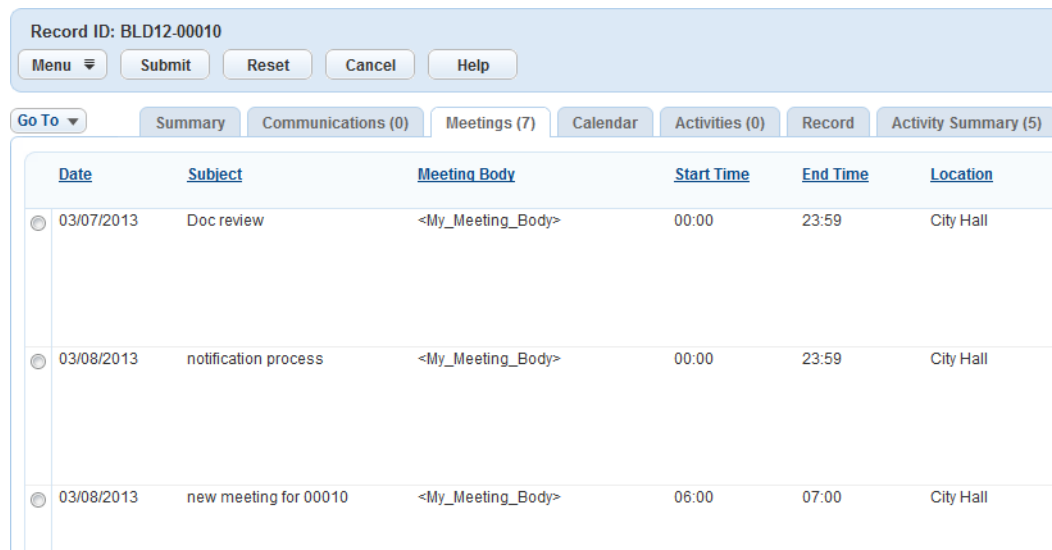
Civic Platform displays parameters for the proposed rescheduling.



6. Enter the specified parameters.

7. Click **Submit**.

Civic Platform displays a list of scheduled meetings that match your specified parameters.



Date	Subject	Meeting Body	Start Time	End Time	Location
03/07/2013	Doc review	<My_Meeting_Body>	00:00	23:59	City Hall
03/08/2013	notification process	<My_Meeting_Body>	00:00	23:59	City Hall
03/08/2013	new meeting for 00010	<My_Meeting_Body>	06:00	07:00	City Hall

8. Select the option for the meeting you want to schedule or reschedule.

9. Click **Submit**.

10. Modify meeting details as required ([Modifying Meeting Details](#)).

Civic Platform assigns the record to the meeting and sets the assign status to Scheduled or Rescheduled.

## Rejecting a Meeting

### To reject a meeting

1. Access the My Tasks portlet (see Navigating with Main Links in the *Accela Civic Platform User Guide*).
2. Click the Meetings tab.  
Civic Platform displays your meetings.
3. Click the option for the meeting you want to reject.
4. Click **Reject**.  
Civic Platform removes you from the meeting and sends an email notification to the responsible person.



#### Note:

You can only reject meetings assigned to you. Only internal users can reject a meeting.



#### Note:

If you previously received an Outlook invitation to the meeting, Civic Platform generates a normal Outlook email for the rejection, not an Outlook rejection email.

## Cancelling a Meeting

You can cancel a meeting, associated with a specific record, from the Records portlet.

### To cancel a meeting

1. Access the Records portlet (see Navigating with Main Links in the *Civic Platform User Guide*).
2. Select the record for which you want to cancel a meeting.
3. Click the Meetings tab in the record details portlet.
4. Select the meeting you want to cancel.
5. Hover over the **Manage Meeting** drop-down button and select **Cancel Meeting**.  
Civic Platform displays the dialog to enter a cancellation reason.

6. Complete the dialog.
7. Click **Submit**.  
Civic Platform removes the meeting from the calendar and changes the assign status to Cancelled.

## Deleting a Meeting or User Event

You can delete a scheduled meeting or delete a user event. To cancel an inspection, see [Cancelling an Inspection](#)

### To delete a calendar item

1. Find the calendar item for which you want to modify the schedule details ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the link to the specific calendar item of interest.  
Civic Platform displays the schedule details for the selected calendar item.



#### Note:

You must remove all agenda items (records) from a meeting calendar item before you can delete it.

4. Click **Delete**.  
Civic Platform deletes the calendar item.

## Working with Meeting Agendas and Voting

### To work with meeting agendas and votes

1. Find the calendar item for which you want to set the agenda and voting ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the link to the specific calendar item of interest.  
Civic Platform displays the schedule details for the selected calendar item.
4. Click the Agenda & Vote tab.  
Civic Platform displays current record(s) comprising the agenda, if any.

The screenshot shows the 'Meeting: Commercial Review' interface. At the top, there are buttons for 'Menu', 'Add', 'Move', 'Remove', and 'Help'. Below these are tabs for 'Details', 'Agenda & Vote', 'Attendees', 'Attendance', and 'Attachments'. The 'Agenda & Vote' tab is selected, and a message states '2 record(s) added successfully.' Below this is a table with columns for 'Case Number', 'Reason', 'Comments', and 'Application Duration (min)'. Two records are listed: 'BLD12-00005' and 'BLD12-00010', each with a corresponding 'Comments' input field and a vertical scroll bar.

Case Number	Reason	Comments	Application Duration (min)
BLD12-00005			
BLD12-00010			

5. If required, add a record to the agenda.
  - a. Click **Add**.  
Civic Platform displays details for setting the agenda and vote.

Menu ▾ Submit Reset Cancel Help

Record #  Opened Date: From: 02/20/2011 To: 02/19/2013 Record Status --Select--

OR Exact Street #  Direction --Select-- Street Name  Type --Select-- Record Type Group --Select--

Application Name  Assigned To [Current User](#) --Select--

Contact Type --Select-- Contact Organization Name

First Name  Last Name

Owner Name  Parcel #

Current Workflow Task --Select-- Current Workflow Status --Select--

App Specific Info Label  App Specific Info Value

- b. Complete the fields. See [Application Record Fields](#) for field definitions. Civic Platform displays records matching your search criteria.
  - c. Select the record(s) you want to add to the agenda.
  - d. Click **Submit**.  
Civic Platform adds the selected record to the agenda.
6. If required, remove a record from the agenda.
- a. Select the records you want to remove from the agenda.
  - b. Click **Remove**.  
Civic Platform displays the Meeting Reason and Comment dialog.

- c. Select a reason and enter optional comments.
  - d. Click **Submit**.  
Civic Platform removes the record from the agenda.
7. If required, vote on an agenda record.

- a. Click the triangle symbol next to an agenda record to display the voting section.  
Civic Platform displays voting options for meeting attendees with voting privileges.

Details | Agenda & Vote | Attendees | Attendance | Attachments

Case Number	Reason	Comments
BLD12-00005		

Name	Attendee Type	Phone	E-mail	Vote Result
John Wilson	Applicant	2423233434		--Select--
Frederick J Jones	Contractor	925-888-1234	fjones@fj...	--Select--
Accela Administrator				--Select--

Save | Delete Vote Member | Add Vote Member

Vote Result: 0 voted, 3 not voted, Abstain - 0 (0%), Accept - 0 (0%), Reject - 0 (0%)

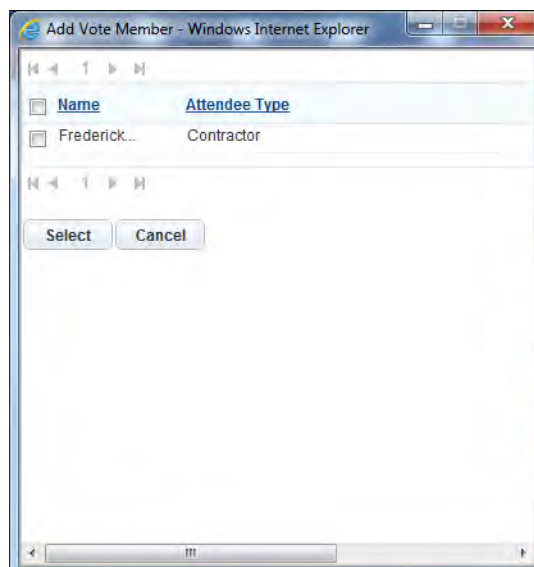
BLD12-00007		
BLD12-00010		



**Note:**

Only Civic Platform internal users can vote. A responsible internal user can serve as a proxy to vote for external users.

- b. If required, remove an attendee from the voting roster.
- Select the attendee you want to remove from the voting roster.
  - Click **Delete Voter**.  
Civic Platform removes the attendee from the voting roster.
- c. If required, add an attendee to the voting roster.
- Click **Add Voter**.  
Civic Platform displays the list of attendees not on the voting roster.



- b. Select the attendee.
- c. Click **Select**.  
Civic Platform adds the selected attendee to the voting roster.
- d. Select the vote result from the drop-down list.
- e. Click **Save**.  
Civic Platform saves the voting results.

## Viewing a Meeting Agenda

The records associated with a meeting determine the meeting agenda. You can review the meeting agenda for each scheduled hearing.

### To view a meeting agenda

1. View or find the meeting for which you want to view the agenda ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the link to the meeting.  
Civic Platform displays meeting details.
3. Click the Agenda & Vote tab.  
Civic Platform displays the records associated with the meeting.

## Adding and Removing Meeting Attendees

### To set meeting attendees

1. Find the calendar item for which you want to set the attendees ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the link to the specific calendar item of interest.  
Civic Platform displays the schedule details for the selected calendar item.
4. Click the Attendees tab.  
Civic Platform displays the availability of current attendees.

Meeting: Initial Findings

Submit Add Remove Help

Details Agenda & Vote Attendees Attendance Attachments

Date: 02/05/2013 Start Time: 06:00 AM End Time: 07:00 AM

Attendees Calendar

Saturday, February 02, 2013

	08:00	09:00	10:00	11:00	12:00	01:00	02:00	03:00	04:00
Building Daily									
Building Admin									

- If required, add one or more attendees.
  1. Click **Add**.  
Civic Platform displays a form for adding attendees.

2. Select the users or groups you want to add as attendees.
  3. Click **Save**.  
Civic Platform adds the selected users and groups to the meeting.
- If required, remove one or more attendees.
    1. Select the users or groups you want to remove.
    2. Click **Remove**.  
Civic Platform removes the selected users or groups from the meeting.

## Setting Meeting Attendance

### To set meeting attendance

1. Find the calendar item for which you want to set the attendance ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the link to the specific calendar item of interest.  
Civic Platform displays the schedule details for the selected calendar item.
4. Click the Attendance tab.  
Civic Platform displays details for setting the attendance.

Meeting: Initial Findings

Menu Save Reset Help

Details Agenda & Vote Attendees Attendance Attachments

Total: 2 Present: 0 Absent: 0

Name	Phone	E-mail	Attendance
Building ...			--Select--
Building ...	925-633-0001	dbuilding..	--Select--

5. For each attendee, set their attendance from the drop-down list as Present or Absent.
6. Click **Save**.  
Civic Platform displays the count of present and absent attendees.

## Setting Meeting Attachments

You can attach documents to a meeting, before or after the meeting. You can attach documents directly to the meeting, or you can also attach documents from agenda items (records) specified for the meeting.

### To set meeting attachments

1. Find the calendar item for which you want to set the attachments ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.

3. Click the link to the specific meeting of interest.  
Civic Platform displays the schedule details for the selected meeting.
4. Click the Attachments tab.  
Civic Platform displays details for setting the attachments.
5. If required, add one or more attachments to your meeting (see [Attachments](#) ).
6. If required, add a record attachment.
  - a. Click the **Record Attachments** option.  
Civic Platform displays attachments to the records that comprise the agenda of the meeting ([Working with Meeting Agendas and Voting](#)).

<input type="checkbox"/>	File Name	Category	Description	Size	Uploaded On	Uploaded By	Source
<input type="checkbox"/>	Floor Plans			190.05 KB	04/15/2012	Building ...	ADS
<input type="checkbox"/>	Floor plan Agen...			208.98 KB	04/16/2012	Building ...	ADS
<input type="checkbox"/>	AA Cert of Occu...	Letter of	Recommendation	39.49 KB	04/17/2012	Building ...	ADS

- b. Select the attachment(s) you want to download.
  - c. Click **Download**.  
Civic Platform downloads the selected attachment(s).
7. Click Submit.

## Sending Meeting Notifications

When you send a meeting calendar item, Civic Platform can send an email of changes to designated recipients. The meeting type for the meeting determines when to send a notification, who to send the notification to, and the format to use for the notification.

### To send a meeting notification

1. Find the calendar item for which you want to send a notification ([Viewing and Finding Scheduled Calendar Items](#)).
2. Click the Daily, Weekly, or Monthly tab.
3. Click the link to the specific calendar item of interest.
4. Click **Send**.  
Civic Platform displays the email Notification page.



If your agency implements Microsoft Outlook integration, Civic Platform also displays meeting notification information for Microsoft Outlook.

For Microsoft Outlook invites, Accela Civic Platform highlights changes to location, date, time, and internal attendees as shown in the image below.

5. Complete the form in accordance with [Email Notification Form Fields](#).

Table 22: Email Notification Form Fields

Label	Description
Outlook Invite for Internal Meeting Attendees	
Template	Drop-down list of available email templates for internal users, and list of current internal user meeting attendees.
Outlook Invite for External Meeting Attendees	
External Template	Drop-down list of available email templates for external users, and list of external user meeting attendees.



**Note:**

The email notification form lists attendees who received a prior email notification.

6. If required, modify or view the notification template.

a.



Click the icon to view or modify the notification template.

Civic Platform displays the Notification Template detail portlet.

Notification Template: PLAN REVIEWS

Menu Save Reset Help

Title  
Outlook integration

Importance  
Normal

Content [GUIDE](#)

Verdana 2 (10 pt) **B** *I* U [Text Formatting Icons]

<content of meeting notification message>

[check spelling](#)

Display in ACA  
 Display as Alert  
 Save as Attachment

Attach To \*  
Record

Document Group \*  
BLD


Document Category \*  
Documents

EDMS Name \*  
Accela

- a. See the section on Communication Manager in the *Accela Civic Platform Release Notes and Addendum* for information on creating and modifying notification templates.
- b. Click **Save**.

**Note:**

You can view the template if you do not have permission to update the template.

7. If required, add an attachment to the email notice.
  - a. Hover over the attach icon  and click the Attach Document link.
  - a. Civic Platform displays currently attached documents.

Meeting: Hearing for Complaint

Menu Save Cancel Help

Show all attachments.  Show selected attachments only. Max size: 10.0MB

File Name	Size	Type	Uploaded By	Department
2010_UI of Send Window.docx	609.33 KB	application/msword	Carol Gong	Office of Admin...
720FP4 ALM 12ACC-05073 DataMigration....	811.16 KB	application/vnd...	Carol Gong	Office of Admin...

- b. Select files you want attached to the email notice.
- c. Click **Select**.

**Note:**

The file size for all selected attachments must not exceed the maximum size. To change the maximum size, see Communication Manager > General Settings > Attachments settings > Field "Maximum Size of Total Files."

**8. Click Send Now.**

Civic Platform sends the notification to selected attendees by standard email, Outlook invite, and Civic Platform alerts.

**Note:**

If your agency implements Civic Platform integration with Microsoft Outlook, Civic Platform meeting invites also appear as Microsoft Office meeting invites. Microsoft Office does not communicate action on Civic Platform meeting invites, acceptance or rejection for example, back to Civic Platform.

---

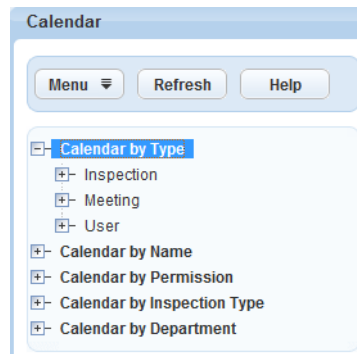
## Working with User Calendars

User calendar events specify time periods during which a user is not available for scheduling of other types of calendar events (meetings or inspections). You can specify the user calendar event as a holiday, weekend, or block out type.

### To schedule a user calendar event

1. Access the Calendars portlet.

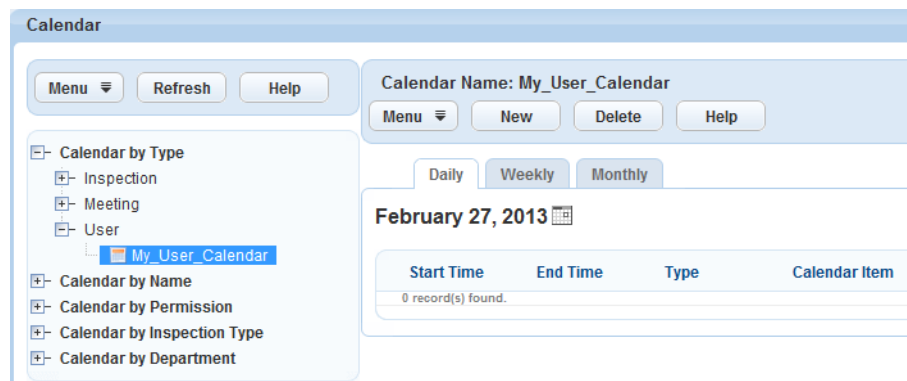
Civic Platform displays a portlet for navigating calendars.



#### Note:

You can navigate user calendars by type or name.

2. Expand the calendar categories on the left side panel until you find the user calendar you want to use to create the event.



Civic Platform displays scheduled items, that use the selected calendar, under the Daily, Weekly, and Monthly tabs.

3. Select the user calendar for which you want to schedule an event.
4. Click **New**.

Civic Platform displays event details.

Calendar Item

Menu

Item

Date \* 02/26/2013

Start Time 06 : 00 AM/PM AM/PM AM

Type \* Holiday AM/PM AM

Calendar Item \*

All Day Event

Recurrence:

None

Repeat every  day(s)

Repeat every  week(s) on

Sunday  Monday  Tuesday  Wednesday

Thursday  Friday  Saturday

Repeat every  month(s) on First

Sunday  Monday  Tuesday  Wednesday

Thursday  Friday  Saturday

Repeat every  year(s)

End Re-occurrence

Comments

[check spelling](#)

5. Complete the fields. See [Calendar Item Details](#) for field definitions.

6. Click **Submit**.

Civic Platform creates a new user calendar event.

## Examining Calendar (and Related) Details

There are many detail forms and many entry fields that you might encounter as you work with calendars and scheduling. The following tables list and define the default fields available in the different interfaces you encounter.

- [Schedule Inspections Fields](#)
- [Pending Inspections Fields](#)
- [Edit Inspection Fields](#)
- [Calendar Item Details](#)

### Schedule Inspections Fields

The following fields may be available when scheduling inspections.

Table 23: Schedule Inspections Fields

<b>Address</b>	This field automatically populates with the application's address.
<b>Alternate ID</b>	This field displays the alternate identification number for the application. If you click the link at the alternate ID of an application, a window pops up displaying the details for the application.
<b>Assign to All</b>	Select values from <b>Department</b> and <b>Inspector</b> drop-down lists to assign all the inspections to one inspector from a specific department.
<b>Comment Display in ACA</b>	Activated when you select the <b>Display Comment in ACA</b> option. This is the type of user that can view the inspection results comments.
<b>Department</b>	The department that includes the inspectors to which you want to assign inspections.
<b>Desired Date</b>	The desired date for the inspection.
<b>Desired Time</b>	The desired time for the inspection.
<b>Display Comment in ACA</b>	Applies only to Citizen Access users. Indicates whether ACA users can view the inspection results comments.
<b>Estimated End Time</b> <b>Estimated Start Time</b>	These fields define the time period within which the inspector should arrive. The time period displays in the <b>Estimated Arrival Time</b> field in the inspection in Citizen Access, which enables the applicant to prepare for the inspector's arrival.
<b>GIS Area</b>	If the application for which you are scheduling an inspection has a parent application that is a project application, then the GIS Object ID of the parent application appears in this field.
<b>Inspector</b>	The inspector to which you want to assign inspections. You can also click the Current User button to populate this field with the current user's name. When you select an inspector from this list, all the selected inspections display the staff member's name in the Assign to Staff field.
<b>Inspector Calendar</b>	The Inspector Calendar displays inspector schedules. For example, if Civic Platform associates Kate with three inspection calendars, then the Inspector Calendar displays a combined view of Kate's inspection assignments for all three calendars.

<b>Inspector List</b>	The inspector list displays the inspectors selected in the Assign to Staff drop-down list. The inspector calendar for each selected inspector displays next to the inspector list. The inspector that best matches the inspection(s) displays at the top of the list. Inspectors with enabled and configured inspection profiles display at the top of the list; inspectors without configured inspection profiles display at the bottom of the list. You can select only one inspector from this list.
<b>Inspection List</b>	This list displays all the inspections selected for scheduling. Civic Platform lists inspections by schedule order. Civic Platform highlights the first inspection by default.
<b>Inspection Sequence Number</b>	This field populates with the inspection sequence number. Sequence numbers are unique and incremental.
<b>Inspection Type</b>	This field displays the type of inspection that you are scheduling.
<b>Latitude</b>	The inspection location's latitudinal coordinates.
<b>Legend</b>	The Inspector Calendar Legend indicates the status of inspections on each inspector's calendar: Blue - a scheduled inspection, Purple - an unscheduled inspection, White - available time, Gray - block out time, Orange - default calendar unit value.
<b>Longitude</b>	The inspection location's longitudinal coordinates.
<b>Next Available Time</b>	Indicates whether to schedule the inspection for the next available calendar time. Civic Platform determines the next available time by using the calendar's daily allocated units, scheduled inspections, and default block times. Your agency administrator determines the calendar daily allocated units and default block times. Default inspection block times are 8:00 am - 12:00 pm and 1:00 - 4:30 pm.
<b>Next Available Time for Inspector</b>	Indicates whether to schedule the inspection for the selected inspector's next available time.
<b>Record ID</b>	The application identification number for which you are scheduling an inspection.
<b>Record Type</b>	The application type for which you are scheduling an inspection.
<b>Request Comment</b>	Comments about the new inspection. You may identify who requested the inspection, or any other important details.
<b>Requestor</b>	The first, middle, and last name of the person who requested or scheduled the inspection, if other than the current user.
<b>Requestor's Phone Number</b>	The phone number for the person who requested the inspection.
<b>Scheduled Date</b>	The date that the inspection is to take place.
<b>Scheduled End Time</b>	The scheduled end time for the inspection. The end time you set for an inspection overrides the end time as calculated by the associated inspection calendar. When you modify the inspection end time, the inspection type unit value and the available inspector units update to reflect the change.
<b>Scheduled Start Time</b>	The scheduled time to start the inspection.
<b>Status</b>	This field indicates the current status of the inspection. If you are scheduling a new inspection, the status is "New." If you cancel an inspection, the status is "Cancelled."

## Pending Inspections Fields

The following fields may be available for pending inspections.

Table 24: Pending Inspections Fields

<b>Application No.</b>	The application number for which you want to request inspections.
------------------------	---

<b>Available Inspection Types</b>	This box displays the inspection types associated with the default inspection group for the application. If your agency sets up inspection flow or inspection milestones for the selected application, an icon displays that reflects the status of each inspection type.
<b>Delete</b>	Use to delete selected inspection types
<b>Existing Pending Inspections</b>	Current pending inspections for the selected application display in this list. If your agency sets up inspection flow or inspection milestones for the selected application, an icon displays that reflects the status of each inspection type. If you cannot schedule an inspection type in an inspection flow or a milestone process, the inspection type is grayed out. Only supervisors can schedule inspections outside of the inspection flow or the milestone order.
<b>Inspection Group</b>	This displays all available inspection groups. The selected intake form's default inspection group displays first in the list.
<b>Pending Inspections</b>	Assigns the inspection types displayed in the Available Inspection Types list to the selected application. The status for all assigned inspections is Pending.
<b>Pending Inspections List</b>	This list displays two types of inspections: existing pending inspections and inspection types selected from the Available Inspection Types list.
<b>Schedule Inspections</b>	Displays the Schedule Inspections portlet for selected inspections. If you enable inspection flow, and you attempt to schedule inspections that do not belong to an inspection flow, an error message displays.
<b>Selected Inspection Types</b>	Displays the inspection types selected from the Available Inspection Types box. If your agency sets up inspection flow or inspection milestones for the selected application, an icon displays that reflects the status of each inspection type.
<b>Selected Records</b>	Displays the following information about the application for which you request inspections: application alternate ID, application name, short notes, and primary/first address.

## Edit Inspection Fields

The following fields may be available when editing inspections.

Table 25: Edit Inspection Fields

<b>Address</b>	The application's address.
<b>Alternate ID</b>	The record ID number.
<b>Address</b>	The inspection location address.
<b>Billable</b>	Indicates whether the agency can bill for time spent on an inspection.
<b>Comment Display in ACA</b>	Activated when you select the <b>Display Comment in ACA</b> option. Specifies what type of user can view the inspection results comments. Choices include All ACA Users, Record Creator, and Record Creator & Licensed Professional.
<b>Created by ACA</b>	This field displays "Yes" if the scheduled inspection originated in Citizen Access; otherwise, the field displays "No."
<b>Department</b>	The inspector's department.
<b>Display Comment in ACA</b>	Applies only to Citizen Access users. Indicates whether ACA users can view the inspection results comments.
<b>Document Name</b>	Enter the title of the document you are attaching to the inspection.
<b>EDMS Name</b>	The name of the electronic document management system. Use this field when attaching documents to an inspection. For more information, see <a href="#">Working with Documents</a> .
<b>End Mileage</b>	The mileage reading from the vehicle odometer after you complete the inspection.



<b>End Time</b>	The time that the inspector completes the inspection.
<b>File Name</b>	The filename and path for the document. Users can click <b>Browse</b> to locate the file on your computer. The document size may be up to 16MB.
<b>GIS Area</b>	If the application with the scheduled inspection has a parent application that is a also project application, then the GIS Object ID of the parent application appears in this field.
<b>Inspector</b>	The name of the inspector responsible for completing the inspection.
<b>Inspection Date</b>	The date that you complete the inspection.
<b>Inspection Sequence Number</b>	This field populates with the inspection sequence number. Sequence numbers are unique and incremental.
<b>Inspection Time</b>	The time of day that you complete the inspection.
<b>Inspection Type</b>	The type of inspection scheduled.
<b>Latitude</b>	The inspection location's latitudinal coordinates.
<b>Longitude</b>	The inspection location's longitudinal coordinates.
<b>Record ID</b>	The application ID number for which the inspection is to occur.
<b>Record Type</b>	The type of record for which the inspection is to occur.
<b>Request AM/PM</b>	The time block for the scheduled inspection.
<b>Request Comment</b>	Comments about the new inspection. You can identify who requested the inspection or enter other important details. You can also enter predefined comments by clicking the Standard Comments button.
<b>Request Date</b>	Civic Platform automatically generates the request date when a user schedules and submits a new inspection.
<b>Requestor's Phone Number</b>	The phone number for the person who requested the inspection.
<b>Request Time</b>	The time of the inspection request.
<b>Scheduled Date</b>	The date when the inspection is to occur.
<b>Scheduled Time</b>	The time when the inspection is to occur.
<b>Status</b>	This field indicates the current status of the inspection. For example, Denied, Not Ready for Work, or Stop Work.
<b>Submit AM/PM</b>	The time block for the scheduled inspection.
<b>Submit Date</b>	The date the inspection was submitted.
<b>Submit Time</b>	The time the inspection request was submitted.
<b>Total Mileage</b>	The total number of miles required. Civic Platform does not calculate this value automatically.
<b>Unit Nbr</b>	<p>This is the inspections unit number. Unit values typically represent either the number of hours or the number of inspections.</p> <p>What does Civic Platform use the Unit Number for?</p> <p>You can set up inspections so that Civic Platform automatically assigns and schedules inspectors by using inspector profile information, which includes a maximum daily number of inspection units. An inspection unit may be the number of inspections, the number of hours, or another value.</p>
<b>Vehicle ID</b>	This is a number that identifies the vehicle used to complete the inspection, such as the license plate number or VIN.

## Calendar Item Details

The following fields may be available when working with calendar items.

Table 26: Calendar Item Details

Label	Description
<b>All-Day Event</b>	Indicates whether the event occupies the entire calendar day.
<b>Calendar Item</b>	The distinct name for the event that you want to schedule.
<b>Comments</b>	Additional description or details about the event.
<b>Date</b>	The day to schedule the event.
<b>End Re-occurrence</b>	The date to end a recurring event. Blank when continuing an event indefinitely.
<b>End Time</b>	The end time for the event.
<b>Location</b>	Applies to meeting calendar type only. The location of the meeting.
<b>Maximum Agenda Items</b>	Applies to meeting calendar type only. The maximum number of records you can review at the meeting.
<b>Meeting Body</b>	Applies to meeting calendar type only. An individual or a group of people responsible for reviewing records in a public setting, such as planning commission or appeals board.
<b>Meeting Calendar</b>	The name of the calendar that you want to use for the meeting. This field only appears when creating a meeting from the My Tasks, Task Management, and Records portlets.
<b>Meeting Type</b>	Applies to meeting calendar type only. Indicates the type of meeting calendar. Civic Platform only displays those meeting types for which you have permission.
<b>Meeting Status</b>	Applies to meeting calendar type only. This field only appears when you schedule an event on a meeting calendar. Determines the status of the meeting, such as Approved or Pending. The displayed values depend on the status group for the meeting type.
<b>None</b>	For a one-time event without recurrence.
<b>Reminder</b>	Specifies the number of days, before the meeting, to send out a reminder notification.
<b>Repeat every day(s)</b>	To repeat an event every specified number of days.
<b>Repeat every week(s) on</b>	To repeat an event every specified number of weeks on the specified day of the week.
<b>Repeat every month(s) on</b>	To repeat an event every specified number of months on the specified day of the month.
<b>Repeat every year(s)</b>	To repeat an event every specified number of years.
<b>Responsible Person</b>	<p>The responsible person organizes the meeting and assigns attendees. The responsible person defaults to the logged in user. You can also click the Current User link to select the currently logged in user.</p> <p>The Responsible Person drop-down list displays the modules from which you can select a responsible person. When you select a module from the Responsible Person drop-down list, Civic Platform displays the users in that module that you can delegate as the responsible person.</p>
<b>Start Time</b>	The start time for the event.

Label	Description
<b>Type</b>	<p>The type of event. The types of events listed depend on the type of calendar for which you specify the details (meeting, agency holiday, user).</p> <p><b>Block-out</b> - The user calendar. Blocks out a time or day for which the agency cannot provide service.</p> <p><b>Holiday</b> - The user and agency holiday calendars. Choose this option to schedule a holiday. During holiday periods, users cannot make reservations or schedule inspections.</p> <p><b>Weekend</b> - The user and agency holiday calendars. Choose this option to schedule a weekend. During weekend periods, users cannot make reservations or schedule inspections.</p> <hr/>

# Contacts

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Choose a topic from the list below to learn more about working with contacts.

## **Related Information**

[Contacts Overview](#)

[Managing Reference Contacts](#)

[Managing Record Contacts](#)

[Viewing Related Contacts](#)

[Applying a Condition to a Reference Contact](#)

[Viewing Records Associated with a Contact](#)

[Associating Professionals with a Contact](#)

[Associating Reference Addresses with a Contact](#)

[Managing Public Users Associated with Contacts](#)

[Viewing Assets Associated with a Contact](#)

[Examining Contact Details](#)

## Contacts Overview

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Use the Contacts tab to add, maintain, and view information about the people associated with an application. There are two classes of contacts:

- **Reference contacts**

A reference contact is a contact record that is stored in the database, independent of any application or record. You can search for and associate reference contact data when you are completing an application or form. When you associate a reference contact, all of the data for that contact populates automatically into application. This not only saves time, but improves accuracy across multiple applications. You can add reference contacts independent of individual records and applications, build relationships between reference contacts, merge reference contact records, and more. Because reference contacts

- **Transactional record contacts**

A transactional record contact is what we call a contact once it has been added to a record or application, either manually, or by using reference contact information. It is important to distinguish between transactional contacts and reference contacts, because transactional contact data is pertinent to that contact only, whereas reference contact data is pertinent to any new or existing record where that data may appear.

# Managing Reference Contacts

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## Topics

- [Adding a Reference Contact](#)
- [Tips on Searching for a Contact](#)
- [Looking for Close Matches](#)
- [Editing a Reference Contact](#)
- [Adding Also Known As Names of a Contact](#)
- [Managing Contact Addresses of a Contact](#)
- [Managing Attachments Associated with a Contact](#)
- [Building Relationships between Reference Contacts](#)
- [Merging Contacts](#)

## Adding a Reference Contact

You can add new contacts to your reference database. After you add a reference contact, you can look up the contact when associating contacts with a specific application, service request or other record type.

### To add a reference contact

1. Navigate to the Contacts portlet.  
Civic Platform displays a list of reference contacts.
2. Click **New**.  
Civic Platform displays the contact details on the record tab.
3. Complete fields with available data. See [Contact Detail](#) for field definitions. If you are importing contact details from an external permitting system, see [Working in the Applicant and Contact Sections](#).
4. Click **Submit**.

## Tips on Searching for a Contact

### • Performing a Search

You can search for reference contacts using any combination of search criteria, including standard contact fields, template fields, associated activities, or contact addresses. See [Using the Search Features](#) for information about using search functionality in Civic Platform.

### • Searching by Also-Known-As Names

If you search contacts by the First, Middle, Last Name, and/or Full Name fields, Civic Platform not only checks the standard contact fields, but also the also-known-as names (see [Adding Also Known As Names of a Contact](#)) for matches.

### • Looking for Close Matches

Sometimes the search results do not include the contact you intend to find due to a variance in spelling. If your search does not return expected results, try using the “Close Matches” function to find contacts that may not be exact matches, but are close matches to your search criteria.

## Looking for Close Matches

You can start a contact close-match search without providing value for the individual/organization flag. Civic Platform can check the contact fields you already entered, and decide whether to search for individual or organization close matches. Specifically, if any of the following fields has a value: Organization Name, FEIN, or DBA/Trade Name, Civic Platform searches for close matches in organization contacts; Otherwise, it searches for close matches in individual contacts.



### Note:

Agencies can use the standard choices `INDIVIDUAL_CONTACT_MATCH_CRITERIA` and `ORGANIZATION_CONTACT_MATCH_CRITERIA` to define the close match criteria for both individual reference contacts and organization reference contacts. See the *Civic Platform Configuration Reference* for more information about Standard Choices.

### To look for close matches to your search criteria

1. Perform a standard contact search. See [Using the Search Features](#).

Civic Platform displays the search results that exactly meet the search criteria in the contact list portlet.

<input type="checkbox"/>	Title	Last Name	Phone 1	Address Line 1	First Name	Phone 2	Address Line 2
<input type="checkbox"/>	Ms.	Lin	(+001)4...		Judy	(+001)	
<input type="checkbox"/>	Ms.	Liu	4868522		Martha		

2. Click **Close Matches** to view the close matches to the search criteria.

Civic Platform displays all the close matching contacts.

## Editing a Reference Contact

If you need to update contact details, you can search for and modify the contacts records as needed. Your changes do not affect any applications or any service requests currently associated with the contact. Your changes do, however, affect any new applications and new service requests that users create and associate with the contact.

### To edit a reference contact

1. Navigate to the Contacts portlet.

Civic Platform displays a list of reference contacts.

2. Use search to locate the contact you want to modify, then click the link for that contact to view the contact details. See [Using the Search Features](#) for information about conducting a search in Civic Platform.

Civic Platform displays the contact details on the record tabs.

3. Modify the fields as needed. See [Contact Detail](#) for field definitions.

4. Click **Submit**.

## Adding Also Known As Names of a Contact

You can add additional (also known as, or AKA) names for a contact into Civic Platform. For example, when a person changes his/her surname upon marriage, you can add the maiden name as an 'also known as' name. You can delete names from this list as well using the Delete button.

### To add an Also Known As name for a reference contact

1. Navigate to the Contacts portlet.

Civic Platform displays a list of reference contacts.

2. Select the Also Known As tab.

Civic Platform displays the Also Known As list portlet.

3. Click **Add**.

Civic Platform displays a new row on the Also Known As list portlet.

First Name	Middle Name	Last Name	Full Name	Start Date	End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Complete the fields with available data.

5. Click **Save**.

Civic Platform saves the Also Known As name.

## Managing Contact Addresses of a Contact

You may want to maintain the contact address information for a contact, for example, the mailing address to send mails to, or the home address of the contact.

You can either directly create a contact address for a contact, or add an existing reference address (including external addresses) as the contact address.

Your administrator can define contact address identifier fields. Civic Platform regards a contact address as duplicate if the address has duplicate identifier field values as an existing active contact address in the same contact, and forbids you from adding it to the contact.

- When Civic Platform synchronizes a record contact with a reference contact, but the record contact has a duplicate contact address, the contact address in the reference contact directly replaces the contact address in the record contact.
- When you add a duplicate contact address to replace the one that you are deactivating, the existing active contact address, instead of the one you are adding, replaces the one that you want to deactivate.
- In previous versions, you may have added duplicate contact addresses. Civic Platform automatically filters duplicate contact addresses when you look up and select contact addresses to add in records.

### Topics

- [Creating a Contact Address for a Contact](#)
- [Adding an Existing Address as a Contact Address](#)
- [Deactivating a Contact Address](#)



## Creating a Contact Address for a Contact

Depending on the configuration by your agency administrators, you can create contact addresses for a contact with different address types, such as home address, mail address, physical address.

### To add a new contact address to a contact

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact detail page.
2. Click the Contact Address tab.  
Civic Platform displays the contact address list page.
3. Click **New**.  
Civic Platform displays the contact address fields.
4. If needed, check to see whether validation is required for your new address. Otherwise, skip to the next step.
  - a. Check whether the **Validate** button displays in the Contact Address tab.  
Even if this button is available, your agency may require you to validate only certain types of contact addresses against an external address source.
  - b. Specify the address type and country/region of the address, and then click **Validate**.  
One of three messages displays:  
 “Address validation is required” means that the address requires validation.  
 “No validation data source is defined” means that you are creating an address that requires no validation.  
 “Failed to connect to the validation data source” means that the address requires validation but Civic Platform cannot connect to the validation source.
5. Complete the remaining fields with available data. See [Contact Address Fields](#) for field definitions.
6. If the address you are adding requires validation, do the following:
  - a. Click **Validate**.  
Civic Platform displays a list of matching addresses from the external validation source.
  - b. If you use to add an address from the list, select that address and click **Select**.  
Civic Platform populates the contact address fields with the information from the selected address, and sets the Validated field to Yes.
  - c. If you do not want to accept any of the validated addresses as correct, click **Cancel**.  
Civic Platform sets the Validated field of the address to No.
7. Click **Submit**.  
Civic Platform displays the newly-created contact address in the contact address list page.

## Adding an Existing Address as a Contact Address

Your agency administrator may allow you to add an existing reference address (including external address) as the contact address for a contact.



### Note:

Changes you make in contact addresses do not update reference addresses.

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### To add an existing address as contact address

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact detail page.
2. Click the Contact Address tab.  
Civic Platform displays the contact address list page.
3. Click **Look Up**.  
Civic Platform displays the Address detail page.
4. Enter search criteria in the address fields, then click **Submit**.  
Civic Platform displays the results from the search.
5. Select the addresses that you want to add, and click **Select**.  
Civic Platform adds the selected address in the contact address list page.
6. Click the Contact Address ID link for your newly-added address.
7. Complete any blank fields with available data (see [Contact Address Fields](#)).
8. Click **Save**.
9. Repeat [Click the Contact Address ID link for your newly-added address](#) through step 8 for each contact address you want to update.

### Deactivating a Contact Address

You cannot delete contact addresses. However, if a contact address becomes obsolete, you can change its status to inactive.

#### To deactivate a contact address

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact detail page.
2. Click the Contact Address tab.  
Civic Platform displays the contact address list page.
3. Select the contact address you want to deactivate.
4. Click **Deactivate**.  
Civic Platform prompts you to enter the end date.

End Date

Please confirm the deactivation date (end date) of the address.

03/17/2013 Clear

OK Cancel

If the contact address you want to deactivate is the primary contact address in one or more records, you must define a new contact address and specify the end date for the selected address.

Deactivate Contact Address

Menu ▾ Submit Validate Reset Cancel Help

You are required to define a new contact address to replace the one being deactivated, because one or more records use it as the primary contact address.

Please confirm the deactivation date (end date) of the address.  
 Clear

Please define a new contact address below to replace the one serving as the primary contact address in existing records.

<b>Address Line 1</b> <input type="text"/>	<b>Full Address</b> <input type="text"/>	<b>State</b> --Select-- ▾	<b>Unit Type</b> --Select-- ▾
<b>Address Line 2</b> <input type="text"/>	<b>House # Alpha (end)</b> <input type="text"/>	<b>Status</b> Active	<b>Validated</b>
<b>Address Line 3</b> <input type="text"/>	<b>House # Alpha (start)</b> <input type="text"/>	<b>Street # (end)</b> <input type="text"/>	<b>ZIP Code</b> <input type="text"/>
<b>Address Type</b> * Mailing Address	<b>Level # (end)</b> <input type="text"/>	<b>Street # (start)</b> <input type="text"/>	
<b>City</b> <input type="text"/>	<b>Level # (start)</b> <input type="text"/>	<b>Street Name</b> <input type="text"/>	
<b>Contact Address ID</b>	<b>Level Prefix</b> <input type="text"/>	<b>Street Prefix</b> <input type="text"/>	

5. Enter the end date to deactivate the selected contact address.

6. If required, complete the form to define a new contact address to replace the deactivated primary address. For information on defining a new contact address, see [Creating a Contact Address for a Contact](#).

7. Click **Submit**.

Civic Platform deactivates the selected contact address. If you define a new contact address, Civic Platform adds the new contact address to the current contact and the record contact(s) which used the selected contact address as primary.

## Managing Attachments Associated with a Contact

The Documents tab for a contact lists all associated attachments. You can download and view an attachment, upload additional attachments, assign ACA permissions to the attachments, or remove an unnecessary attachment preconditioned that the attachment is not associated with a record.

After you add a document to a contact, you can look up the document and add it to the record which is associated with the contact. For more information, see [Looking Up People Attachments to Associate with Records](#). Note that after you add a document from a contact to one or more records, Civic Platform forbids you from deleting the documents in the contact.

To download multiple documents, choose the documents and click **Manage Documents > Download**. Note that the Civic Platform administrator must grant Upload and Download permission on the Administration > Agency Profile > Security Policy > EDMS Access Security > {EDMS-Name} to enable multiple document downloads.

To print multiple documents, choose the documents and click **Manage Documents > Print**. Note that the **Print** option only shows if the Civic Platform administrator has configured FID 8508 Print Multiple Documents with Full Access.

For more information, see [Attachments](#).

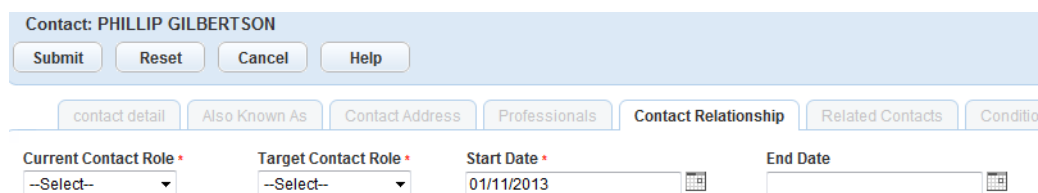
## Building Relationships between Reference Contacts

Building relationships between reference contacts enables you to set up a contact network in Civic Platform. For example, an individual can be the CEO of an organization (contact), the manager of his team, and at the same time, the client of his lawyer. You can add associated reference contacts to an individual contact, and define the roles each one plays for the other in every association.

The reference contact relationship is a network (instead of a hierarchical tree). The relationship that you set up for two reference contacts has nothing to do with other contacts. You can configure the relationship between two reference contacts in the Contact Relationship tab of one contact, and view the relationship in both the contact details.

### To manage contact relationship for a reference contact

1. Navigate to the Contact portlet and select the contact with which you want to work.  
Civic Platform displays the Contact detail page.
2. Click the Contact Relationship tab.  
Civic Platform displays the contact relationship list page.
3. To filter the contact relationship list.
  - a. Enter one or more filter criteria.
  - b. Click **Filter**.  
Civic Platform filters the relationship list.
4. To relate one or more reference contacts with the current contact:
  - a. Click **Look Up**.  
Civic Platform displays the contact search page.
  - b. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform returns a list of reference contacts that meet the search criteria.
  - c. If the search results do not contain the contact(s) you want to add, click **Close Matches** to retrieve close match contacts.
  - d. Select the contact(s) you want to relate with the current contact, and then click **Select**.  
Civic Platform displays the contact role setting portlet.



- e. Enter the relationship details.
  - f. Click **Select**.  
Civic Platform adds the new relationship into the relationship list for both the current contact and the target contact.
5. To edit an existing relationship:
  - a. Click the link at the Current Contact Role column of the relationship.  
Civic Platform displays the contact role setting portlet.

- b. Update any of the fields that display, and click **Submit**.  
Civic Platform updates the selected relationship.
6. To delete or deactivate an existing relationship:
  - a. Select the contact relationship that you want to remove or deactivate.
  - b. Click **Delete** to delete the contact relationship, or **Deactivate** to deactivate it.  
If you delete a relationship, the relationship list no longer displays the relationship.  
If you deactivate a relationship, the relationship list still displays the relationship, but the relationship status becomes Inactive.

## Merging Contacts

If your agency enables merge functionality, (see 0322-Reference Merge Contacts in the *Civic Platform Configuration Reference*), you can select multiple contacts, select a target contact, select contact associations, and merge the contacts and their associations in the selected target contact. After you merge contacts, the target contact remains, and all the other source contacts become disabled.

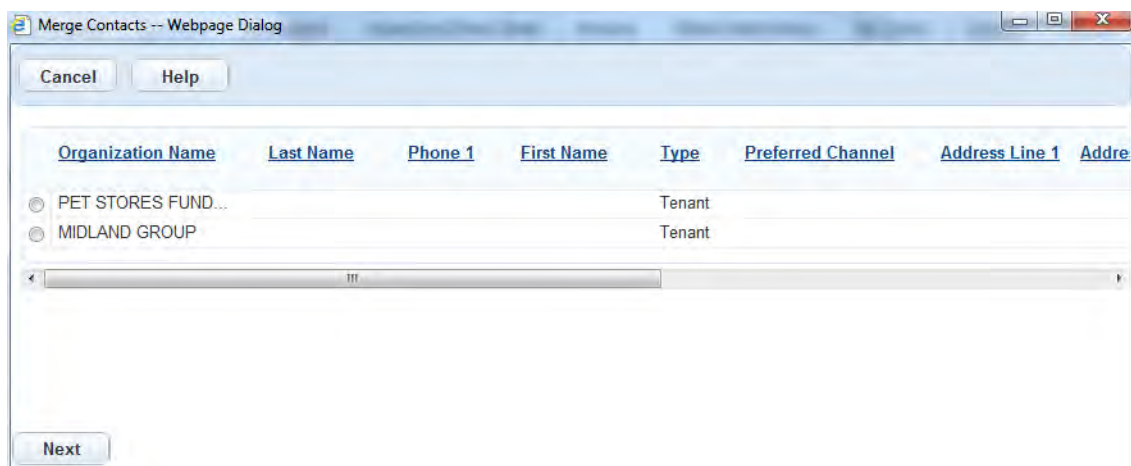


### Note:

Merging contacts is a permanent action. However, Civic Platform does not delete the source contacts. The contacts are merely disabled. You may be able to restore disabled contacts. See your system administrator.

### To merge contacts

1. Navigate to the **Contact** portlet.  
Civic Platform displays the Contact detail page.
2. Select at least two enabled contacts that you want to merge. Note that you may not merge individual contacts with organization contacts.
3. Click **Merge**.  
Civic Platform displays the list of contacts that you just selected.



4. Select the contact that you want to define as the target contact, and then click **Next**.

**Note:**

The **target contact** is the contact to which you want to append the information from the other contacts. It is the contact you want to keep.

All the contacts that you select for merging are **source contacts**. All the source contacts except the target contact become disabled after the merge occurs.

Civic Platform displays the Merge Contact Data dialog.

5. Use the links in the dialog to review and select the information and associations that you want to include in the target contact.

- **Contact Details**

This link displays the information about the contact you selected. You must select a contact type and then confirm the other fields.

- **Also Known As**

This link lists all the also-known-as names of all the source contacts. You can select the also-known-as names you want to add to the target contact.

- **Contact Addresses**

This link is available if you can access the contact addresses tab ([Managing Contact Addresses of a Contact](#)). Click the link to display the contact addresses of all the source contacts. By default, Civic Platform uses the contact addresses of the contact you selected to merge to the target contact. You can select more if you want.

- **Licenses**

This link lists all the licensed professionals associated with the source contacts. By default, Civic Platform selects all the licensed professionals to merge to the contact. You deselect any licensed professionals that you do not want to merge.

- **Conditions**

This link lists the conditions for all the source contacts. By default, Civic Platform selects only the conditions for the contact you selected to merge to the target contact. You can select more if you want.

- **Activities**

This link lists the activities logged in all the source contacts. By default, Civic Platform selects only the activities in the contact you selected in [Select the contact that you want to define as the target contact, and then click Next.](#) to merge to the target contact. You can select more if you want.

- **Public Users**

This link lists the public users associated with all the source contacts. By default, Civic Platform selects only the public user associated with the contact you selected to merge to the target contact. You can select more if you want.

After merging, source contacts become disabled and they lose their association with public users. Some public users may find their account dissociated with all contacts. If this happens, the public user account becomes disabled, and the public user receives an email notification on the change.

- **Assets**

This link lists the assets associated with all the source contacts. By default, Civic Platform selects only the assets associated with the contact you selected to merge to the target contact. You can select more if you want.

**6. Click **Finish** to merge the contacts.**

Civic Platform merges the selected information into the target contact, and disables the other source contacts.

Civic Platform directly merges all the documents from the source contacts to the target contact. If a record is associated with a source contact, the record attachments list still displays the document that users add to the record from the source contact, and the people attachments list of the record displays that the document is associated with the target contact.



**Note:**

A document may fail to be merged if the document has duplicate file name with one in the target contact, or the credentials provided by the user cannot pass EDMS authentication. The document-merging failure does not affect the overall contact merging result.

---

## Managing Record Contacts

You can associate one or more reference contacts with an application or a service request. You can also create new record contacts by entering details about the contact on the Contacts tab of the record detail form portlet. Depending on your user privileges, you may also be able to look up a contact from your reference database and simply add the contact information that way.

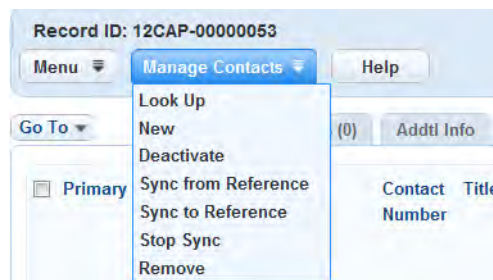
The Manage Contacts menu on the Contacts tab provides you with a list of actions that you can perform on one or more records. For example, you can look up contacts to add to a record, add a new contact, and synchronize record contacts with their reference source.

### Topics

- [Accessing the Manage Contacts Menu](#)
- [Adding a Contact from Reference Contacts](#)
- [Adding an Internal User as a Contact](#)
- [Adding a New Contact](#)
- [Editing a Contact on a Record](#)
- [Managing the Synchronization of Contacts](#)
- [Removing or Deactivating a Contact on a Record](#)

### Accessing the Manage Contacts Menu

1. Go to the appropriate portlet, then locate and choose the building permit or the service request you want to work with.  
Civic Platform displays the detail portlet on the record tabs.
2. Click the Contacts tab.  
Civic Platform displays the record contacts list page.
3. Hover your mouse cursor over the **Manage Contacts** button in the toolbar.  
The Manage Contacts menu displays.



4. Left click any option in the menu to select it.

### Adding a Contact from Reference Contacts

You can associate one or more contacts with a record. Depending on your user privileges, you may also be able to look up a contact from your reference database and add all the reference contact information to your record. If you cannot find the reference contact you want to add, you have the option to create the reference contact right away.



## To add a contact to a record from reference contacts

1. On the Contacts tab for the record you are working on, hover over the **Manage Contacts** button ([Accessing the Manage Contacts Menu](#)), then select **Look Up** from the menu.  
Civic Platform displays the contact look-up form.
2. Enter search criteria as needed to find the contact you seek, then click **Submit**. You can search reference contacts by contact standard fields, contact activities, or contact addresses. See [Examining Contact Details](#) for field definitions.  
Civic Platform displays your search results.

Record ID: 12CAP-00000053

Menu ▾ New in Reference Search Close Matches Select Cancel Help

Go To ▾ ◀ Contacts (0) Documents (0) Fee (0) GIS (0) Inspections (0) Owner (1) Parcel (0) ▶▶

<input type="checkbox"/>	Type	Organization Name	First Name	Last Name	Phone 1	Preferred Channel	Condition
<input type="checkbox"/>	Arch...	Space Matters	Geroge	Bennett			
<input type="checkbox"/>	Arch...	Urban Vision	Monty	Lee			
<input type="checkbox"/>	Engi...	Henry Lopez and...	Henry	Lopez			
<input type="checkbox"/>	Arch...	Sanderson Archi...	Clarence	Sanderson			



### Note:

You may have specified the contact type and type in the search criteria. However, Civic Platform ignores the type information when performing the search, because users can add reference contacts of any type to records in various roles (transaction contact types).

3. If the search results contain the contact(s) you want to add, select the contact you want to add and click **Select**.  
Civic Platform adds the contact to the record.
4. If the search results do not contain the contact you want to add, you can click **Close Matches** to retrieve close match contacts (see [Looking for Close Matches](#)).  
You can also click **New in Reference** to create a new reference contact.  
If the selected contact has only one contact address, Civic Platform adds the selected contact to the record with its contact address.
5. If the selected contact has multiple contact addresses, you can select which contact addresses to add in the pop-up Contact Address Look Up Form and then click **Select**.

Select Deactivate Cancel Help

Select All

Contact

Michael York

Contact Address

Address Type	Recipient	Address
<input type="checkbox"/> Home	Miss Anderson	San Ramon, CA
<input checked="" type="checkbox"/> Office	Miss Lopez	York Street, New York

Civic Platform adds the selected contact in the record contact list.

6. Change the contact type for the newly-added contact as needed. For more information, see [Editing a Contact on a Record](#).

## Adding an Internal User as a Contact

Depending on your user privileges, you may be able to look up an internal user on your staff and associate that user as a contact on a record.



### Note:

Enable FID 8506 - Internal User, to make the Look Up Staff command 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.

Once added, you can configure that contact to receive email notifications and updates for that record. This gives internal staff such as case workers, investigators, or inspectors the ability to stay on top of a case as it moves through its life cycle.

### To add an internal user as a contact on a record

1. Open the record you want to work with, and navigate to the Contacts section.
2. Hover on the **Manage Contacts** button to display a command menu.
3. Select **Look Up Staff**.
4. Enter search criteria to locate the staff member you want to add.
5. Click **Submit**.  
The search results display.
6. Select the contact you want from the results list.
7. Click **Select**.  
A contact form displays. Some of the internal user's data displays.
8. Complete the rest of the form with available data.
9. Click **Submit**.  
The new contact is added to the record.

## Adding a New Contact

You can add contacts manually to a record. Some agencies restrict users from adding certain types of transactional contacts, preferring that you add them as reference contacts instead. But for cases where transactional contacts are permissible, you can manually add new contacts to a record without creating a reference contact.

### To add a new contact to a record

1. On the Contacts tab for the record you are working on, hover over the **Manage Contacts** button ([Accessing the Manage Contacts Menu](#)), then select **New**.  
Civic Platform displays the new contact form.
2. Enter available data in the contact fields. See [Contact Detail](#) for field definitions.
3. In the Contact Address sub section, add the address information for the contact.
4. If you selected a contact type that you are allowed to create transactional contacts for, click **Submit**.  
Otherwise, go to the next step.  
Civic Platform adds the contact as a transactional contact to the record.
5. If you selected a contact type that can only be added as a reference contact, click **Submit**:

Civic Platform displays a list of reference contacts matching the information that you entered.

Type	Organization Name	First Name	Last Name	Phone 1	Preferred Channel	Condition
Arch...	Space Matters	Geroge	Bennett			
Arch...	Urban Vision	Monty	Lee			
Engi...	Henry Lopez and...	Henry	Lopez			
Arch...	Sanderson Archi...	Clarence	Sanderson			

6. You can proceed in one of three ways:

- Select a contact from the search results, then click **Select**.
- Click **Close Matches** to retrieve more close match contacts, select a contact from the new list, and then click **Select**.
- Click **New in Reference** to create a new reference contact, complete the fields in the new contact form, and click **Submit**. Once done, you can select the contact you just created, and click **Select**. Civic Platform adds the reference contact to the record.

## Editing a Contact on a Record

You can edit contact information on an application or a service request record as needed.

### To edit a contact on a record

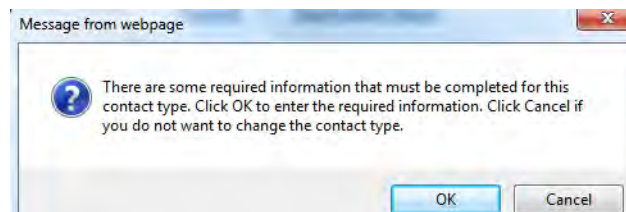
1. Go to the Contacts tab for the record you are working on.  
Civic Platform displays a list of contacts associated with the record.
2. If you want to change the contact type, select a type from the **Type** drop-down list.  
Civic Platform updates the record contact with the new type.



#### Note:

Different contact types may require different contact template fields and contact addresses. If you change the type, you may lose the template fields and the contact addresses that Civic Platform associated with the old type.

If Civic Platform requires template fields for the new contact type, Civic Platform prompts you to enter the required information. Click **Yes** to continue. and go to [Edit any of the fields that display in the Contact Detail section](#). See [Contact Detail for a list of field descriptions](#). to complete the required information.



3. If you want to edit the contact or contact address details, click the **Contact Number** link for the contact.  
Civic Platform displays the contact details.

4. Edit any of the fields that display in the Contact Detail section. See [Contact Detail](#) for a list of field descriptions.
5. Click **Submit**.

## Managing the Synchronization of Contacts

When you add a record contact by looking up a reference contact ([Adding a Contact from Reference Contacts](#)), the record contacts list provides a Reference Contact ID column and a Sync column. The Sync column indicates whether a record contact is in sync with its reference or not. For each individual record contact, you can choose to synchronize it from or to its reference contact, or you can choose to break the synchronization.

If you added a contact as a transactional contact, there is no corresponding reference contact, so the Reference Contact ID column is null, and the Sync column value is No. However, you can still look up a reference contact and synchronize the reference contact with the record contact. After synchronization, the record contact links with the reference contact in the same way as the contact that you add to a record from reference.



### Note:

The best practice when adding a contact to a record is to search for and select a contact from existing reference contacts. This method enables you to save time by applying the reference contact information to the record. You can also avoid duplicate contact information in the database.

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## Topics

- [Synchronizing a Record Contact from its Reference](#)
- [Synchronizing a Record Contact to its Reference](#)
- [Stopping Synchronization between a Record Contact and its Reference](#)

## Synchronizing a Record Contact from its Reference

Record contacts may not be as current as reference contacts. If a record contact is currently not in sync with the reference, you can the record contact data with the more current reference contact information.

### To synchronize a record contact from its reference

1. Go to the Contacts tab for the record you are working on.  
Civic Platform displays a list of contacts associated with the record.
2. Select the contact you want to synchronize from its reference. You can only synchronize one record contact at a time.
3. Hover over the **Manage Contacts** button, and select **Sync from Reference**.  
If Civic Platform already associates the record contact with a reference contact, Civic Platform synchronizes the record contact with the reference contact.  
If Civic Platform does not yet associate the record contact with a reference contact, you must select the reference contact to synchronize. Complete the following steps:
  - a. In the reference contact lookup form, enter search criteria as needed to find the contact you seek, then click **Submit**. You can search reference contacts by contact standard fields, contact template fields, contact activities, or contact addresses. See [Contact Detail](#) and [Contact Address Fields](#) for field definitions.  
Civic Platform displays your search results.

- b. If the search results do not contain the contact you want to find, click **Close Matches** to retrieve close match contacts. For more information on close match search, see [Looking for Close Matches](#).
- c. Select the contacts you want to synchronize to the record contact and then click **Select**.  
Civic Platform synchronizes the record contact with the reference contact.

After the synchronization:

- The record contact stays in synchronization with the reference contact.
- The Sync column of the record contact changes to Yes.
- If the previous record contact contains some contact addresses, Civic Platform adds the contact addresses to the reference contact while also keeping them in the record contact. For more information on contact addresses, see [Managing Contact Addresses of a Contact](#).
- The contact template fields in the selected reference contact may be different from the contact template fields in the current contact role in the record. If some template fields are common to both, Civic Platform copies the values in the fields from the reference contact to the record contact. If some template fields are unique in the reference contact, the fields remain hidden in the record contact.

## Synchronizing a Record Contact to its Reference

After you update a record contact, if the record contact is currently not in sync with the reference, you may want to synchronize the information to its reference contact.

### To synchronize a record contact to its reference

1. Go to the Contacts tab for the record you are working on.  
Civic Platform displays a list of contacts associated with the record.
2. Select the contact you want to synchronize to its reference. You can only synchronize one record contact at a time.
3. Hover over the **Manage Contacts** button, and select **Sync to Reference**.

If Civic Platform already associates the record contact with a reference contact, Civic Platform synchronizes the record contact with the reference contact.

If Civic Platform does not yet associate the record contact with a reference contact, you must select or create a reference contact to synchronize. Complete the following steps:

- a. In the reference contact lookup form, enter search criteria as needed to find the contact you seek, then click **Submit**. You can search reference contacts by contact standard fields, contact activities, or contact addresses. See [Contact Detail](#) and [Contact Address Fields](#) for field definitions.  
Civic Platform displays your search results.
- b. If the search results do not contain the contact you want to find, click **Close Matches** to retrieve close match contacts. For more information on close match search, see [Looking for Close Matches](#).
- c. To synchronize the record contact to an existing reference contact, select the contact you want to synchronize the record contact to and click **Select**.  
Civic Platform synchronizes the transactional contact to the reference contact.
- d. To synchronize the record contact to the reference as a new reference contact, click **New in Reference** to create a new reference contact. After you complete the fields in the popup Contact New Form, click **Submit**.

**Note:**

The standard contact fields display as read-only in the contact new form, with the values populated from the record contact.

If some template fields are common in the record contact and the reference contact, the template fields are editable in the contact new form, with the values populated from the record contact.

Do not edit the values, because when Civic Platform synchronizes the existing information from the record contact to the new reference contact, your changes get overwritten.

---

Civic Platform creates the new reference contact as specified, and associates it with the record contact.

After the synchronization:

- The record contact information synchronizes to the reference contact.
- The record contact stays in synchronization with the reference contact. Civic Platform synchronizes the change in either side to the other side.
- The Sync column of the record contact changes to Yes.
- If the previous record contact contains some contact addresses, Civic Platform adds the contact addresses to the reference contact while also keeping them in the record contact. For more information on contact addresses, see [Managing Contact Addresses of a Contact](#).

## Stopping Synchronization between a Record Contact and its Reference

You can choose not to synchronize the information between a record contact and its reference source.

### To stop synchronization between a record contact and its reference

1. Go to the Contacts tab for the record you are working on.  
Civic Platform displays a list of contacts associated with the record.
2. Select the contact you want to synchronize to its reference. You can only synchronize one record contact at a time.
3. Hover over the **Manage Contacts** button, and select **Stop Sync**.  
Civic Platform changes the Sync field to No for the record contact.

## Removing or Deactivating a Contact on a Record

If you remove a contact from the record Contacts tab, the contact no longer displays in the record contacts list. If you deactivate a contact, the contact still displays in the record contacts list, and the contact status becomes Inactive.

### To remove or deactivate a record contact

1. Go to the Contacts tab for the record you are working on.  
Civic Platform displays a list of contacts associated with the record.
2. Select the contact you want to remove or deactivate.
3. **To remove the contact**
  - a. Hover over the **Manage Contacts** button.
  - b. Select **Remove**.

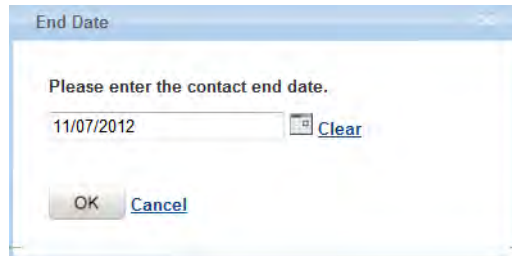
Civic Platform removes the contact.

**To deactivate the contact**

a. Hover over the **Manage Contacts** button.

b. Select **Deactivate**.

Civic Platform displays a pop-up End Date window.

A screenshot of a Windows-style dialog box titled "End Date". The dialog box has a light blue border and a white background. Inside, the text "Please enter the contact end date." is displayed. Below this text is a text input field containing the date "11/07/2012". To the right of the input field is a small square icon with a white 'X' and the text "Clear" in blue. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel". The "Cancel" button is highlighted in blue.

c. Enter the contact end date, and then click **OK**.

Civic Platform sets the contact End Date to the specified date, and changes the contact status to Inactive.

## Viewing Related Contacts

Building relationships among contacts can help streamline communication between different departments in your agency. For example, if two individuals are both employees of a business, associating the two individuals makes it more efficient to handle the contacts of the business.

You do not need to associate contacts with other contacts manually. When you create a record for a business and add all of the employees of that business to the record as contacts, the relationships between the individuals establish automatically.

### EXAMPLE:

John is the owner of Starbucks #2 and he is an individual contact in Civic Platform. The Related Contacts tab for John lists 9 items:

- John himself (owner of Starbucks #2)
- Starbucks HQ
- David (owner of Starbucks HQ)
- Eddy (shareholder of Starbucks HQ)
- James (attorney of Starbucks HQ)
- Amy (original owner of Starbucks #1)
- Mike (current owner of Starbucks #1)
- James (attorney of Starbucks #1)
- James (attorney of Starbucks #2)

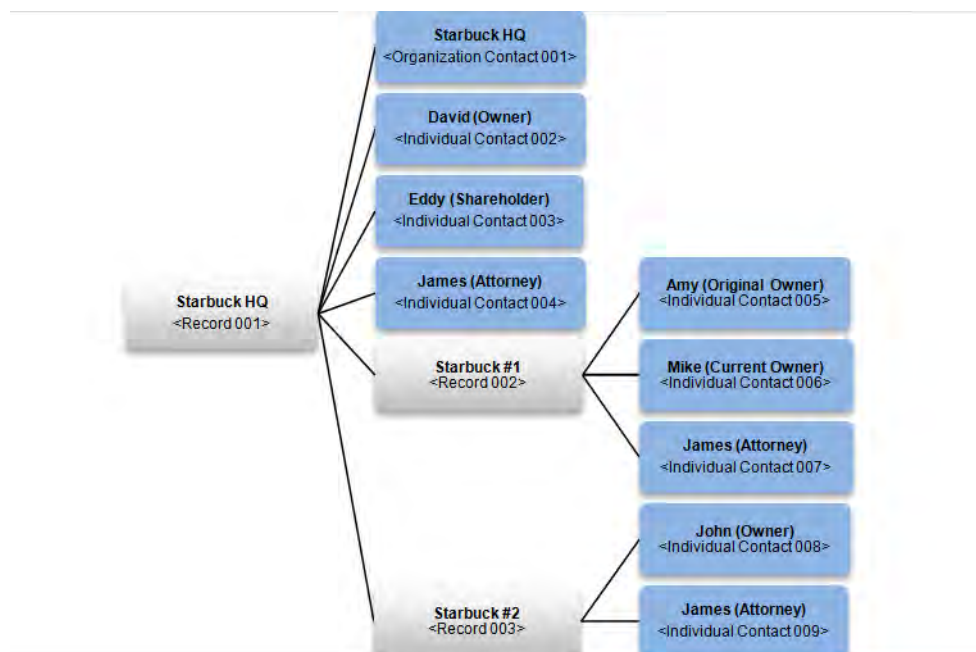


Figure 18: Contact Relationship Illustration

### Topics

- [Viewing Related Contact Information](#)



- [Searching for and Filtering Related Contacts](#)

## Viewing Related Contact Information

The Related Contacts tab for a contact lists all the records that the contact has an association with, along with all other associated contacts for each of those records. You can gain both holistic and historical views of a contact relationship. For example, you can review a list of businesses that a person is both current and historical party to. You can review a list of all individuals within a business and its sub-businesses, and you can review a information about individuals that satisfy multiple roles concurrently.

### To view related contact information

1. Navigate to the Contact portlet.

Civic Platform displays the Contact detail page.

2. Click the Related Contacts tab.

Civic Platform displays the related contacts and businesses list page.

The screenshot shows the 'Contact: Richard Davidson' page with the 'Related Contacts' tab selected. Below the navigation tabs, there are search filters for Record ID, Contact Name, and Contact Type. A table lists related records with columns for Permit ID, Alternate ID, Record Type, Record Type Alias, Application Name, Description, Module Name, and Status Date.

Permit ID	Alternate ID	Record Type	Record Type Alias	Application Name	Description	Module Name	Status Date
<a href="#">13CAP-00000-001H3</a>	<a href="#">13CAP-00001881</a>	Licenses/Ava/People/Multiple Contact	Licenses/Ava/People/Multiple Contact			Licenses	01/27/2013
<a href="#">13CAP-00000-001IN</a>	<a href="#">13CAP-00001936</a>	Licenses/Ava/People/Multiple Contact	Licenses/Ava/People/Multiple Contact			Licenses	01/27/2013

3. Do any of the following:

- To view the details about the related business, click the **Record ID** or **Alternate ID** link for the record that you want to view.

Civic Platform displays the Record detail portlet for the selected business underneath the Related Contacts tab.

- To view the details about the related contact, click the **Contact Number** link next to the contact that you want to view.

Civic Platform displays the Contact detail portlet for the selected contact underneath the Related Contacts tab.

- To view the details about the condition on a related contact, click the **Condition** link next to the contact that you want to view.

Civic Platform displays the Condition detail portlet for the selected contact underneath the Related Contacts tab.

- To view the related records about the related business, complete these options:

1. Locate the Related Records column, and click or hover over the **View** link next to the current record.

Civic Platform provides shortcuts to the parent, child, and sibling records for the current record in a pop-up window.

2. Click a related record link in the pop-up window.

Civic Platform displays the Related Records tab for the current business underneath the Related Contacts tab. Underneath the Related Records tab is the Record detail portlet of the selected record.

## Searching for and Filtering Related Contacts

There are three ways for you to filter the contents of the Related Contacts list portlet.

- You can search for a related contact by standard record field, standard contact field, contact address field, or a combination of the fields that display on the Related Contact search form.
- You can create a QuickQuery and apply it to the Related Contacts list portlet. See [Understanding QuickQueries](#) for more information.
- You can filter the contents of the Related Contacts list by Record ID or Alternate ID, Contact Name, or Contact Type. The Record ID or Alternate ID field only supports exact searches.



**Note:**

You can only filter the contents of the Related Contacts list by a single field.

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## Applying a Condition to a Reference Contact

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If a contact is a reference contact, you can apply a condition to it. When you apply a condition to a reference contact, you set requirements on the reference contact. These requirements must be fulfilled before further actions proceed.

You can create a new condition, or you can also use a standard condition for the reference contact. For detailed information on conditions, see [Conditions](#).

## Viewing Records Associated with a Contact

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You can view all the associated records for a contact, no matter whether the contact is the primary contact of the records or not.

### To view the records associated with a contact

1. Navigate to the Contact portlet and select the contact you want to work with.  
Civic Platform displays the Contact detail page.
2. Click the Record List tab.  
Civic Platform displays the list of records that the contact is associated with.
3. You can use the My QuickQueries functionality to filter the list. You can also select records and create a set from the selected records. For more information about sets, see [Understanding QuickQueries](#) .

## Associating Professionals with a Contact

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Civic Platform allows you to associate or dissociate licensed professionals with a contact at any time. Also, you can synchronize the contact information to its associated licensed professionals. This relationship is particularly useful when several licensed professionals all belong to the same contact (for example, an organization contact), and the licensed professionals share the same contact information with the contact.

### Topics

- [Adding Licensed Professionals to a Contact](#)
- [Synchronizing Contact Info to Associated Professionals](#)

### Adding Licensed Professionals to a Contact

You can associate one or more licensed professionals with a contact. You can access data about an associated licensed professional directly from the Contact portlet. You can also click the licensed professional link to navigate to the Professionals portlet.

#### To search for a licensed professional and associate it with a contact

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact detail page.
2. Click the Professionals tab.  
Civic Platform displays the associated licensed professionals list page.
3. Click **Look Up**.  
Civic Platform displays the licensed professional search page.
4. Enter the search criteria in the licensed professional fields.
5. Click **Submit**.  
Civic Platform displays the results from the search.
6. Select the licensed professional(s) you want to associate with the contact.
7. Click **Select**.  
Civic Platform associates the licensed professional with the contact.
8. To disassociate a professional from the current contact, select the licensed professional you want to remove, then click **Delete**.

### Synchronizing Contact Info to Associated Professionals

When certain contact information is updated in a reference contact, you can synchronize that information to some or all of its associated licensed professionals. The contact fields subject to synchronization include all the fields common to both the Contact portlet and the Professionals portlet with the exception of the Status field.

#### To synchronize contact information to associated professionals

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact list page.
2. Click the Professionals tab.  
Civic Platform displays the associated licensed professionals list page.

3. Select the licensed professionals to which you want to synchronize the contact information, and then click **Sync Contact Info**.

Civic Platform synchronizes the contact information for the current contact to all the selected licensed professionals.

## Associating Reference Addresses with a Contact

---

Civic Platform provides the ability to build associations between contacts and reference addresses.

You can directly create a reference address for a contact or add an existing referent address to a contact.

### Topics

- [Creating a New Reference Address for a Contact](#)
- [Associating an Existing Reference Address with a Contact](#)
- [Deleting a Reference Address from a Contact](#)

### Creating a New Reference Address for a Contact

If you create a reference address in the Contact portlet, you can search for and apply the reference address as normal reference address, as if you had created it created in the reference address portlet.

#### To add a new reference address to a contact

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact detail page.
2. Click the Address tab.  
Civic Platform displays the associated address list page.
3. Click **New**.  
Civic Platform displays the address fields.
4. Complete the fields as described in [Table 85: Address Fields](#).
5. Click **Submit**.  
Civic Platform displays the address.

### Associating an Existing Reference Address with a Contact

If a reference address already exists in the system, you can search for it and apply it to a contact.

#### To search for an address and associate it with a contact

1. Navigate to the Contact portlet.  
Many times this portlet may have its own main link or be grouped with the APO portlets.  
Civic Platform displays the Contact detail page.
2. Click the Address tab.  
Civic Platform displays the associated address list page.
3. Click **Look Up**.  
Civic Platform displays the Address detail page.
4. Enter the search criteria in the address fields. For the field description, see [Table 85: Address Fields](#)
5. Click **Submit**.  
Civic Platform displays the results from the search.
6. Select the address you want to associate with the contact.

7. Click **Select**.

### **Deleting a Reference Address from a Contact**

You can delete a reference address from a contact if it no longer applies. When you delete a reference address, you remove the association between the contact and the reference address; however, Civic Platform does not delete the reference address from the database.

#### **To delete a reference address from a contact**

1. Navigate to the Contact portlet.  
Civic Platform displays the Contact list page.
2. Click the Address tab.  
Civic Platform displays the associated address list page.
3. Select the address you want to delete.
4. Click **Delete**.  
Civic Platform deletes the address from the contact.



## Managing Public Users Associated with Contacts

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To enable a public user account, you must associate it with a reference contact. You can directly associate a public user with a contact in the reference contact portlet, and view or edit the public user details there.

**Note:**

If a reference contact is inactive, you cannot associate any public user with the contact. If a reference contact is the only contact associated with an enabled public user, you cannot disable the contact.

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### To manage the association between a contact and a public user

1. Navigate to the Contact portlet and select the contact you want to work with.  
Civic Platform displays the Contact Details.
2. Click the Associated Public User tab.  
Civic Platform displays the Associated Public User list portlet.
3. Do any of the following:
  - To associate a public user with the current contact:
    1. Click **Look Up**.  
Civic Platform displays the public user search form.
    2. Use Search to locate the public user you want to associate.
    3. Enter any search criteria in the appropriate fields. See [Public User Search Fields](#) for field definitions. See [Using the Search Features](#) for more information about searching.
    4. Click **Submit**.  
Civic Platform displays the list of public users that match your search criteria.
    5. Select the public user you want to associate with the contact, and click **Connect**.  
Civic Platform associates the selected public user with the contact.
  - To view and edit a public user associated with the contact.
    1. Click the **Email** field for the public user you want to work with.  
Civic Platform displays the public user detail form.
    2. Update any fields as necessary. See [Public User Search Fields](#) for field definitions.
    3. Click **Save**.  
Civic Platform saves your change.
  - To remove the association of a public user with the contact.
    1. Select the public user from which you want to remove the association.
    2. Click **Delete**.  
Civic Platform removes the association of the public user from the contact.

## Viewing Assets Associated with a Contact

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You can review a read-only list of assets associated with a reference contact via the Assets tab.

**To view assets associated with a contact**

1. Navigate to the Contact portlet and use Search to locate and select the contact you want to work with.  
Civic Platform displays the contact details.
2. Click the Assets tab.  
Civic Platform displays a read-only list of assets associated with the contact.

## Examining Contact Details

The following tables list and define fields that may be available when working with contacts.

- [Contact Detail Fields](#)
- [Contact Address Fields](#)
- [Contact Relationship Fields](#)
- [Public User Search Fields](#)

### Contact Detail Fields

The table below lists and defines fields that may be available as you work with and search for contacts.

Table 27: Contact Detail

<b>Address Line 1 Address Line 2 Address Line 3</b>	The contact's address information. You may have up to three lines of address information.
<b>Birth Date</b>	The contact's birth date. This field is active only when Contact Type = Individual.
<b>Birthplace City</b>	The contact's birthplace city. This field is active only when Contact Type = Individual.
<b>Birthplace Country/ Region</b>	The contact's birth country or region. This field is active only when Contact Type = Individual.
<b>Birthplace State</b>	The contact's birthplace state. This field is active only when Contact Type = Individual.
<b>Business Name 2</b>	If Contact Type = Individual, this is the business, trade, or "doing business as (DBA)" name for the contact.  If Contact Type = Organization, this is the additional business, trade, or "doing business as (DBA)" name for the contact other than the Organization Name, and DBA/Trade Name.
<b>City</b>	The city in which the contact resides.
<b>Contact Number</b>	(Only for contacts associated with records.) An auto-generated ID number that identifies the contact in the record.
<b>Contact Status</b>	For reference contacts, this field indicates the status of the contacts (enabled or disabled). For contacts associated with records, this field indicates the status of the association between the contact and the record.
<b>Contact Type</b>	This field defines the type of entity that is the contact; for example, individual or organization.
<b>Country/Region</b>	The country or region in which the contact resides.
<b>DBA/Trade Name</b>	The contact's preferred business or trade name. This field is active only when Contact Type = Organization.
<b>Deceased Date</b>	The date of death for the contact, if applicable. This field is active only when Contact Type = Individual.
<b>Driver's License Number</b>	The driver's license number of the contact. This field is active only when Contact Type = Individual.
<b>Driver's License State</b>	The driver's license state of the contact. This field is active only when Contact Type = Individual.
<b>Email</b>	The contact's email address.

<b>End Date</b>	(Only for contacts associated with records) The date when the contact is no longer associated with the current record. When this date is earlier than the current date, the status of the contact automatically changes to Inactive.
<b>Fax</b>	The contact's fax number, with Country and Area Code.
<b>FEIN</b>	The Federal Employer Identification Number. This field is active only when the Contact Type = Organization.
<b>First Name</b>	The contact's first name. This field is active only when Contact Type = Individual.
<b>Full Name</b>	The contact's full name. This field is active only when Contact Type = Individual.
<b>Gender</b>	The contact's gender. This field is active only when Contact Type = Individual.
<b>Last Name</b>	The contact's last name. This field is active only when Contact Type = Individual.
<b>Middle Name</b>	The contact's middle name. This field is active only when Contact Type = Individual.
<b>Notify contact with Record update</b>	(Only for contacts associated with records) Indicates whether Civic Platform should notify this contact when the application or service request status changes.
<b>Number (ID)</b>	A unique auto-generated number that identifies this contact in your Civic Platform system.
<b>Notes</b>	Any notes you want to enter for the contact.
<b>Organization Name</b>	The organization to which the contact belongs. This field is active only when Contact Type = Organization.
<b>Passport Number</b>	The contact's passport number. This field is active only when Contact Type = Individual.
<b>Permissions</b>	Indicates the level of access by the contact to associated records in Citizen Access. Options include: <b>Full</b> (full access), <b>Schedule Inspections Only</b> (read-only access in the My Record list and Record search result list in Citizen Access plus ability to schedule inspections), <b>Read</b> (read-only access in the My Record list and the Record search result list in Citizen Access, and <b>None</b> (no access).
<b>Phone 1, Phone 2, Phone 3</b>	The contact's phone number(s).
<b>P.O. Box</b>	The contact's post office box number.
<b>Preferred Channel</b>	The method by which the contact prefers to receive notification; for example by phone, email, fax, or postal mail.
<b>Race</b>	The contact's race/ethnicity.
<b>Reference Contact ID</b>	An auto-generated ID number that identifies the reference contact in Civic Platform.
<b>Relationship</b>	The contact's relationship to the application or the service request.
<b>Salutation</b>	Salutation to use when addressing the contact; for example Mr. or Ms. This field is active only when Contact Type = Individual.
<b>SSN</b>	The contact's Social Security Number. This field is active only when Contact Type = Individual.
<b>Start Date</b>	(Only for contacts associated with records) The date when the contact becomes associated with the current record. This field defaults to the date when you add the contact to a record.
<b>State</b>	The state in which the contact resides.
<b>State ID Number</b>	The contact's state ID number. This field is active only when Contact Type = Individual.
<b>Suffix</b>	This is the suffix to a contact name, such as: Jr., Sr., or PhD.

<b>Sync</b>	(Only for contacts associated with records) Indicates whether the record contact is in sync with its reference source contact.  <b>Yes</b> indicates that the following information for the record contact is in sync with its reference source: standard field values (except for Contact Type, Start Date, End Date, and Contact Status), template field values common to both, and contact addresses.  <b>No</b> indicates that only the contact addresses for the contact are in sync with its reference source, or that a record contact has no reference source.
<b>Title</b>	The contact's business title. This field is active only when Contact Type = Individual.
<b>Type</b>	The type of contact. Civic Platform uses contact types to group contacts with similar functions.
<b>Zip</b>	The contact's zip code.

## Contact Address Fields

The table below lists and defines fields that may be available as you work with contact addresses.

Table 28: Contact Address Fields

<b>Address Line 1/2/3</b>	The primary/secondary/tertiary line of the contact address.
<b>Address Type</b>	The contact address type. Your agency administrator configures the address type. Examples include home address or mail address.
<b>City</b>	The city where the contact resides.
<b>Contact Address ID</b>	The system-generated sequence ID for the current contact address.
<b>Country/Region</b>	The country/region where the contact resides.
<b>Direction</b>	The street direction designation of the primary address line in the contact address. For example, "N" as in "North" Main Street."
<b>End Date</b>	The date when the contact address ceases to be active.
<b>Fax</b>	The fax number of the contact address, with Country and Area code.
<b>Full Address</b>	The full address of the contact address.
<b>House # Alpha (end)</b>	The ending street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the address is "10-23 WHITESTONE," "23" is the ending street number.
<b>House # Alpha (start)</b>	The beginning street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the address is "10-23 WHITESTONE," "10" is the beginning street number.
<b>Level # (end)</b>	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level # (start)</b>	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level Prefix</b>	The prefix for the level numbers (floor numbers) that make up the address.
<b>Phone</b>	The phone number of the contact address, with Country and Area code.
<b>Primary</b>	Indicator that this address is the primary contact address. Only one contact address can be the primary address at any given time.
<b>Recipient</b>	The contact person for the contact address.
<b>Start Date</b>	The date when the contact address starts to be active.
<b>State</b>	The state where the contact resides.
<b>Status</b>	The status of the contact address:

<b>Street # (end) Street # (start)</b>	The street number(s) of the address associated with the contact. If the address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Otherwise, you can specify a singular street number in either field. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.
<b>Street Name</b>	The street name of the primary address in the contact address.
<b>Street Prefix</b>	The street prefix of the primary address in the contact address.
<b>Street Suffix (Direction)</b>	The street suffix of the primary address in the contact address.
<b>Street Type</b>	The street type of the primary address in the contact address. For example, Street, Boulevard, or Lane.
<b>Unit # (end) Unit # (start)</b>	The unit range of the primary address in the contact address.
<b>Unit Type</b>	The unit type designation of the primary address in the contact address. Enter the unit type of the location. For example, enter CONDO, APT, or SUITE.
<b>Validated</b>	Displays whether the contact address Accela Civic Platform has validated the address against an external address source.
<b>ZIP Code</b>	The ZIP code of the contact address.

## Contact Relationship Fields

The table below lists and defines fields that may be available as you work with contact relationships.

Table 29: Contact Relationship Detail

<b>Current Contact Role</b>	The role that the current contact plays for the contact you just selected.
<b>Target Contact Role</b>	The role that the contact you just selected plays for the current contact.
<b>Start Date</b>	The date when the relationship starts.
<b>End Date</b>	The date when the relationship ends.
<b>Relationship Status</b>	The current status of the relationship. It is active or inactive.

## Public User Search Fields

The table below lists and defines fields that may be available as you search for Public Users.

Table 30: Public User Search Fields

<b>Address</b>	The public user's address.
<b>Business Name</b>	The public user business name, if applicable.
<b>Cell Phone</b>	The public user's cellular phone number.
<b>City</b>	The public user's city of residence.
<b>Confirm Password</b>	The public user's password. This field is a second entry of the password for verification.
<b>Email</b>	The public user's email address. By default, this is the User ID.
<b>Fax</b>	The public user's fax number.
<b>First Name</b>	The public user's first name.
<b>Home Phone</b>	The public user's home telephone number.
<b>Last Name</b>	The public user's last name.
<b>Middle Name</b>	The public user's middle name.

<b>Pager</b>	The public user's pager number.
<b>Password</b>	The public user's password used when logging in to Citizen Access.
<b>Password request answer</b>	The answer to the password request question.
<b>Password request question</b>	Password request question. If a public user forgets his password, he can answer this question. If the answer is correct, Civic Platform sends an email with the password to the email address provided from registration.
<b>Preferred Contact Channel</b>	The preferred method to use when contacting the public user. For example, email, phone, fax, or mail.
<b>Preferred Phone</b>	The public user's preferred phone number.
<b>State</b>	The public user's state of residence.
<b>User ID</b>	The user ID for logging in to Citizen Access. The default User ID is the email address provided in registration. You can modify this field.
<b>User Role</b>	Defines whether the public user is a Citizen User or an Admin User. Admin users have the ability to perform administrative tasks in Citizen Access.
<b>Work Phone</b>	The public user's work telephone number.
<b>Zip</b>	The public user's zip code.

## Licensed Professionals

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Choose a topic from the list below to learn more about working with licensed professionals.

### **Related Information**

[Licensed Professionals Overview](#)

[Adding a Reference Professional](#)

[Associating Records and Licensed Professionals](#)

[Editing Information about a Reference Professional](#) ♦

[Adding a New Professional from the Record Detail Portlet](#)

[Disassociating a Professional from a Record via the Record Detail Portlet](#)

[Managing Public Users Associated with a Professional](#)

[Managing Attachments Associated with a Professional](#)

[Examining Licensed Professional Details](#)



## Licensed Professionals Overview

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A licensed professional is an individual holding a business license. Your agency may have an official list of professionals with business licenses from the state licensing board. You can use this list as a reference when associating a professional with an application or a service request. You can also add and edit reference professional records manually in the database. You can add conditions (see [Conditions](#)), and you can associate records to professionals.

## Adding a Reference Professional

---

You can add new professionals to your reference database. After you add a reference professional, that professional is available to associate with records.

### To add a reference professional

1. Navigate to the Professionals portlet.  
Civic Platform displays a list of reference professionals.
2. Click **New**.  
Civic Platform displays the professional intake form.
3. Complete the fields with available data. See [Professional Detail Fields](#) for field definitions.



#### **Note:**

A licensed professional can have the same license number assigned to multiple license types. However, you must add a new licensed professional record for each license type.

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4. Click **Submit**.

## Associating Records and Licensed Professionals

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You can associate and disassociate licensed professionals to/from a record from the record detail portlet and the Professionals portlet.

### Topics

- [Viewing Associated Records from the Professionals Portlet](#)
- [Associating/Disassociating Records with a Professional via the Professionals Portlet](#)
- [Viewing Licensed Professional Information from the Record portlet](#)
- [Associating Professionals with a Record via the Record Portlet](#)

### Viewing Associated Records from the Professionals Portlet

You can view associated records as needed from the Professionals portlet.

#### To view an application or a service request from the Professionals portlet

1. Navigate to the Professionals portlet.  
Civic Platform displays a list of reference professionals.
2. Use search to locate and select the professional you want to work with.  
Civic Platform displays the professional details on the secondary tabs.
3. On the Professional details portlet, click the Associated Record List tab.  
Civic Platform displays a list of *records* associated with the professional.
4. Click the link to the record that you want to view/edit.  
The Record detail portlet displays.

### Associating/Disassociating Records with a Professional via the Professionals Portlet

You can associate or disassociate records with a given professional from the Professionals portlet.

#### To associate records with a Professional

1. Navigate to the Professionals portlet.  
Civic Platform displays a list of reference professionals.
2. Use Search to locate and select the Professional you want to work with.
3. On the Professional details portlet, click the Associated Record List tab.  
Civic Platform displays a list of records associated with the professional.
4. Click **Look Up**.
5. Enter search criteria as appropriate to locate the records you want and then click **Submit**.  
Civic Platform displays a list of records that match the search criteria.
6. Select the record(s) that you want to associate or disassociate.
7. To associate the record(s) with the current licensed professional, click **Select**.  
Civic Platform adds the selected records to the Associated Record List.

**Note:**

Civic Platform cannot associate a record to a professional if the requested record status is “Denied”. To update the status of the record, see [Deleting Records](#).

8. To disassociate the record(s) from a professional profile, click **Delete**.

**Note:**

Citizen Access users cannot view disassociated records for a licensed professional.

## Viewing Licensed Professional Information from the Record portlet

You can view associated professionals as needed from the Record detail portlet.

### To view licensed professional information from the Record portlet

1. Navigate to the Record list portlet.  
Civic Platform displays a list of records.
2. Use search to locate and select the record you want to work with.
3. Click the Professionals tab in the Record detail portlet.  
Civic Platform displays a list of professionals associated with the current record.
4. Click the License # link for the professional you want to view.  
Civic Platform displays information about the selected professional.
5. You can edit data on this form. Click **Submit** to save your changes.  
Civic Platform saves the modifications to the record.

**Note:**

Modifications apply only to the current record. Reference professional data is not updated. To modify reference professional data, work from the Licensed Professionals portlet.

## Associating Professionals with a Record via the Record Portlet

You can associate one or more reference professionals from with an application or a service request. Information about the professional automatically writes to the record from the database. Afterwards, users can edit the data as needed; however, Civic Platform does not apply the edits to the original reference professional record (See [Editing Information about a Reference Professional](#) for information).

### To associate a professional to a record

1. Navigate to the Records portlet.  
Civic Platform displays a list of records.
2. Use search to locate and select the record you want to work with.  
Civic Platform displays the record detail portlet.
3. Click the Professionals tab in the Record detail portlet.  
Civic Platform lists any existing professionals already added to the record.
4. Click **Look Up** and enter search criteria to locate the professional(s) you want.  
Civic Platform displays the search results.
5. Choose one or more professionals and click **Select**.

6. Click **Submit**.

## Editing Information about a Reference Professional

---

You can modify the reference professional data as needed. Your changes do not apply to existing records currently associated with the professional. They do, however, apply to new records that you create.

### To edit information about a reference professional

1. Navigate to the Professionals portlet by clicking the main link.  
Civic Platform displays a list of reference professionals.
2. Use search to locate and select the professional record you want to modify.
3. Modify data as needed. See [Professional Detail Fields](#) for field definitions.
4. Click **Submit**.

## Adding a New Professional from the Record Detail Portlet

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You can add new professionals to a Record via the Professionals tab of the Record detail portlet. Keep in mind, however, that Accela Civic Platform does not store professionals added from this location in the reference database. To add a new professional to your reference database, see [Adding a Reference Professional](#).

### To add a new professional to a Record

1. Navigate to the Records portlet.  
Civic Platform displays a list of records.
2. Use search to locate and select the record you want to work with.  
Civic Platform displays the record detail portlet.
3. Click the Professionals tab in the Record detail portlet.  
Civic Platform lists any existing professionals already added to the record.
4. Click **New**.
5. Complete the fields with available data. See [Professional Detail Fields](#) for field definitions.
6. Click **Submit**.

## Disassociating a Professional from a Record via the Record Detail Portlet

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You can disassociate a professional from an application or a service request as needed. Doing so removes the association to the record from the Professionals detail portlet as well.

### To disassociate a Professional from a Record

1. Navigate to the Records portlet.  
Civic Platform displays a list of records.
2. Use Search to locate and select the record you want to work with.  
Civic Platform displays the record detail portlet.
3. Click the Professionals tab in the Record detail portlet.  
Civic Platform lists any existing professionals already added to the record.
4. Select the professional(s) you want to disassociate.
5. Click **Delete**.  
Civic Platform updates the professional list.



## Managing Public Users Associated with a Professional

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You can directly associate a public user with a licensed professional in the licensed professional portlet, and view or edit the public details.

### To manage the association between a licensed professional and a public user

1. Navigate to the Licensed Professional portlet and select the licensed professional you want to work with.

Civic Platform displays the Licensed Professional Details.

2. Click the Associated Public User tab.

Civic Platform displays the Associated Public User list portlet.

3. Do any of the following:

- To associate a public user with the current licensed professional:

1. Click **Look Up**.

Civic Platform displays the public user search form.

2. Use Search to locate the public user you want to associate.

3. Enter search criteria in the appropriate fields.

4. Click **Submit**.

Civic Platform displays the list of public users that match your search criteria.

5. Select the public user you want to associate with, and click **Connect**.

Civic Platform associates the selected public user with the licensed professional.

- To view and edit a public user associated with the licensed professional.

1. Click the **Email** field of the public user you want to work with.

Civic Platform displays the public user detail form.

2. Update any fields as necessary.

3. Click **Save**.

Civic Platform saves your change.

- To remove the association of a public user with the licensed professional.

1. Select the public user from which you want to dissociate.

2. Click **Delete**.

Civic Platform removes the association of the public user from the licensed professional.

## Managing Attachments Associated with a Professional

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Use the Documents tab on a licensed professional record to manage all associated attachments. For more information about working with attachments, see [Looking Up People Attachments to Associate with Records](#)

Any attachment associated with a licensed professional record can be added to a record which is associated with that licensed professional. For more information, see [Attachments](#) . Note that after you add a document from a licensed professional to one or more records, Civic Platform forbids you from deleting the documents in the licensed professional.

To download multiple documents, choose the documents and click **Manage Documents > Download**. Note that the Civic Platform administrator must grant Upload and Download permission on the Administration > Agency Profile > Security Policy > EDMS Access Security > {EDMS-Name} to enable multiple document downloads.

To print multiple documents, choose the documents and click **Manage Documents > Print**. Note that the **Print** option only shows if the Civic Platform administrator has configured FID 8508 Print Multiple Documents with Full Access.

If an external inspector uses Citizen Access to upload inspection results in the form of a CSV file, you can find that file in the Documents tab for the licensed professional associated with the inspector.

### To update inspection results according to a CSV file

1. Navigate to the Licensed Professional portlet and select the licensed professional you want to work with.

Civic Platform displays the Licensed Professional Details.

2. Click the Documents tab.

Civic Platform displays the Document list portlet.

3. Select the CSV file that an external inspector uploaded and you have reviewed.

4. Click **Result Inspections**.

Civic Platform updates inspection results based on the contents of the CSV file. If the CSV file contains more than 200 inspections, Civic Platform automatically creates a batch job named Result Inspection with CSV to handle the volume.

After the update process is complete, Civic Platform changes the document status of the CSV file to Executed. Meanwhile, Citizen Access may display an announcement of the update completion to the external inspector if configured to do so. If any inspections failed to update, Civic Platform generates a log file that lists all the failed inspections.

## Examining Licensed Professional Details

The table below lists and defines fields that may be available as you work with Licensed Professionals.

Table 31: Professional Detail Fields

<b>Address</b>	The address information for the licensed professional. You may have up to three lines of address information.
<b>Business License #</b>	The business license number issued to a professional by your agency. A licensed professional can have the same license number assigned to multiple license types, such as Electrical, Mechanical, and Plumbing licenses.
<b>Business License Expiration Date</b>	The date when the business license is due to expire.
<b>Business Name 1</b>	The primary name of the business associated with the professional license.
<b>Business Name 2</b>	The secondary business name in the text field, if applicable.
<b>Contractor Business Name</b>	The contractor business name.
<b>Contractor License Number</b>	The license number of the contractor.
<b>Comp Insurance Company Code</b>	The code associated with the worker's compensation insurance provider for the professional.
<b>City</b>	The city name. You can use the Get City button to choose a city from a list.
<b>Comment</b>	Any comments about the business license or professional.
<b>Display in ACA</b>	Indicates whether to display the professional record in Citizen Access.
<b>Display Inspection in the past # of Days</b>	<p>This field is specific to food facility licenses. A positive integer represents a number of inspection days in the past, starting from the current date, and excluding days that no inspections occur. Civic Platform displays any inspections that occurred in the defined time period.</p> <p>For example, enter "3" into this field. The current date is 1/2/2015. For a specific food facility license, no inspection is scheduled to occur on the current day. The last three inspection-resulting days are listed as 1/1/2015, 1/7/2014, and 1/1/2014, the inspections that occurred in any of these three days display in the Previous Inspection section for that food facility license in Citizen Access.</p>
<b>Email</b>	The email address of the licensed professional.
<b>Fax #</b>	The fax number of the licensed professional.
<b>FEIN</b>	If applicable, enter the federal employer identification number of the licensed professional.
<b>First Name</b>	The first name of the licensed professional.
<b>Insurance Amount</b>	The cost, in dollar amounts, of the professional's insurance policy.
<b>Insurance Company</b>	The name of the company that insures the professional.
<b>Insurance Expiration Date</b>	The date when the insurance policy is due to expire. Click the calendar icon to locate the date using a calendar.
<b>Last Name</b>	The last name of the licensed professional.
<b>License State</b>	Choose the state where the professional business license was issued.
<b>License Expiration Date</b>	Enter the date when the state license is due to expire. Click the calendar icon if you want to use a calendar to locate the date.
<b>License Issue Date</b>	The issue date of the state license. Click the calendar icon to use a calendar to locate the date.
<b>License Last Renewal Date</b>	The last renewal date for the state license. Click the calendar icon if you want to use a calendar to locate the date.
<b>License Type</b>	Choose the type of license held by the professional; for example, Architect, Plumber, or Provider.

<b>Licensing Board</b>	Choose the licensing board. For example, the Louisiana State Licensing Board for Contractors.
<b>Middle Name</b>	The middle name of the licensed professional.
<b>Phone</b>	The phone number of the licensed professional. You can list more than one phone number using the Phone 1, Phone 2, and Phone 3 fields.
<b>Policy #</b>	The insurance policy number of the licensed professional.
<b>SSN</b>	The social security number of the licensed professional.
<b>State</b>	The state where the mailing address is located.
<b>State License #</b>	The official number that identifies the business license as issued by the state and held by the professional.
<b>Status</b>	The current status of this professional record. If you are searching for a professional, use the drop-down list to search for either Disabled or Enabled professionals or both.
<b>Title</b>	The title of the licensed professional.
<b>Workers Comp Exempt</b>	The workers' compensation exemption status.
<b>Workers Comp Expiration Date</b>	The expiration date of the workers' compensation insurance policy.
<b>Workers Comp Policy #</b>	The workers' compensation insurance policy number.
<b>Zip</b>	The zip code of the licensed professional.

## Education and Examination Providers

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Choose a topic from the list below to learn more about working with provider education and examinations.

### **Related Information**

[Adding a Provider](#)

[Associating Examination Subjects with a Provider](#)

[Scheduling an Examination](#)

[Assigning a Proctor to Administer an Examination](#)

[Selecting Examination or Education Records for an Application](#)

[Approving Examination or Education Records](#)

[Working with Registered Records](#)

[Viewing an Examination Calendar](#)

[Adding Examination Sites](#)

[Updating Scores](#)

## Provider Overview

---

You can create education and examination provider records in the Licensed Professional portlet, using license type to identify the different provider types. You can also enter and track information about examinations and examination sites.

## Adding a Provider

When you configure a licensed professional record as an examination provider, Civic Platform enables a Provider tab on the record detail portlet. Define a provider type to indicate the type of education that they offer: education, continuing education, or examination.

### To create a Provider record

1. Navigate to the **Licensed Professional** portlet.

Civic Platform displays the Licensed Professional list portlet.

2. Click **New**.

Civic Platform displays the license professional detail form.

The screenshot shows a web form for adding a provider. At the top, there are buttons for 'Menu', 'Submit', 'Reset', and 'Help'. Below these are several tabs: 'ProfessionalDetail' (active), 'Associated Record List', 'Conditions', 'Activity', 'Comments', and 'Associated Public User'. The form contains the following fields:

- Status \***: A dropdown menu with 'Enabled' selected.
- License Type \***: A dropdown menu with '--Select--' selected.
- License State \***: A dropdown menu with 'AZ' selected.
- Display Inspections in the Past # of Days**: A text input field.
- Business Name**: A text input field.
- Business Name 2**: A text input field.
- First Name**: A text input field.
- Middle Name**: A text input field.
- Last Name**: A text input field.
- City**: A text input field.
- State**: A dropdown menu with '--Select--' selected.
- Country/Region**: A dropdown menu with 'United States' selected.
- Gender**: Radio buttons for 'Female' (selected) and 'Male'.
- E-mail**: A text input field.

3. In the Professional Detail tab, enter the required information about the education provider.

- **License Type** – select **Provider**.
- **Business Name** – enter the name of the educational institution
- **License State** – enter the state where the educational institution is located.
- **Status** – select **Enabled**.
- Complete other fields as needed.

4. Click **Submit**.

Civic Platform creates a new licensed professional record, and adds the Provider tab to the detail portlet.

5. Select the **Provider** tab.

Civic Platform displays the Provider form.

Licensed Professional: State License# 11-PEOP-00019

Menu Submit Reset Help

ProfessionalDetail Associated Record List Conditions (0) Activity (0) Comments (0) Associated Public User (1) Provider

Provider Number  
11-PROVIDER-00003

Provider Name \*  
ONLINE CPA TEST PROVIDER

Provider Type \*  
 Examination Provider  
 Use External URL <https://api.exambuilder.com/{8PtyZNTtaJo2m1n1}:{agPEfrCL4k6Toox3}> \* [Test Connection](#)  
 Continuing Education Provider  
 Education Provider

- If you entered a **Business Name** on the Professional Detail page, the name displays here. You may edit the name as needed.
- Enter a **Provider Number**, if needed. If you leave this field blank, Civic Platform may automatically assign a provider number if configured to do so.



**Note:**

Some agencies configure Civic Platform to auto-generate sequential provider numbers using the Sequence Generator. For more information, contact your system administrator or see Chapter 20: Autonumbers, in the *Accela Civic Platform Administration Guide*.

6. Select the provider type:

- **Education Provider** – the provider offers a degree required to receive a professional license.
- **Continuing Education Provider** – the provider offers maintenance or recertification programs for an existing professional license.
- **Examination Provider** – the provider administers professional certification or licensing examinations. Depending on your agency's agreement with external providers, the provider may maintain their exam data within Civic Platform or on an external system accessible from Civic Platform via a URL link.



**Note:**

If your agency accesses exam data on an external system, select the **Use External URL** option and supply the URL. Click **Test Connection** to test your URL. Consult with your system administrator for more information. (Civic Platform currently supports integration with the Exam Builder exam site)

7. Click **Submit**.

Civic Platform adds the provider to the list of professionals.

If you selected examination provider as the provider type, Civic Platform adds two secondary tabs to the record: Examination and Examination Sites.

- To work with exam subjects offered by a provider, see [Associating Examination Subjects with a Provider](#)
- To schedule exams, see [Scheduling an Examination](#).
- To assign proctors, see [Assigning a Proctor to Administer an Examination](#).
- To work with exam registrants, see [Working with Registered Records](#).

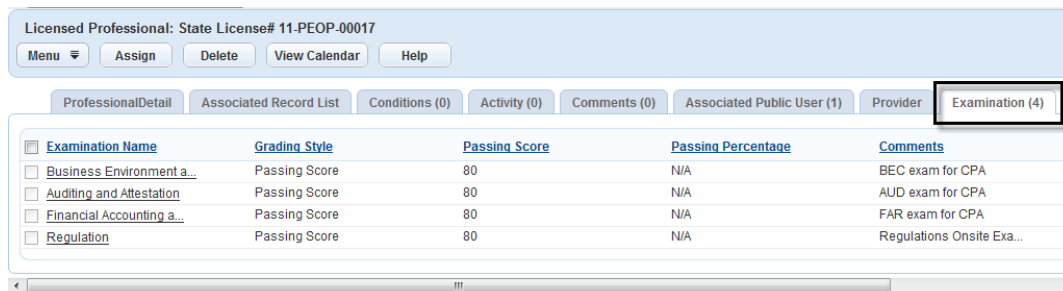


## Associating Examination Subjects with a Provider

You can assign an examination subject to an examination provider in the provider (licensed professional) record. Some agencies choose set up and associate examination providers and examinations so that they are available for users to select. See “Associating an Examination Subject with Examination Providers” in the *Accela Civic Platform Administrator Guide* for more information

### To add an examination to a examination provider

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. Use the search functionality to locate the provider you want to work with. See [Using the Search Features](#) for information about searching.
3. From the search results, click the provider you want to work with.  
The provider record displays in the Licensed Professional detail portlet.
4. Select the Examination tab.  
If you do not see this tab, the selected provider is not configured to be an examination provider. See [Select the provider type](#): of the Adding a Provider section for more information.  
Civic Platform displays the Examination tab.



5. Click **Assign**.  
Civic Platform displays the Examination form.

The screenshot shows the 'Examination' form for 'Licensed Professional: State License# 11-PEOP-00017'. The form includes the following fields and options:

- Examination Name \***: A dropdown menu with "--Select--" and a link to "Standard Comment".
- Comments**: A text area.
- Grading Style \***: A dropdown menu with "Pass/Fail".
- Accept Scheduling Requests in ACA**: A checkbox.
- Advance Time (Hours) Required to Schedule / Reschedule / Cancel the Examination**: A text input field.
- Status**: A dropdown menu with "Enabled".
- Associated Fee Items**: A field with a trash icon.

6. Complete the fields that display.  
If the examination you want to add is not listed in the drop-down list, contact your administrator. See [Examination Fields](#) for field definitions.
7. Click **Submit**.  
Civic Platform returns to the Examination tab where your new examination entry displays.
8. To schedule the exam, see [Scheduling an Examination](#).
9. To work with exam registrants, see [Working with Registered Records](#).

## Scheduling an Examination

You can schedule an examination, assign one or more exam locations, and assign proctors as needed.

### To schedule an exam in the examination provider record

1. Use the search functionality to locate the provider you want to work with. See [Using the Search Features](#) for information about searching.
2. From the search results, click the provider you want to work with.  
The provider record displays in the Licensed Professional detail portlet.
3. Select the Examination tab.  
If you do not see this tab, the selected provider is not configured to be an examination provider. See [Select the provider type](#): of the Adding a Provider section for more information.  
Civic Platform displays a list of assigned examination subjects.
4. Click an examination name link to open the examination detail form.
5. Click the Schedule tab.  
Civic Platform displays the scheduling form.

The screenshot shows the 'Schedule' tab of the examination provider record. The form includes the following elements:

- Navigation:** 'Examination', 'Schedule', and 'Registered Records' tabs.
- Start Date:** 'Schedule Start Date' field with a date picker icon.
- Time Period:** 'Add Time Period' link, 'Start Time' (09:00 AM), and 'End Time' (11:00 AM) fields with a 'Delete' button.
- Recurrence:**
  - None
  - Repeat every  day(s)
  - Repeat every  week(s) on
    - Sunday  Monday  Tuesday  Wednesday
    - Thursday  Friday  Saturday
  - Repeat every  month(s) on 
    - Sunday  Monday  Tuesday  Wednesday
    - Thursday  Friday  Saturday
  - Repeat every  year(s)
- Other Fields:** 'End Re-occurrence' and 'Block Out Days' text input fields.
- Table:** 'Examination Sites' section with an 'Add' link and a table with columns: 'Location', 'Max. Seats', 'Supported Languages', 'Accessibility', 'Proctors', and 'Actio'.

### 6. Select the date and time of the exam:

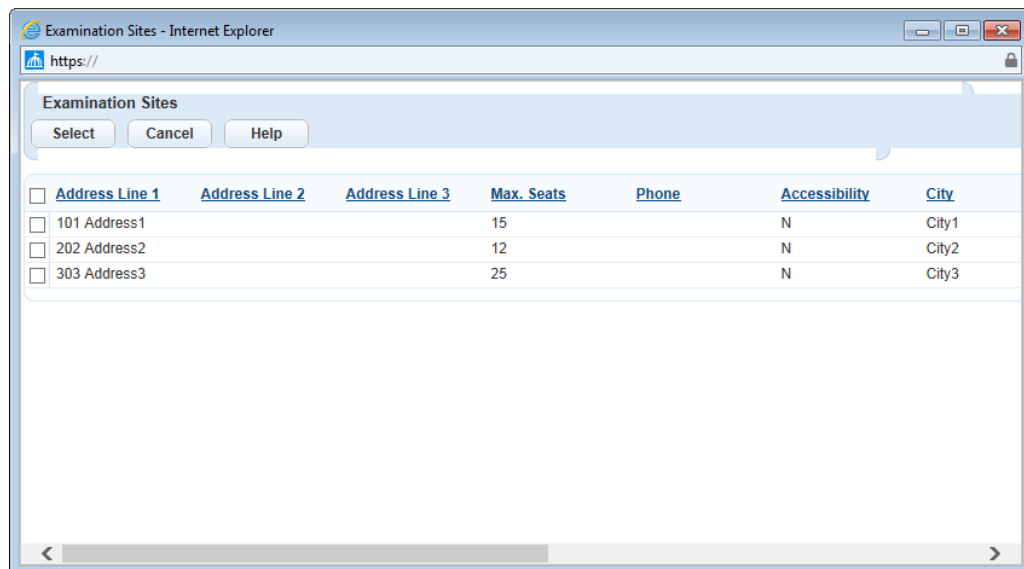
- If you are scheduling only one examination time:
  1. Enter the date of the exam in the **Schedule Start Date** field. You can use the date picker tool to the right of the field.
  2. Specify the **Start Time** and **End Time** of the exam
  3. For Recurrence, select **None**.
- If you are scheduling multiple examination times on the same day:

1. Enter the date of the exams in the **Schedule Start Date** field. You can use the date picker tool to the right of the field.
  2. Click the **Add Time Period** command above the Start Time and End Time fields to add a new time period row. Repeat until you have enough rows for each time you want to schedule.
  3. Specify the **Start Time** and **End Time** of each exam.
  4. For Recurrence, select **None**.
- If you are scheduling multiple examination times on different days:
    1. Enter the date of the first exam in the **Schedule Start Date** field. You can use the date picker tool to the right of the field.
    2. Use the **Add Time Period** command above the Start Time and End Time fields to add a new time period row if you have more than one time period per day.
    3. Specify the **Start Time** and **End Time** of the each exam.
    4. For Recurrence, select from the available recurrence options. You can schedule exams to recur daily, weekly, monthly, or annually. You can set an end date for the schedule, and you can configure block out days (for example, holidays or weekends). See [Examination Schedule Fields](#) for more information about recurrence options.
7. Select the examination site(s) where the examination will be administered.

**Note:**

Examination sites must be added in the Examination Sites tab of the Provider record before you can select them here. See [Adding Examination Sites](#).

- a. Click **Add** to the right of the Examination Sites label.  
The Examination Sites dialog displays.



- b. Select the site(s) you want to add to your scheduling form.
- c. Click **Select**.

Civic Platform returns to the Schedule tab with the selected examination site(s) displayed in the Location section of the form.

Recurrence:

None

Repeat every  day(s)

Repeat every  week(s) on

Sunday  Monday  Tuesday  Wednesday

Thursday  Friday  Saturday

Repeat every  month(s) on  ▼

Sunday  Monday  Tuesday  Wednesday

Thursday  Friday  Saturday

Repeat every  year(s)

End Re-occurrence

Block Out Days

Examination Sites [Add](#)

Location	Max. Seats	Supported Languages	Accessibility	Proctors	Action
<a href="#">101 Address1, City1</a>	15	<input type="text" value="English"/>	No	<a href="#">Assign Proctors</a>	<a href="#">Delete</a>
<a href="#">202 Address2, City2</a>	12	<input type="text" value="English"/>	No	<a href="#">Assign Proctors</a>	<a href="#">Delete</a>

8. Assign proctors for each exam site you added. See [Assigning a Proctor to Administer an Examination](#) for detailed steps.

9. Click **Save**.

After you submit a schedule, exam sessions display in the license applications as options for exam selection. For detailed information about how to select an exam session in a license application, see [Working in the Examination Section](#).

## Assigning a Proctor to Administer an Examination

---

When you assign proctors for exams, Civic Platform sends a notification to the selected individual(s), inviting him/her to proctor exams which are listed in the email. The email provides the contact with the opportunity to accept or decline the assignment by clicking the appropriate link.

**Note:**

To support the proctor notification functionality, the following scripts are available: ProctorAssignedAfter and ProctorUnassignedAfter.

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### Topics

- [Tracking Proctor Invitations and Responses](#)
- [Removing a Proctor from an Examination Event](#)
- [Reassigning an Examination to a New Proctor](#)

### To assign a proctor to an examination from the Schedule tab

---

**Note:**

The following process assumes that you have already scheduled the examination and defined examination sites for the examination. If you have not done these tasks, see [Scheduling an Examination](#) before you assign a proctor.

---

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. Use the search functionality to locate the provider you want to work with. See [Using the Search Features](#) for information about searching.
3. From the search results, click the provider you want to work with.  
The provider record displays in the Licensed Professional detail portlet.
4. Select the Examination tab.
5. Click the exam you want to work with.
6. Select the Schedule tab and scroll down to the Examination Sites list.
7. Click **Assign Proctors** for the exam site where you need a proctor.  
The Assign Proctors dialog displays.

Select your target examination sessions:

From: 12/16/2013 To: 06/16/2014 Filter

<input type="checkbox"/>	Date	Weekday	Start Time	End Time
<input type="checkbox"/>	12/21/2013	Saturday	09:00:00 AM	11:00:00 AM
<input type="checkbox"/>	12/26/2013	Thursday	09:00:00 AM	11:00:00 AM
<input type="checkbox"/>	12/31/2013	Tuesday	09:00:00 AM	11:00:00 AM

Undo previous proctor assignment in selected sessions.

Continue Cancel

8. If you scheduled multiple examination sessions, you can use the **From-To** fields to filter the exams you want to assign.

For example, to filter the list of exams for a single day, select the same date for both the **From** and the **To** fields, then click **Filter**.

9. Select the exam sessions that you want the proctor to administer.

10. Click **Continue**.

11. Enter search criteria to locate the person you want to proctor the exam(s). The individual must be an existing reference contact. See [Adding a Reference Contact](#) for information about adding a new contact if needed.

12. Click **Submit**.

The search results display.

13. Select the individual(s) that you want to invite to proctor the selected exam(s).

14. Click **Select**.

Civic Platform sends an email invitation to the selected contact, inviting the individual to proctor the selected exams. The email includes information about the exam(s) and provides the contact with the opportunity to accept or decline the assignment by clicking the appropriate link.

## Tracking Proctor Invitations and Responses

When you assign a proctor for an examination site, Civic Platform sends an email invitation to the selected contact. The email includes information about the exam(s) and provides the prospective proctor with an opportunity to accept or decline the proctor assignment by clicking the appropriate link.

You can use the Registered Records tab to track whom you have sent proctor assignment invitations to, and what responses Civic Platform has received in reply.

When you select the time and site of any exam, Civic Platform lists the proctor assignments. This listing includes the proctor name and the status of the assignment. Status options include Assigned, Accepted, and Rejected, along with the date that the status was last updated.

Examination
Schedule
Registered Records

< Previous
12/21/2013
Next >

Time

Site

Proctors JOHN SMITH    chennella@gmail.com    Assigned on 12/16/2013    [View](#) [Delete](#)

Test Test    test.test20@accela.com    Assigned on 12/16/2013    [View](#) [Delete](#)

0 registered record(s).

<input type="checkbox"/>	Roster ID	Alternate ID	Location	Start Time	End Time	Passing Score	Score	
0 record(s) found.								

Based on the information you see, you may decide to remove a proctor from this list and reassign an examination to a new proctor. See [Reassigning an Examination to a New Proctor](#) for more information.

## Removing a Proctor from an Examination Event

You can remove proctors from an exam event using functionality on the Registered Records tab. When you remove a proctor, Civic Platform sends an email to that proctor to notify him/her of the change in assignment.

To remove a proctor, follow the procedure described in [Reassigning an Examination to a New Proctor](#).

## Reassigning an Examination to a New Proctor

When you assign a proctor to an examination, Civic Platform sends the prospective proctor an email invitation which he/she may accept, decline, or ignore. Once you have made the initial assignment, you can track the responses to your invitations from the Registered Records tab for an exam. If you see that a proctor has either rejected an assignment or has not responded to the invitation, you can remove that individual as a proctor for the exam and assign a new proctor, all from the Registered Records tab.

### To assign a new proctor to an exam



#### Note:

The following process assumes that you have already scheduled the examination, defined examination sites, and assigned proctors for the examination. If you have not done these tasks, see [Scheduling an Examination](#) before you assign a proctor.

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. Use the search functionality to locate the provider you want to work with. See [Using the Search Features](#) for information about searching.
3. From the search results, click the provider you want to work with.  
The provider record displays in the Licensed Professional detail portlet.
4. Select the Examination tab.
5. Click the exam you want to work with.
6. Select the Registered Records tab.
7. From the **Time** and **Site** dropdown lists, select the examination event for which you want to reassign a proctor.  
Proctor information for the selected event displays below the Time/Site.

Examination Schedule Registered Records

< Previous 12/21/2013 Next >

Time 09:00 AM~11:00 AM Repeat every 5 day(s) till 01/01/2014 09:00 AM Site 101 Address1, City1, New Brunswick, Davis Station

Proctors JOHN SMITH chennella@gmail.com Assigned on 12/16/2013 View Delete  
 Test Test test.test20@accela.com Assigned on 12/16/2013 View Delete

0 registered record(s).

<input type="checkbox"/>	Roster ID	Alternate ID	Location	Start Time	End Time	Passing Score	Score	La
0 record(s) found.								

8. To view details about a proctor, click the **View** link for the proctor.
9. To remove a proctor from the list, click the **Delete** link for the proctor you want to remove. Civic Platform prompts you to confirm the deletion.
10. Click **OK**.  
Civic Platform removes the proctor and sends an email to the proctor, informing him/her of the action.
11. Click **Assign Proctors** in the toolbar.  
A Contact Search form displays.
12. Enter search criteria and click **Submit**.  
Contacts matching your search criteria display.
13. Select the individual that you want to assign to proctor this exam.
14. Click **Select**.  
Civic Platform adds the individual to the Proctor list on the Registered Records tab with a status of Assigned. Civic Platform also sends an email invitation to the newly assigned proctor, prompting him/her to accept or decline the assignment.



## Selecting Examination or Education Records for an Application

---

After you define a primary contact for the application, you can search for education, continuing education, and examination data registered with the referenced contact, and then select the examination and education information you want to use with the application. Civic Platform assists you in this by auto-selecting any listed education/examination record that meets the application requirements.

### To add a contact reference's examination or education records to a new or existing application

1. If you are creating a new application, follow your agency's process for creating a new application and selecting a primary contact.
2. Proceed to the Exam, Education, or Continuing Education section of the application and click **Lookup** (if your application intake form has includes multiple contact sections, the Lookup button is not available).

Civic Platform displays a list of examination, education, or continuing education records associated with the primary contact for the application. If Civic Platform identifies a record that meets that current application requirements, it auto-selects that record for you.

3. Select the examination, education, or continuing education record(s) that you want to use for the current application.
4. Click **Submit**.

The selected record(s) become part of the application, and Civic Platform prevents the records from deletion in the Contact Reference portlet.

## Approving Examination or Education Records

---

Authorized agency users can manually approve and disapprove education and examination records. The reference contact can view and use the data for multiple applications.

### To approve/disapprove an exam or education record

1. Navigate to the Records portlet.
2. Use search to locate and select the application you want to work with.  
The Record detail portlet displays.
3. Click the tab (Examinations, Education, or Continuing Education) containing the records you want to approve/disapprove.
4. Select the object(s) you want to approve/disapprove.
5. Click **Approve** to approve the object.  
Click **Disapprove** to disapprove the object.  
If approved, the object record auto-synchronizes to the reference contact.

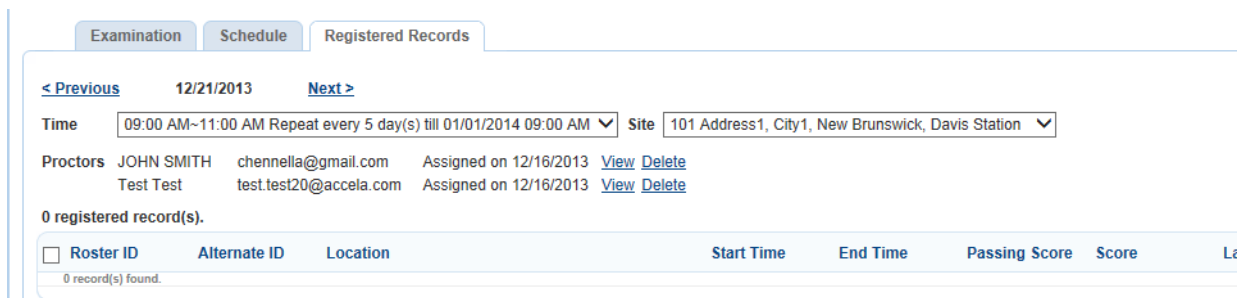
## Working with Registered Records

### Topics

- [Viewing Registrants](#)
- [Rescheduling an Exam for Selected Registrants](#)
- [Canceling an Exam Session for Selected Registrants](#)
- [Assigning an Exam Session to Multiple Registrants](#)

### Viewing Registrants

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. From the Licensed Professional list, click the record number of the desired examination provider record.  
Civic Platform displays the Provider record in the Licensed Professional detail portlet.
3. Select the Examination tab.  
Civic Platform displays a list of assigned examinations.
4. Click an examination name to view the examination details.
5. Click the Registered Records tab.  
Civic Platform displays the Registered Records sub-section.



6. Use the Previous and Next buttons to view data for other exam dates. You can also use the Time and/or the Site field to filter the registered records by exam time and exam site.

### Rescheduling an Exam for Selected Registrants

1. Select the desired registrants that need to be rescheduled.
2. Click **Reschedule**.  
Civic Platform displays a window with a list of reasons for rescheduling.
3. Select a reason for rescheduling and click **Next**
4. Select a new exam session.

### Canceling an Exam Session for Selected Registrants

1. Select the rosters from which you want to disassociate the exam session.

2. Click **Cancel**.

Civic Platform displays a window with a list of reasons for canceling exam session.

3. Select a reason and click **Next**.

Civic Platform disassociates the exam session from the license application and removes the license application from the Registered Records sub-section.

## **Assigning an Exam Session to Multiple Registrants**

1. Select an exam time and location from the **Time** and the **Site** drop-down lists.

2. Click **Register More**.

Civic Platform displays the Record Search portlet.

3. Enter search criteria as appropriate and click **Submit**.

Civic Platform lists the records matching your search criteria.

4. Select the records to which you want to assign the exam session.

5. Click **Submit**.

## Viewing an Examination Calendar

Use the examination calendar to review exam information for a provider in daily, weekly, and monthly view modes. In the selected mode, you can click an exam item to see the exam sessions and the number of registrants for each exam session. See [Scheduling an Examination](#) to learn how to schedule examinations for an examination subject.

You can access the examination calendar from the Examination tab for a selected examination provider. This view enables you to view a comprehensive calendar of all the exams offered by the examination provider.

You can also access the examination calendar from the Registered Records tab for an examination. This view enables you to view a calendar that shows scheduled times for the selected examination only.

**Figure 19: Examination Calendar**

### To view an examination calendar

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. From the Licensed Professional list, click the record number of the desired examination provider record.  
Civic Platform displays the Provider record in the Licensed Professional detail portlet.
3. Select the Examination tab.
4. Click **View Calendar** in the toolbar.

Civic Platform displays the Examination Calendar window.

5. Click **Day**, **Week**, or **Month** to view the exam session information in daily, weekly, or monthly mode.
6. Click one of the exam items.  
Civic Platform displays the exam sessions along with the number of the registered rosters for each session at the bottom of the window, as shown in the [Examination Calendar](#).
7. Click an exam session to access the Registered Record portlet.
8. Click the left or right arrow to move one month back or forward.
9. Click **This Month** to locate current month.
10. You can also search for exam items by specifying examination subject or examination site.

## Adding Examination Sites

Once you create exam locations, you can associate them with exam sessions. To learn how to schedule an exam, see [Scheduling an Examination](#).

### To create an examination site

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.
2. Click the record number of the desired examination provider record. See [Adding a Provider](#) to learn how to create an examination provider record.  
Civic Platform displays the Provider record in the Licensed Professional detail portlet.
3. Select the Examination Sites tab.  
Civic Platform displays a list of examination locations.
4. Click **New**.  
Civic Platform displays the Examination Sites form.

5. Complete the fields that display. For a list of field descriptions, see [Examination Site Fields](#).
6. Click **Submit**.

## Updating Scores

Depending on agreements your agency may have with the providers of certification-level examinations, providers can upload scores directly via Citizen Access, or agency users can enter scores using Civic Platform. You can also update scores by synchronizing from an external system via a URL link.

### To update scores by uploading a score file to the examination provider record

1. Navigate to the Licensed Professional portlet.  
Civic Platform displays the Licensed Professional list.

- Click the record number for the desired examination provider record. See [Adding a Provider](#) to learn how to create an examination provider record.

Civic Platform displays the provider record in the Licensed Professional detail portlet.

- Select the Documents tab.

Civic Platform displays a list of attachments.

<input type="checkbox"/>	File Name	Category	Description	Size	Type	Modified Date	Modified By	Source
<input type="checkbox"/>	Copy of Examina...			329.0 bytes	applicati...	01/11/2012	Martha C. Liu	ACCELA

- Click **New**.

Civic Platform displays the file upload page.

Source \*  
ACCELA

Document Group/Category  
--Select--

Department [Current Department](#)  
Building Dep. ▾

Description

[Apply Definitions to Selected](#)

<input type="checkbox"/>	File Name * Up to 10MB	Document Group/Category	Department	Description
--------------------------	------------------------	-------------------------	------------	-------------

- Follow the procedure for attaching a document as described in [Attaching Files](#).

Civic Platform uploads the score file to the database.

- Click **Update Scores**.

Civic Platform updates the scores to the mapping license applications.



**Note:**

If Civic Platform has no mapping license application registered for the exam, Civic Platform creates an exam entry for it based on data from the CSV file.



## Examining Contact, Professional, and Provider Details

The following tables list and define the default fields available in the different interfaces you will encounter when working with contacts and licensed professionals.

- [Examination Fields](#)
- [Examination Schedule Fields](#)
- [Examination Site Fields](#)

### Examination Fields

The table below lists and defines fields that may be available as you work with Examinations.

Table 32: Examination Fields

<b>Examination Names</b>	Select an examination subject from the drop-down list.
<b>Grading Style</b>	This field populates when you select an examination subject. However, you can change the default value to one of the following: Pass/Fail, Passing Score, Passing Percentage, or None. If you select Passing Score or Passing Percentage, an additional field displays where you may enter the score/percentage required to pass the examination.
<b>Comments</b>	This field populates when you select an examination subject. You can modify the content as needed.
<b>Status</b>	This field populates when you select an examination subject.
<b>Associated Fee Items</b>	Associate fee items for the examination schedule.
<b>Accept Scheduling Requests in ACA</b>	Indicates whether to an examination subject is available option for public users to select in Accela Citizen Access.
<b>Advance Time (Hours) Required to Schedule/Reschedule/Cancel the Examination</b>	A number of hours to indicate that, in the number of hours before the exam session takes place, users (license applications) may not select, reschedule, or cancel this exam session.

### Examination Schedule Fields

The table below lists and defines fields that may be available as you work with examination scheduling.

Table 33: Examination Schedule Fields

<b>Add Time Period</b>	The exam duration (Start Time and End Time). You can add more Time period by clicking the <b>Add Time Period</b> .
<b>Block Out Days</b>	The specific dates that the provider cannot provide exams.
<b>End Re-occurrence</b>	When the recurring schedule is scheduled to end. If left blank, a schedule repeats indefinitely.
<b>Examination Site</b>	The exam location.
<b>None</b>	Indicates a one-time exam without recurrences.
<b>Repeat every day(s)</b>	Used to generate an exam session every x number of days.
<b>Repeat every week(s)</b>	Used to generate an exam session every X number of weeks, as well as the day of the week when the exam session is to take place.

<b>Repeat every month(s)</b>	Used to generate an exam session every X number of months, as well as the day of the month when the exam session is to take place.
<b>Repeat every year(s)</b>	Used to generate an exam session every X number of years,.
<b>Schedule Start Date</b>	The date for the first exam session in a set of scheduled sessions.

## Examination Site Fields

The table below lists and defines fields that may be available as you work with examination sites.

Table 34: Examination Site Fields

<b>Accessibility</b>	Indicates whether the exam location provides disabled accessibility.
<b>Address Line 1</b>	The first line of the exam location.
<b>Address Line 2</b>	The second line of the exam location.
<b>Address Line 3</b>	The third line of the exam location.
<b>Country/Region</b>	The country or region name for the exam location.
<b>City</b>	The city name for the exam location.
<b>Driving Directions</b>	Information on how to drive to the exam location.
<b>Max. Seats</b>	The number of seats that the exam room accommodates.
<b>Phone</b>	The exam center's contact phone number.
<b>State</b>	The state where the exam is located.
<b>Status</b>	Indicates whether an exam site can be applied to exam schedules or not.
<b>Zip</b>	The zip code for the exam location.

## Electronic Document Review

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Choose a topic from the list below to learn more about working with electronic document review.

### **Related Information**

[Electronic Document Review Overview](#)

[Installation and Configuration](#)

[Electronic Document Review Workflow](#)

[Document Review Walkthrough \(Acrobat\)](#)

[Using Electronic Document Review](#)

## Electronic Document Review Overview

---

Civic Platform integrates with Adobe Acrobat Pro to give agencies the ability to digitally manage PDF documents and plans efficiently and effectively for the entire life cycle of a project. With the Electronic Document Review (EDR) feature, you can attach single or multiple PDF documents to a record. You can then assign the documents for review to one or more reviewers. Reviewers can access and manage their assigned documents either via the record or via their individual My Tasks portlet. Users can use the Global Search portlet to search for specific documents as needed using document-oriented search criteria.

You can open attached PDF documents in Adobe Acrobat Pro directly from Civic Platform. Once open, you can use Acrobat Pro's annotating tools to review, comment, and mark up plans. Accela provides a set of standard review stamps as a quick start feature you can use for your review. When you complete a review, you can use the Civic Platform add-on toolbar buttons to save your commentary and annotations to the Civic Platform application server. The Accela add-on toolbar also provides configurable online access to ICC eCodes as well as state codes and local codes as required. Reviewers can look up codes and regulations, and use standard copy/paste functionality to cite regulations via annotations that they added the PDF.

To better manage the life cycle of documents, a Document Audit log is available (see [Audit Logs](#) for more information). The Document Audit log records all changes made to attached documents, including the moment when Civic Platform attaches a document to a record, as well as annotations and comments that users added, modified, and saved.

**Note:**

If your agency uses an EDMS system to store documents, an EMSE API function, `aa.Document.downloadFile2Disk`, is available that your agency can use in scripting to download documents from the EDMS server to a Civic Platform server location, where they can be accessed and sent out as part of an automated email attachment.

---

# Installation and Configuration

## Topics

- [Installation](#)
- [Configuring Doc Status Auto-update](#)
- [Configuring Resubmission Auto-assignment](#)

## Installation

Before you can put EDR to use in your agency, you must install the following applications on each workstation where a user plans to use EDR.

- Adobe Acrobat Pro
- .NET Framework 4 Client Profile
- Electronic Document Review

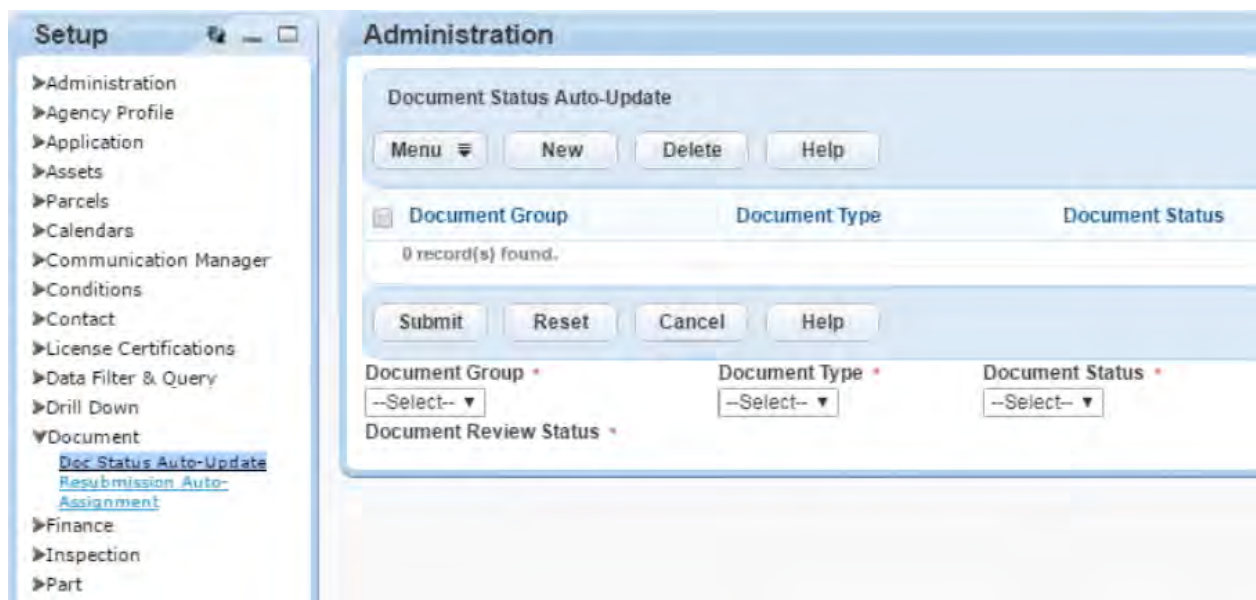
For complete installation instructions, and for tips to create custom stamps, buttons, and other objects, see the *Civic Platform Installation Guide*, available via the [Documentation Library on Community](#) and on the FTP site.

## Configuring Doc Status Auto-update

When multiple reviewers are reviewing the same document and a consensus is reached by all reviewers on the review status, the overall document status can be updated automatically. For example, during a plan review, if all of the reviewers update their individual document review statuses to Corrections Required, Civic Platform updates the overall document status to a corresponding status that you specify, for example, Denied. If all of the reviewers update their review status to Approved you can configure the overall document status to update to Approved, and so forth.

### To configure this feature:

1. Navigate to **Civic Platform Administration > Setup > Document > Doc Status Auto Update.**



2. Click **New**.
3. Select the Document Group, Document Type, and Document Review Status that will automatically update the overall Document Status to a status that you specify when a consensus is reached by all reviewers..

In the following example, the Plan Review group has six plan reviewers who are reviewing a Document Type "Plans." When all six plan reviewers select the Document Review Status "Corrections Required," Civic Platform updates the overall Document Status to "Denied."

The screenshot shows the 'Administration' interface for 'Document Status Auto-Update'. It features a table with columns for Document Group, Document Type, Document Status, and Document Review Status. Below the table is a form with dropdown menus for Document Group, Document Type, and Document Status, and a list of checkboxes for Document Review Status. The 'Corrections Required' status is selected.

<input type="checkbox"/>	<u>Document Group</u>	<u>Document Type</u>	<u>Document Status</u>	<u>Document Review Status</u>
<input type="checkbox"/>	PLAN REVIEW	Plans	Denied	Corrections Required
<input type="checkbox"/>	PLAN REVIEW	Plans	Contingent Approval	Approved w Conditions
<input type="checkbox"/>	PLAN REVIEW	Plans	Approved	Approved

Page 1 of 1

Submit Reset Help

Document Group \*  
PLAN REVIEW

Document Type \*  
Plans

Document Status \*  
Denied

Document Review Status \*

- Approved
- Approved w Conditions
- Corrections Required
- In Progress
- No Review Required
- Revision Accepted

4. Click **Submit**.

## Configuring Resubmission Auto-assignment

In this scenario, when all members of a building department are assigned a workflow task to review plans, and all of the reviewers complete their reviews, but one reviewer updates the Document Review Status to Corrections Required, you can configure the document to be assigned to that reviewer automatically when it is re-submitted.

**To configure this feature:**

1. Navigate to **Civic Platform Administration > Setup > Document > Resubmission Auto Assignment**.
2. Click **New**.
3. Select the Document Group, Document Type, and Document Review Status that will automatically assign the document to the appropriate reviewer.

**Setup**

- »Administration
- »Agency Profile
- »Application
- »Assets
- »Calendars
- »Communication Manager
- »Conditions
- »Contact
- »Data Filter & Query
- »Drill Down
- »Document
  - Doc Status Auto-Update
  - Resubmission Auto-Assignment**
- »Finance
- »Inspection
- »Report
- »Structures & Establishments
- »System Tools
- »Workflow & Activity
- »Costing
- »Time Accounting

**Administration**

**Resubmission Auto-Assignment**

Menu ▾ New Delete Help

Showing 1 of 1

<input type="checkbox"/>	<u>Document Group</u>	<u>Document Type</u>	<u>Document Review Status</u>
<input checked="" type="checkbox"/>	PLAN REVIEW	Plans	Corrections Required

Page 1 of 1

Menu ▾ Submit Reset Help

**Document Group \***  
PLAN REVIEW ▾

**Document Type \***  
Plans ▾

**Document Review Status \***

- Approved
- Approved w Conditions
- Corrections Required
- In Progress
- No Review Required
- Revision Accepted

4. Click **Submit**.

## Electronic Document Review Workflow

---

This simplified example demonstrates one way that an agency can incorporate the EDR feature into a permit processing workflow.

### Roles

- **Public User** (homeowners, contractors, or architects)  
Members of the public can submit supporting documentation needed for their projects using Citizen Access. Documents saved in PDF format can be submitted singly or in batches. After submittal, the individual can identify his documents and enter relevant comments for each document. Agencies can configure Civic Platform to send the submitter an email when action occurs on his documents or when the submitter must take further action. The submitter can also log in to Citizen Access at any time to check the status of his project, including his documents.
- **Document Intake Personnel** (Permit Technician, Document Intake Clerk)  
In many agencies, it is the job of one or more individuals to receive documents, record their receipt, assign control numbers, and then date the documents so that users can track them throughout the life cycle of a project/permit process. This person then routes the appropriate documents to the appropriate staff for review. In some agencies, an intake clerk might break up PDF documents into several smaller files so that relevant pages can go to the proper destinations. Users can accomplish all of these tasks with Electronic Document Review.
- **Plan Reviewer** (Building Inspectors, Fire Code Inspectors, Engineers)  
Depending the nature and scope of the agency, this individual's role in the Electronic Document Review process is to interact directly with documents via a review process. This person can make comments, insert annotations, perform measurements, and save his commentary to Civic Platform as part of the electronic project file.
- **Processor** (Plans processor)  
This individual's role in the Electronic Document Review process may vary by agency, but typically, this person reviews the annotations from the plan reviewers, and then ensures that the proper stamps exist. This person then uses the Check-in Revision button in the Accela Add-on toolbar to merge the original PDF and the annotations into a new document. Civic Platform stores this new document in the record along with the original PDF.



## Document Review Walkthrough (Acrobat)

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The following is a simplified use case scenario of the path a document might travel when submitted to an agency by a citizen as part of a planning or approval process.

### Step 1: Submission

- A citizen wants to build an extension to his house. He works with a general contractor who needs to submit a permit application and supporting documentation and plans to the City Building Permits Department for approval before starting work.
- The contractor has an Citizen Access account already established on the City's system, so she logs in to the Citizen Access portal on the Building Permits Department website.  
There, she completes the permit application, pays her fees, and submits supporting documentation in PDF format.

### Step 2: Intake and Distribution

- At the Building Permits Department, the agency administrator has created a workflow to manage the permit application process. The first task is application acceptance. Civic Platform assigns this task to a Permit Clerk, who sees his new task in his My Tasks portlet. It is his job to ensure that the application is complete, and that all the required documentation is available. He opens the record for this new permit application and then checks the application information.

#### References

- Chapter 15: Workflow (*Accela Civic Platform Administrator Guide*)
- [Workflows and Workflow Tasks](#) .
- He then opens the Documents tab on the record, where he uses Electronic Document Review functionality to open each submitted document in Adobe Acrobat Pro. There, he uses Acrobat Pro's stamping function to mark the document pages with a custom Receipt stamp that shows the current date, and he publishes the documents back to the Civic Platform application server. After he finishes, he sets the workflow task status to 'completed,' which allows the workflow to move along to the next step, Plan Review. If your agency has configured the workflow to auto-assign plan reviews to personnel, that may occur now. Otherwise, he can manually assign documents for review from the Documents tab.

#### References

- [Reviewing a Document in Adobe Acrobat Pro](#).
- [Opening a PDF document for review from Civic Platform](#).
- [Using Stamps](#).
- [Workflows and Workflow Tasks](#) .
- The Permit Clerk verifies the plan review task assignments to the Building and Fire departments.


### Step 3: Review

- The Building Structural Plan Reviewer is tasked with reviewing the plans to ensure that they comply with building codes and building regulations. She logs in to Civic Platform and finds the assigned document review tasks that are awaiting her attention in the Document Review Tasks tab of her My Tasks portlet. She selects Review from the Action menu for the document to open the building plan. The document launches in Adobe Acrobat Pro, where she can insert comments and annotations, take

measurements and update review checklists. She uses the ICC codes button in the Accela toolbar to launch a building code reference website, from which she copies code text into a note.

She uses a custom “Approved with Changes” stamp to mark the document. The stamp includes the current date and the name of the reviewer. She then saves and publishes the comments and returns to the My Tasks portlet, where she opens the Document Information window and goes to the Doc Review Tasks tab, where she updates the review status to ‘Approved with Changes.’


### References

- [Completing a Doc Review Checklist](#) .
- [Reviewing a Document in Adobe Acrobat Pro.](#)
- [Opening a PDF document for review from Civic Platform.](#)
- [Annotating Documents.](#)
- [Saving Annotations and Comments](#)
- At the same time, the Fire Plan Reviewer is tasked with reviewing the plans to ensure that they comply with fire code regulations. He logs in to Civic Platform and finds the assigned task is waiting for him in his My Tasks portlet. He launches the document in need of review by selecting Review from the Action menu for the document.

As with the first reviewer, Civic Platform launches the document in Adobe Acrobat Pro, where the reviewer makes comments and update review checklists as necessary.

He uses a custom Approved stamp to mark the document. The stamp includes the Fire Department seal, the current date, and the name of the reviewer. He wants to see if other reviewers have added any other annotations while he was working, so he clicks the **Get Updates** button. The saved comments by the other reviewer appear, and this reviewer is able to see that the Building Structural Reviewer flagged and commented on the same section of wall where he found some issues. He completes his review, publishes the document, and goes to the Doc Review Tasks tab, where he updates the review status to ‘Review completed’.

### References

- [Completing a Doc Review Checklist](#) .
- [Reviewing a Document in Adobe Acrobat Pro.](#)
- [Annotating Documents.](#)
- [Viewing Other Reviewer Comments within the PDF.](#)

### Step 4: Permit Desk Review

- After all the reviews are complete, the workflow queues the Plans Processor for a final review of the permit application record. He goes to the Workflow tab and opens the Sub Tasks tab that lists all of the review sub tasks. He opens the Document Information window, and launches the PDF file.
- After reviewing the comments and annotations made by the plan reviewers and ensuring that all the appropriate stamps are in place, he clicks the **Check-In** button. Civic Platform merges the original PDF file with all the reviewer comments and creates a new file.
- He names the new file PlanReview1.pdf, sets the permissions on it so it is accessible on Citizen Access. He then updates the workflow status to ‘Revision Required,’ which automatically sends an email to the general contractor. The email informs the contractor that she needs to make changes.

### References

- [Opening a PDF document for review from Civic Platform..](#)

- [Attachments](#)

#### **Step 5: Follow-through to Inspection to Closure**

- The general contractor logs in to Citizen Access to check the status of the building permit application and then download the annotated copy of the plans. She sees the comments and annotations about the changes required before the agency can approve the plans. She complies with the corrections and uploads a revised version of the plans.
- The Building Department Plans Processor receives an email that is auto-generated by Citizen Access that notifies him that the contractor submitted new plans. The Plans Processor opens the revised plans, date stamps them, and then routes them back to the Building and Fire Department plan reviewers. After each of the plan reviewers approves the revised plans, the Processor stamps the plans with the Agency Seal stamp, applies a digital signature, and then clicks the Check-In button. He names the new file FinalPlans.pdf and updates the Workflow status to Ready to Issue. The general contractor pays the remaining fees due and she receives a building permit so she can start construction.
- When the building inspector inspects the project, he is able to open the FinalPlans.pdf file from Mobile Office, which he can then reference to ensure that the project is consistent with the approved plans. Upon a successful inspection, the inspector records an approved Final Inspection.

## Using Electronic Document Review

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The Electronic Document Review feature fits seamlessly into a project workflow. This section describes how to perform several electronic document review processes.

### Topics

- [Attaching a Document](#)
- [Searching for a Document](#)
- [Attaching a Document to a Workflow Task](#)
- [Assigning a Document to One or More Reviewers](#)
- [Viewing Document Review Tasks by Document](#)
- [Editing a Document Review Task](#)
- [Working with Document Review Checklists](#)
- [Reviewing a Document in Adobe Acrobat Pro](#)
- [Interacting with Document Review Comments from Civic Platform](#)
- [Viewing the Document Review History for a Document](#)

See also: [Attachments](#) and [Workflows and Workflow Tasks](#) for related information.

### Attaching a Document

Users can use Citizen Access to submit supporting documents as part of a permit application process. When users submit document files, Civic Platform attaches the files to a record where a permit clerk or similar can interact with them. a Civic Platform user can also submit supporting documents from the Documents tab for a record. For example, a clerk may add document attachments that a customer submitted via email, or submitted in hard copy (which the clerk converts to electronic format by scanning). For documents to be eligible for Electronic Document Review processing, they must be in PDF file format when you attach them to the record. Most standard business and graphics applications have an option to save or print to PDF.



#### Note:

If you have a document to attach that is not in PDF format, but you want to incorporate it into your Electronic Document Review process, consider opening that document, then saving/printing it to PDF. You can then attach the PDF to the record.

---

### Topics

- [Attaching a Document to a Record via Citizen Access](#)
- [Attaching a Document to a Record via Civic Platform](#)

### Attaching a Document to a Record via Citizen Access

If Citizen Access is available, homeowners, contractors, and other citizens can submit necessary documentation in support of permit applications from the Citizen Access portal. You can process and review documents using the Electronic Document Review functionality. You can also make annotated documents available to the submitter via the same Citizen Access portal as needed.

**Note:**

If you allow the public to submit documents via 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 the Citizen Access Administrator Guide.

---

## Attaching a Document to a Record via Civic Platform

You can attach one or more PDF files at a time from the Documents tab of any record type. Many agencies set limits on file size and/or file type. The Batch Upload window lists these limits at the top when you add a new attachment. For details instructions on attaching a document, see [Attaching Files](#).

## Searching for a Document

The Global Search portlet supports searches for document attachments by using document-related search criteria such as document name, document description, and document category.

When Civic Platform returns search results, it lists any matches to the search criteria in a Documents list. You can do any of the following:

- Click the document name to view the Document Information window for any listed document.
- Click the Review link in the Review column to open a document in Adobe Acrobat Pro, where you can comment, annotate, and use stamps.
- Click the record number link to open the record that contains the desired document.

For more information about performing a global searches, see [Using the Search Features](#) .

## Attaching a Document to a Workflow Task

You can attach one or more documents to a workflow task as needed. After you assign a document to a workflow task, the document becomes a workflow sub task. You can access the document and assigned it to reviewers from the Sub Tasks tab on the Workflow page.

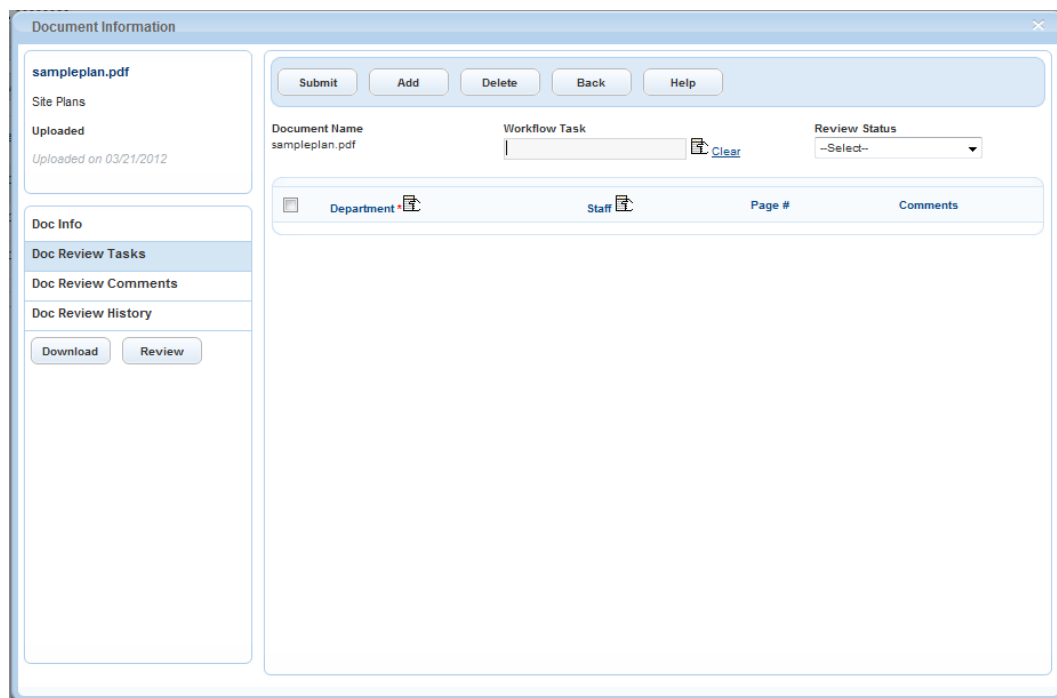
**Note:**


You may want to reorganize your workflow task organization to incorporate the Electronic Document Review processes into your agency workflows

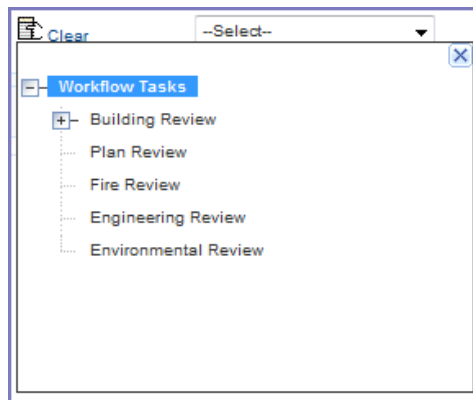
---

### To attach a document to a workflow task

1. Locate the document you want to assign. You can do this by going to the Documents tab for the selected record. You can also use Global Search to locate the document. See [Searching for a Document](#) for more information.
2. Select **Assign** from the **Actions** menu for the document you want to assign.  
The Document Information window launches, with the Doc Review Tasks tab displayed.



3. Click the **Workflow Task Selector**  button to the right of the Workflow Task field. The available workflow tasks for the current record display.



4. Select the Workflow Task to which you want to apply the current document. The selected task appears in the Workflow Task box.
5. Click **Submit** to save or continue on to assign reviewers. See [Assigning a Document to One or More Reviewers](#) below.


## Assigning a Document to One or More Reviewers

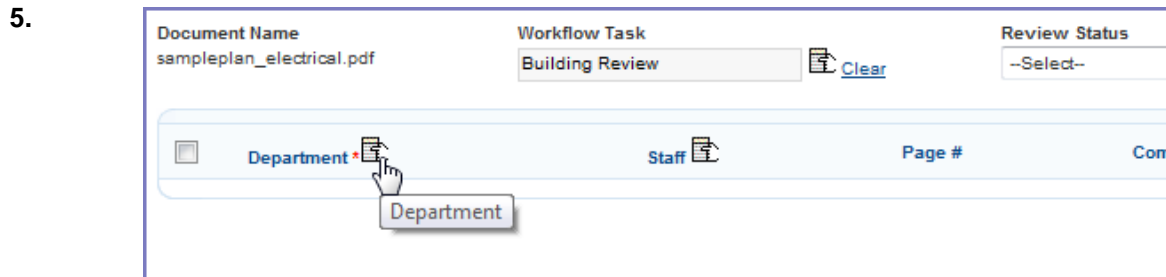
You can assign a document to one or more reviewers after you have attached the document to a workflow task. After you assign the document, the reviewer can use Electronic Document Review functionality to open the document in Adobe Acrobat Pro, review it, and save his comments back to Civic Platform.


### To assign a document to a reviewer

1. Locate the document you want to assign. See [Searching for a Document](#).
2. Select **Assign** from the **Actions** menu for the document you want to assign.

The Document Information window launches, with the Doc Review Tasks tab displayed.

3. If you have not done so yet, assign the document to a workflow task. See [Attaching a Document to a Workflow Task](#).
4. Click the **Department Selector** button  to the right of the Department label. A tree list of departments displays.



6. Check the box for the Department where the intended reviewer works, then close the department tree list.
7. Click the **Staff Selector** button  to the right of the Staff label. A tree list of staff in the selected department displays.
8. Select the individual to whom you want to assign this document review task.
9. Select the discipline of the document review task. The discipline is the area of focus in the task. Civic Platform tags all the comments from the reviewer with the discipline.
10. Use the **Page #** and **Comments** tab to give specific review instructions to the reviewer if needed.
11. If you want to assign this document to additional reviewers, click the **Add** button, then repeat steps 5 through 9.
12. Click **Submit** to save the Review assignment.  
Civic Platform updates the task on the Sub Tasks list for the Workflow task, and the task appears on the Document Review Tasks tab of the My Tasks portlet for the assigned reviewer.

## Viewing Document Review Tasks by Document

If you assign a document to more than one reviewer, you can view a list of review tasks for that document as needed.

### To view a list of document review tasks by document

1. Locate the document that you want to work with. You can search the Documents tab for the selected record, the Sub Tasks tab on the Workflow page, or the Document Review Tasks tab on the My Tasks portlet.  
You can also use Global Search to locate a document. See [Searching for a Document](#) for more information.
2. Select **View Document Info** from the **Actions** menu for the document you want to edit.
3. The Document Information window launches. Select the Doc Review Tasks tab.  
Civic Platform displays a list of document review tasks.

## Editing a Document Review Task

You may need to modify the details for a document review task for a number of reasons; for example, you may need to reassign the task, or you may need to add additional instructions in the Comments box.

### To edit a document review task

1. Locate the document you want to edit. You can search the Documents tab for the selected record or the Sub Tasks tab on the Workflow page.

You can also use Global Search to locate a document. See [Searching for a Document](#) for more information.

2. Select **View Document Info** from the **Actions** menu for the document you want to edit.

3. The Document Information window launches. Select the Doc Review Tasks tab.

4. Highlight the task that you want to edit.

Civic Platform displays the document review task details.

The screenshot shows a 'Document Information' window with the following content:

- Document Title:** 01\_Floor\_plan\_New\_Vector\_with\_comments.pdf
- Category:** Construction Plans
- Uploaded:** Uploaded on 03/14/2012
- Doc Info:**
  - Doc Review Tasks:** A table with columns: Department, Staff, Review Status, Workflow Task.
 

Department	Staff	Review Status	Workflow Task
Building Depart...	USER 1		Plan Review
Fire Marshal	Michael Ginn		Fire Review
  - Doc Review Comments:** (Empty text area)
  - Doc Review History:** (Empty table)
  - Buttons:** Download, Review
- Form Fields:**
  - Department:** Building Department (dropdown)
  - Staff:** USER 1 (dropdown)
  - Review Status:** --Select-- (dropdown)
  - Page #:** (text input)
  - Workflow Task:** Plan Review (dropdown) with a Clear button.
  - Review Status Date:** 03/23/2012
  - Comments:** (Large text area)
- Buttons:** Menu, Assign, Delete, Help (top); Menu, Submit, Reset, Help (middle).

5. Modify the task details as needed.

6. Click **Submit** to save your changes.

## Working with Document Review Checklists

### Topics

- [Assigning One or More Checklists to a Document Review Task](#)
- [Completing a Doc Review Checklist](#)

## Assigning One or More Checklists to a Document Review Task

You can assign one or more checklists to a document review task. The checklists are the guidelines for the reviewers to follow to ensure that they review all the required aspects of a document during the document review task.

### To assign one or more checklists to a document review task



1. Locate the document you want to assign.
2. Select **View Document Info** from the **Actions** menu for the document you want to assign.  
The Document Information window launches.
3. If you have not done so yet, assign the document to a document review task. See [Assigning a Document to One or More Reviewers](#).
4. Go to the **Checklists** tab for the document with one of the following approaches:
  - Select the **Doc Review Checklists** tab;
  - Select the **Doc Review Tasks** tab. Click the link to the doc review task, and then click the Checklist tab of the doc review task.  
The Document Information window displays the checklists added to the document or document review task. The Checklist ID column is empty for the checklists which you have not assigned to any doc review task.

The tab may already display a few checklists:

- For a document which is submitted for the first time, Civic Platform automatically adds, if there are any, the Auto Create checklists in the checklist group which is associated with the document type. The Checklist ID column is empty because you have not assigned the checklist to a document review task yet.
  - For a document which is a re-submittal of an existing document, Civic Platform automatically not only carries over the open comments, but also carries over the checklist that has failed checklist items, of which administrators enabled the Carry-over Failed Items option, from the existing document. The Checklist ID shows the assigned reviewer and the assign date for each checklist as in the existing document.
5. To add more checklists to the tab, do the following:
    - a. Click **Search**.
    - b. From the Group drop-down list, choose the group that includes the checklist you want to assign to the document review task.  
Civic Platform displays a list of checklists attached to the selected checklist group.
    - c. Select the checklists you want to add. To select all checklists, mark the check box that appears at the top of the list.
    - d. Click **Submit**.
  6. To delete a checklist from the tab, select the checklist and click **Delete**.
  7. If needed, you can add more checklist items to a checklist. Do the following:
    - a. Click the link at the checklist you want to add checklist items.  
Civic Platform displays a list of checklist items included in the current checklist.
    - b. Click the **Add** link next to the Checklist Items heading in the list.  
The checklist item selection window displays.

**c.** Locate the desired checklist item.

If known, choose the checklist group and checklist that contains the checklist item from the drop-down lists, or enter the checklist item key word and click the search icon.

**d.** Select the desired checklist item, and click **Select**.

Civic Platform adds the checklist item into the checklist.

**e.** If necessary, you can click the **Delete** link next to the checklist item that you newly added to remove the item from the checklist. Note that you cannot remove a checklist item that your agency administrator configured in the checklist.

**8.** Select each checklist you want to assign and click **Assign**.

The Document Information window displays the list of existing doc review tasks for the document.



**Note:**

You can select and assign a checklist which you already assigned to a doc review task. After you assign the checklist to a new task, the previous assignment no longer exists, but the updates that the reviewers made to the checklist during the previous review task remain with the checklist.

**9.** Select the doc review task to which you want to assign the selected checklist(s) to, and click **Submit**.

The Document Information window returns to the checklists view. The Checklist ID shows the assigned reviewer and the assign date of each checklist.

## Completing a Doc Review Checklist

To complete a doc review checklist, you can enter information and update the status of each checklist item. Completion of a checklist allows you to keep a record of detailed review results, and helps to ensure consistency and completeness in carrying out the doc review task.

### To complete a doc review checklist

**1.** Find the checklist you want to complete with one of the following approaches:

- In the Document Information window for the document you are reviewing, select the **Doc Review Tasks** tab. Click the link to the doc review task, and then click the Checklist tab of the doc review task.
- In the Document Information window for the document you are reviewing, select the **Doc Review Checklists** tab.
- While reviewing the document in Adobe Acrobat Pro, click the **Open Checklists** button in the Accela Add-on Tools.

**2.** Click the link to the checklist you want to complete.

Civic Platform displays a list of checklist items.

3. You can add more checklist items to the checklist in the **Checklists** or **Doc Review Checklists** tab. Do the following:
  - a. Click the **Add** link next to the checklist Items heading in the checklist.  
The checklist item selection window displays.

- b. Locate the desired checklist item.  
If known, choose the checklist group and checklist that contains the checklist item from the drop-down lists, or enter the checklist item key word and click the search icon.
    - c. Mark the check box next to the desired checklist item, and click **Select**.  
Civic Platform adds the checklist item into the checklist.
    - d. If necessary, you can click the **Delete** link next to the checklist item that you newly added to remove the item from the checklist. Note that you cannot remove a checklist item that your agency administrator configured in the checklist.
4. Do the following to update a checklist item:
  - a. Click the arrow next to a checklist item to expand the item details.
  - b. Complete the fields in the detail section as needed.
  - c. Add a comment for the item as needed.
    - a. Click the **Standard Comment** link to select a standard comment, or manually enter the comment.
    - b. While you are reviewing the document in Adobe Acrobat Pro, if you want to add the comment as a comment in the document and associate the checklist item with the comment, mark the **Add to Document** check box. If you want to remove the comment from the document, deselect the check box.



**Note:**

If you set the checklist item to a status of the Approved result type, and the comment in the item is added in the document, Civic Platform closes the document comment when you submit the checklist. Closed document comments no longer display in Adobe Acrobat Pro in the subsequent document reviews.

In Adobe Acrobat Pro, if you set a document comment to the Canceled, Completed, or Rejected status and publish the change, Civic Platform closes the document comment but does not change the status of the corresponding checklist item.

- c. Click the **Sync** link to set up synchronization between the comment in the checklist item and the comment in the document. When you click the **Sync** link, Civic Platform automatically marks the **Add to Document** check box.

**Note:**

You must manually publish the comment in the document after they are added to the document from the checklist item.

---

- d. To upload a file to the checklist item, click the Attachment(s) icon, and follow the procedure for attaching a document as described in [Attaching Files](#).
  - e. Update the item status.
5. Repeat steps 3 and 4 until you finish updating the checklist.
  6. Click the **Submit** button to save the changes.

## Reviewing a Document in Adobe Acrobat Pro

You can launch PDF document attachments for review in Adobe Acrobat Pro from several locations in Civic Platform. After you launch a document attachment, you can make full use of Adobe Acrobat's commenting and annotation tools to mark up documents. After completing your review, you can use the Accela Toolbar Add-on tools to save your comments to the Civic Platform application server.

### Topics

- [Opening a PDF document for review from Civic Platform](#)
- [Annotating Documents](#)
- [Saving Annotations and Comments](#)
- [Viewing Other Reviewer Comments within the PDF](#)

## Opening a PDF document for review from Civic Platform

You can open a PDF document attachment in Adobe Acrobat Pro from the Documents secondary tab, the My Tasks tab, or the Global Search portlet.

**Note:**

If you do not see a Review link in these locations, either Civic Platform did not assign the listed document to you for review, or you do not have workflow supervisor access. Contact your system administrator.

---

### From the Documents tab

1. Locate and select the record containing the document you want to open.
2. Open the Documents tab for the record.
3. Identify the document you want to open and select **Review** from the Actions menu for that document.

### From the My Tasks

1. Open the My Tasks portlet and click the Document Review Tasks tab.
2. Identify the document you want to open and select **Review** from the Actions menu for that document.

### From the Global Search

1. Conduct a search for the document you want using the Document Name, Document Description, or Document Category as your search criteria.
2. In the Documents search results, identify the document you want to open, and click the **Review** link for that row.

## Annotating Documents

Adobe Acrobat Pro comes with a number of annotation tools that Civic Platform users can use as they review digital documents and digital plans for a project. Users can use Acrobat tools to comment, highlight content, insert graphical indicators, and even use 'stamps' to apply a graphical image to the pages of a PDF file. You can customize stamps to include data from the project file (e.g., application number, applicant name), the current date/time, and other relevant information.

The following sections describe some of these tools as well as some possible uses for them when reviewing plans and other project documents. You can pattern your agency's workflow from our examples. You can also use any of the additional Adobe Acrobat X Pro functionality to best help you achieve the outcome that you seek.



### Note:

This document describes only some of the many possible uses you can leverage when working with Adobe Acrobat Pro and Electronic Document Review. Adobe provides full documentation for the all of the functionality that comes with their product. Refer to the Adobe Online Help to learn about additional functionality not described in this document.



## Topics



- [Using the Accela toolbar](#)
- [Inserting Annotations and Commentary](#)
- [Using Stamps](#)
- [Using the Measuring Tool](#)

## Using the Accela toolbar

When you run the Document Review Client Installation, it installs an Adobe Acrobat plug-in that includes several buttons for you to use when you review documents/plans. See the table below for descriptions of each of the buttons available in the Accela toolbar.

Accela recommends that you publish your comments and annotations frequently to avoid loss of work in the event of an unexpected application shutdown.

	Button	Description
	Check-in Revision	Use this button to save all comments made by the current user, and merge all comments added to the document by multiple users and the original PDF file into a new document that you must name. This button is typically the final action in a review process and it is accessible only if your administrator enables FID 8474.
	e-Codes	You can add one or more buttons to your toolbar to launch pre-configured URLs in a new browser window. You must configure this button to point to the ICC eCode site that you want to reference. Your agency must have an account and licensing set up with ICC to use the site.

	Button	Description
	Publish Comments	Use this button to save comments made by the current user to the Civic Platform application server and allow others users to view the saved content. This button is typically the final action of a reviewer when all commentary is complete and ready for others to view. Note that Civic Platform saves comments to a file separate from the PDF file that you reviewed. You can merge the comments into the PDF file by using the Check-in Revision button.
	Get Updates	Use this button to save comments made by the current user to the Civic Platform application server but not allow others to view the saved comments. At the same time, Civic Platform downloads and displays any published comments by other users. Note that Civic Platform saves comments to a file separate from the PDF file that you reviewed. You can merge the comments into the PDF file by using the Check-in Revision button.

## Inserting Annotations and Commentary

You can activate the annotation and drawing markup tools in several different ways. You can select a tool from the 'Quick Tools' toolbar at the top of the window, from the Comments or Tools side panels, from a right-click menu, or by entering keyboard shortcuts to invoke certain commands. Use the method that best suits you. In this documentation, we provide instructions to access commands via the side panel. If you prefer to use another method to access quick tools, you should do so.

Click a link to learn more about common annotating tasks.

- [To insert a sticky note](#)
- [To draw a cloud around an area, an object, or a group of objects](#)
- [To draw a box around an object and commenting on it](#)

To learn more about other annotation possibilities using Adobe Acrobat tools, refer to the Adobe documentation accessible via the Help menu in Adobe Acrobat Pro.



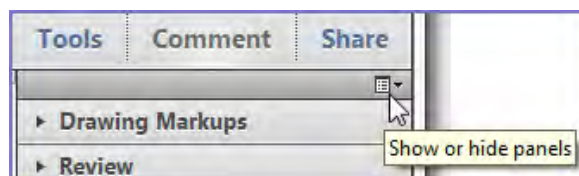
### Note:


When you review PDF attachments that are part of a Civic Platform file, it is very important that you launch the PDF from Civic Platform. You should then use the Civic Platform tools in Acrobat Pro to save your comments and annotations back to Civic Platform.

## To insert a sticky note

1. Launch the PDF you are reviewing from Civic Platform.
2. Click Comment on the right side of the toolbar to open the side panel. If you are using another method to invoke Adobe tools, skip this step.

If you do not see the Annotations panel listed, use the Show/Hide Panels button to display a menu where you can choose which panels to display. Click Annotations to show the panel. A check mark next to the name means the panel is visible.




3. Click the Add Sticky Note button  in the Annotations panel.
4. The mouse cursor changes to a sticky note.
5. Position the cursor where you want to place the sticky note on the document and click. Civic Platform places a sticky note icon and a message box displays.

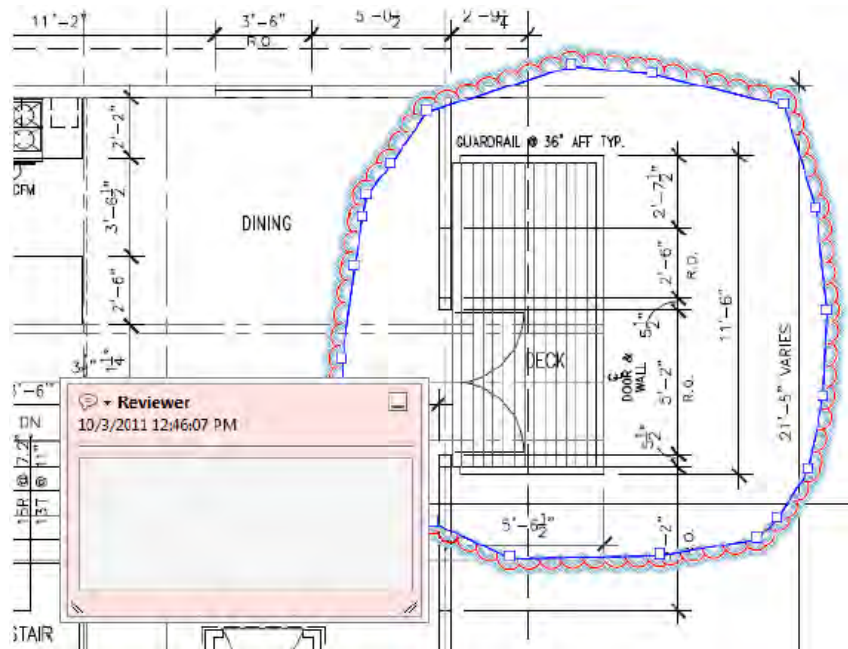


6. Enter your comments in the box.
7. To complete the task, click anywhere outside the box.
8. Use the Civic Platform toolbar to save or publish your comments.

### To draw a cloud around an area, an object, or a group of objects

A cloud is an enclosed polygonal shape you can draw around objects or areas. A cloud is consists of multiple line segments you define by clicking.


1. Launch the PDF you are reviewing from Civic Platform.
2. Click Comment on the right side of the toolbar to open the side panel and then make sure you see the Annotations panel. If you are using another method to invoke Adobe tools, skip this step.
3. Click the Cloud button  in the Annotations panel.
4. The mouse cursor changes to a pointer.
5. Position the cursor where you want to start drawing the cloud perimeter and then click to define the start point.
6. Move the pointer to the next position on the perimeter of your cloud and click to create a line segment.
7. Continue moving the pointer and clicking to define your cloud's perimeter.
8. To finish, either click the start point again, or right-click and select **Complete**.
9. To insert a comment about the area or object you just highlighted, double-click the cloud to open a message box.



10. Enter your comments, then click anywhere outside the box.

11. Use the Civic Platform toolbar to save or publish your comments.

#### To draw a box around an object and commenting on it

1. Launch the PDF you are reviewing from Civic Platform.
2. Click Comment on the right side of the toolbar to open the side panel and then make sure that you can see the Drawing Markups panel. If you are using another method to invoke Adobe tools, skip this step.
3. Click the **Rectangle** button .
4. Position the cursor where one of the corners of the rectangle is to be, then click and drag the cursor diagonally to the opposite corner of the rectangle. Release the mouse button.
5. Double-click the rectangle border to open a message box.



6. Enter your comments and then click anywhere outside the box.

7. Use the Civic Platform toolbar to save or publish your comments.



## Using Stamps

One of the Annotations tools available for you to use in Adobe Acrobat Pro is the Stamp tool. When you click the Stamp button, a menu displays. The menu offers you a list of images that you can place on a PDF document as needed with a click of your mouse button. Included in this list is a sub-set of dynamic stamps that incorporate real-time data such as the time, the date, and identity information from the Identity form in Adobe Acrobat.


You can also create custom stamps that include images of your own design. For example, you can create stamps that include your agency's name or logo. You can even create dynamic custom stamps that display the current time/date, the current user, and more.

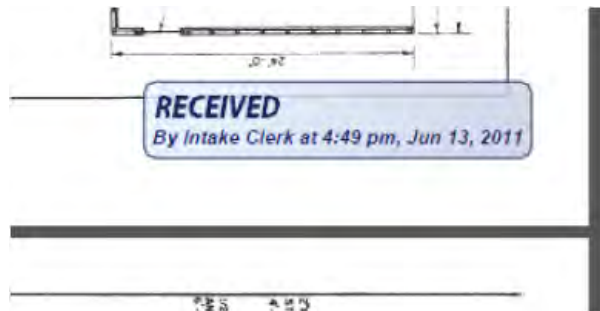


### Note:

For information about creating dynamic stamps in Adobe Acrobat Pro, check out <http://acrobatusers.com>, which is an Adobe-sponsored user community.

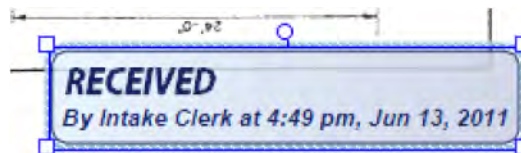
### To place a stamp on a document

1. Launch the PDF you are reviewing from Civic Platform.
2. Click Comment on the right side of the toolbar to open the side panel and then make sure you can see the Drawing Markups panel. If you are using another method to invoke Adobe tools, skip this step.
3. Click the Add Stamp button  to display a menu of available stamps.
4. Select the desired stamp from the menu.  
The mouse cursor takes on the image of the selected stamp.
5. Position the cursor where you want to place the stamp on the document and click.  
Civic Platform places the stamp.



6. Resize the stamp as needed.

- Click the stamp image to turn on the resizing handles in each corner of the image.



- Click and drag any resizing handle to make the stamp bigger or smaller. Release the mouse key when done.

7. Rotate the stamp as needed.

- Click and drag the rotate handle (rounded handle located in the upper center of the image) to rotate your stamp image to the desired orientation. Release the mouse key when done.

## 8. Add comments to the stamp as needed.

- Double-click the stamp image and enter your commentary in the box that appears.

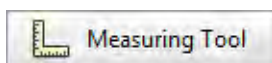


### Note:

If you are stamping the same image on multiple pages; for example, a time/date received stamp, you can use the Keep Tool Selected command to use the stamp repeatedly without having to re-select the Add Stamp button each time. Simply use the desired stamp, then right click the Add Stamp button and select Keep Tool Selected. You can now stamp your document over and over again with the click of a button.

## Using the Measuring Tool

Adobe Acrobat Pro provides you with an easy-to-use measurement tool that you can use to measure distance, perimeter, and area on a plan or drawing. You can define the units of measurement and the scale ratio of your measurements to reflect the units.



The Measuring tool is accessible from both the toolbar and the Analyze panel in the Tools panel. Before you use the Measuring tool, it is useful to set the scale ratio you want to use, so that your measurements display in the proper units.



### Note:

#### If you do not see the measuring tool in your toolbar or Tools panel

- You can add the button to the toolbar. Click the **Customize Quick Tools** button




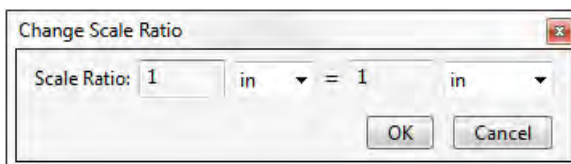
- in the toolbar and choose **Measuring Tool** from the Analyze group.
- You can add the tool to the Tools panel. Click the **Show or Hide Panels** button and select **Analyze**. The measuring tool is in that group.

## Processes

- [To set the scale ratio](#)
- [To measure the height, width, perimeter, or area of an object](#)

### To set the scale ratio

1. Click the Measuring tool  in either the toolbar or the side panel to activate it.
2. Right click anywhere on the page  
A command menu displays.
3. Click **Change Scale Ratio** to display a Change Ratio dialog.



- Enter the numbers and units of measurement that reflect the scale of the drawing to the actual size of the objects.

**Note:**

If you have a ratio that includes a fraction, such as 1/8 in = 1 ft, you can enter this ratio in two ways:


- Enter 1/8 as a decimal. Enter 0.125 in = 1 ft
- Keep the same ratio but convert the fraction to a whole number by multiplying both 1/8 inch and 1 foot by 8. Enter 1 in = 8 ft

- Click **OK**.

Your new scale ratio settings remain in effect until you change them again.

**To measure the height, width, perimeter, or area of an object**

- 1.

Click the Measuring tool  Measuring Tool in either the toolbar or the side panel to activate it.

2. Select a measurement type:



Click the distance tool to measure the distance between two points.



Click the perimeter tool to measure the outside edge of an object. You can also use this tool to measure a series of line segments that do not necessarily define a perimeter.



Click the area tool to measure the area of a region you define.

3. Draw one or more line segments to define the object that you are measuring.

- Distance: Click at one end of the line segment. Drag the mouse cursor to the other end of the line segment and then click to define the end point. Drag the measurement line to the desired location and then click again to complete.
- Perimeter: Click each point defining the line segments you are measuring in sequence. For example, click the 4 corners of a rectangle in clockwise or counter-clockwise order. Double-click the last point to complete.
- Area: Click each sequential point defining a line segment in the boundary of the region you want to measure. For example, click the 3 corners of a triangle in clockwise or counter-clockwise order. Click the first point again to complete.

4. Add a label if needed.

- Right click the measurement.
- Select **Add Label** from the command menu.
- Enter pertinent data you want to include with your measurement.
- Click **OK**.

To learn more about using the Measuring Tool or modifying the appearance of your measurements, consult the Adobe Acrobat Pro documentation.

**About Bates Numbering and Actions**

Bates Numbering is a method for numbering pages within one or more documents, such that Acrobat Pro assigns a unique Bates number to each page of each document. The unique Bates number indicates its

relationship to other Bates-numbered documents, and can also be the vehicle for adding other information such as time/date stamps. You can set up Bates numbering with the Actions wizard in Adobe Acrobat Pro. When applied to a document or series of documents, the numbering appears as a header or footer on the pages of each PDF in the batch.

Accela provides several Bates Numbering and other actions that you can use as a template or model for creating your own actions. The following procedure describes how to access the Accela-created actions, how to apply them, and how to modify them. If you want to create new Bates Numbering actions, refer to the Adobe Acrobat documentation.

### To access and apply existing actions, including the Accela created ones

1. With a PDF open, select Tools in the toolbar to expose the Tools side panel.
2. Select Action Wizard.

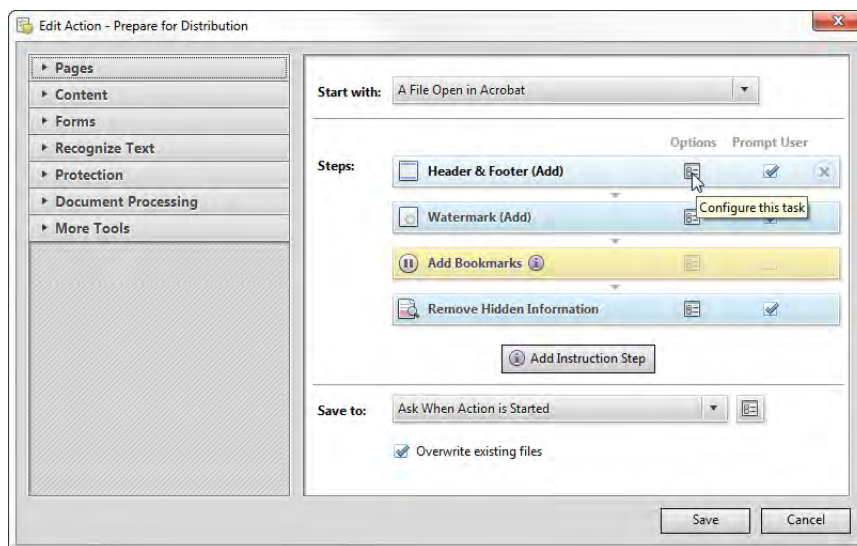
Several options become available: you can create a new action, edit an existing action, or call an existing action from the list of available actions.



3. Click an action in the list to apply it to the current document.

### To use Accela created actions as templates to create your own actions

1. With a PDF open, select **Tools** in the toolbar to expose the Tools side panel.
2. Select **Action Wizard**.
3. Select **Edit Actions**.  
An Edit Actions dialog opens.
4. Select the action you want to use as a template and click **Copy**.
5. Click the **Save** button to create a new Action that is a duplicate of the original.
6. Highlight the newly created copy and click **Rename**.
7. Give your new action a unique name. Do not use "AEDR" in the title. Click **Save**.
8. With the newly renamed action still highlighted, click **Edit**.
9. In the Edit Action dialog, click the **Configure this task** icon for the step you want to modify.



10. Use the Add Header and Footer form to make changes to the step as needed, then click **OK**.

11. Repeat the previous steps to configure additional steps if applicable.

12. Click **OK**, then click **Save**.

## Saving Annotations and Comments


You can save any annotations, comments, stamps, and measurements that you add to a document during the Electronic Document Review process, back to the Civic Platform application server for others to view. Accela recommends that you save/publish frequently. When all reviews are complete, you can then merge all the annotations, comments, stamps, and measurements together with the original PDF file and save this new document to the record with a new name. The original PDF remains in its unedited state.




### Note:

To publish commentary/annotations or check in revisions to the Civic Platform server, you must launch the document that you are reviewing from Civic Platform.

### To save/publish your annotations

1. Review a PDF document launched from Civic Platform. You may use any review tools or measurement tools available in Adobe Acrobat Pro to annotate the document.
2. Click the **Publish Comments** button  in the Accela Add-on Tools to save your work to the Civic Platform application server. Other colleagues with access to the document can view your annotations.


### To check in a document with all revisions

1. Review a PDF document launched from Civic Platform. You may use any review tools or measurement tools available in Adobe Acrobat Pro to annotate the document.
2. Click the **Check In Revision** button  in the Accela Add-on Tools to merge all saved annotations, comments, stamps, and measurements with the PDF file you are reviewing.
3. Save the new file to the Documents tab for the record, while preserving the original PDF file in submitted state. Be sure you save your file with a PDF extension (do not assume that it is appended automatically), or the file might not get checked in.

## Viewing Other Reviewer Comments within the PDF

You can view the comments, stamps, measurements, and annotations of other reviewers when you are working with Electronic Document Review documents. It can be helpful to know what other reviewers may have said or discovered.

### To get review comment updates

1. Open a PDF document from Civic Platform using the Review link
2. Click the **Get Updates** button  in the Accela Add-on Tools to publish your comments to the Civic Platform application server, and then download all comments and annotations published by other Civic Platform users for the current document.

## Interacting with Document Review Comments from Civic Platform

You can search for, review, edit or delete the comments and annotations made on a PDF attachment via the Doc Review Comments tab on the Document Information window.

### Topics

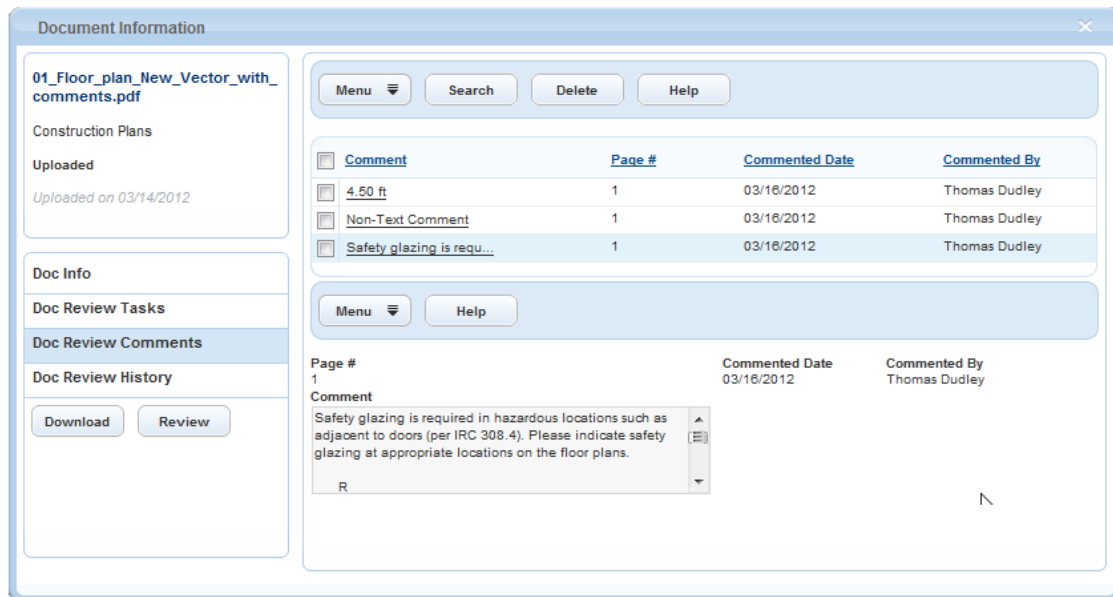
- [Viewing and Editing the Document Review Comments](#)
- [Deleting Review Comments on a Document from Civic Platform](#)

## Viewing and Editing the Document Review Comments

All comments and annotations made on a PDF document attachment by a reviewer are viewable from the Document Information window for the document after the reviewer has clicked the **Publish Comments** button in Adobe Acrobat Pro.

### To view and edit a document's comments

1. Locate the document you want to edit. You can do this by going to the Documents tab for the selected record or to the Sub Tasks tab on the Workflow page.  
You can also use Global Search to locate the document. See [Searching for a Document](#) for more information.
2. Select **View Document Info** from the **Actions** menu for the document you want to edit.  
The Document Information window launches.
3. Click the Doc Review Comments tab in the left panel.  
The Doc Review Comments page displays.



You can use Search to locate a particular comment. Search criteria include a search by document page number, by comment date, by reviewer, and by comment content. See [Using the Search Features](#) for more information about searching in Civic Platform.

#### 4. Edit the **Discipline** or **Status** of the comment as needed.

The status of a comment is either Open or Closed. In Adobe Acrobat Pro, if you set a document comment to the Canceled, Completed, or Rejected status and publish the comment, the comment status is Closed in the Doc Review Comments tab. If you change the status of a comment from Open to Closed in the Doc Review Comments tab, the comment no longer displays in Adobe Acrobat Pro in the subsequent document reviews.

If you are working on a document which is a re-submittal of an existing document, the comments list of the document includes all the Open comments of the existing document. If you open the re-submittal document in Adobe Acrobat Pro, the comments display in the document in the same position as in the previous document.

#### 5. Click the link at the comment to view the comment details. If the comment is added from a checklist item, the checklist item information displays as read-only with the comment details

## Deleting Review Comments on a Document from Civic Platform

You can remove review comments from a document via the Doc Review Comments tab on the Document Information window.



#### Note:

There are 2 reasons to be careful when deleting comments:

- 1) Removing comments from the Doc Review Comments tab in Civic Platform replicates to the document itself. After you remove the comments in Civic Platform, they disappear in the PDF as well.
- 2) Civic Platform does not prompt you to confirm the deletion. The second you click **Delete**, the action is irreversible.

### To remove one or more review comments

#### 1. Access the Doc Review Comments tab for the desired document as described in [Viewing and Editing the Document Review Comments](#).

The Doc Review Comments page displays.

2. Select each comment you want to delete.

The Document Information window launches.

3. Click the **Delete** button.

Civic Platform removes the comments in both Civic Platform and in the PDF document.

## Viewing the Document Review History for a Document

You can use the Doc Review History tab on the Document Information window to view a historical listing of information about interactions with the document, beginning with the initial upload of the document and including any saves, check-in actions, and re-submissions.

### To view the document review history

1. Locate the document you want to work with. You can do this by going to the Documents tab for the selected record or to the Sub Tasks tab on the Workflow page.

You can also use Global Search to locate the document. See [Searching for a Document](#) for more information.

2. Select **View Document Info** from the **Actions** menu for the document you want to edit.

The Document Information window launches.

3. Click the Doc Review History tab in the left panel.

The Doc Review History page displays.

Document Information

01\_Floor\_plan\_New\_Vector\_with\_comments.pdf

Construction Plans

Uploaded

Uploaded on 03/14/2012

Doc Info

Doc Review Tasks

Doc Review Comments

Doc Review History

Download Review

Checked in on 03/23/2012 as 01\_Floor\_plan\_New\_Vector\_with\_comments20120323135942[1].pdf.

Document Status	Document Status Date	Action By
Uploaded	03/23/2012 13:01:15	Administrator J...

Review Status Review Status Date Reviewer Action By

0 record(s) found.

First uploaded on 03/14/2012 as 01\_Floor\_plan\_New\_Vector\_with\_comments.pdf.

Document Status	Document Status Date	Action By
Uploaded	03/14/2012 18:59:05	Administrator J...

Review Status	Review Status Date	Reviewer	Action By
N/A	03/23/2012 10:55:57	TEST1/PETALUMA/FIRE/FIRE/NA/NA/CITYHALL Michael Ginn	Adrr
N/A	03/23/2012 10:55:57	TEST1/PETALUMA/COMMDEVE/BUILDING/NA/NA/CITYHALL USER 1	Adrr
N/A	03/23/2012 11:01:55	TEST1/PETALUMA/COMMDEVE/BUILDING/NA/NA/CITYHALL USER 1	Adrr

03/23/2012 13:01:13 Administrator J...

Review Status Review Status Date Reviewer Action By

0 record(s) found.

4. View additional details by clicking the right-arrow carets in the left column.



# Enforcement

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Choose a topic from the list below to learn more about working with enforcement cases.

## **Related Information**

[Enforcement Overview](#)

[Creating a New Case](#)

[Managing Citations](#)

[Managing Evidence for a Case](#)

[Examining Enforcement \(and Related\) Details](#)

## Enforcement Overview

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You can collect, manage, and resolve enforcement cases concerning complaints and violations against specific individuals, properties, owners, contractors, or businesses. Based on the severity of a violation, you can issue a citation. Civic Platform stores citations that users create, along with any collected evidence, in the appropriate case record along with court dates and defendant information.

### **Use Case**

A citizen registers a complaint about an abandoned vehicle on private property. The complaint routed to code enforcement for the police to check for involvement in criminal activity. The police discover the vehicle is being stored illegally on private property. Code enforcement issues a citation for trespassing and abandoning a vehicle to the vehicle owner, and they schedule a hearing date for the defendant to appear in court. Pictures of the car and the car contents might be used at the hearing to support the legal claim. Between the time of the citation and the hearing, the car and the pictures might be held at various locations for investigation. Civic Platform tracks and stores this information for each case.

## Creating a New Case

When you create a new case, you can then collect information about a violation by or a complaint against individuals, properties, owners, contractors, and businesses. In addition to the original complaint or violation, any citations, and any court information, can be tracked. You can associate incidents, other cases, citations, and evidence to the case.

Civic Platform reviews and prioritizes the cases by severity, and agencies can configure Civic Platform to add the cases to a workflow to accommodate an agency's business rules. For example, an agency receives a complaint of an abandoned vehicle and they need to route it to the police for investigation. A workflow that the agency created notifies the police department when the agency receives this type of complaint. The police department uses the information in the open case to find the abandoned vehicle and complete their investigation. Civic Platform records any citations issued under the initial case along with the applicable court hearing information.

### To create a new case

1. Go to the Enforcement portlet.

Civic Platform displays the Enforcement case list portlet.

<input type="checkbox"/> Record #	Status	Record Type	Opened Date	Street #	Dir	Street Name	Type	Unit #	First
<input type="checkbox"/> CMP-2012-00021	Received	Complaint	06/08/2012	100	N	Main	St		Carl
<input type="checkbox"/> ENF-2012-00028	Investigation Pending	Working Without Permit Violation	05/07/2012	2012		Bishop	Dr		Mike
<input type="checkbox"/> CMP-2012-00020	Assigned	Complaint	05/06/2012	2012		Bishop	Dr		Mike
<input type="checkbox"/> CMP-2012-00018	Received	Complaint	04/17/2012	2012		Bishop	Dr		Bob
<input type="checkbox"/> CMP-2012-00019	Received	Complaint	04/17/2012	2012		Bishop	Dr		Bob

2. Click **New**.

Civic Platform displays the Record Type Select dialog.

3. From the **Group** drop-down list, select the enforcement group you want.

Civic Platform displays a list of enforcement application types.

4. From the **Type** drop-down list, select the type of enforcement application you want to create.

Civic Platform displays the Subtypes and Categories drop-down lists of case application types.

Record Type Select - Windows Internet Explorer

Cancel Help

Record Type

Group Type Subtype Category

Enforcement Incident Abatement -Select-

5. Optional: Select the Subtype and Category, if available. Some agencies use Subtype and Category to define the enforcement application that they want to create.

Civic Platform creates and displays an enforcement form based on your choices.

6. Complete the fields with available data. See [Case Application Field Definitions](#) for field definitions.

7. Click **Submit**.

Civic Platform generates a case application number (Record ID) and then updates the contact list and owner list.

## Managing Citations

The ability to create citations in Civic Platform enables you to keep track of offenses, violators, enforcement officers, dates, and other information relevant to the violations that require citations.



**Note:**

It is good practice to use the same citation number for both the citations recorded in Civic Platform and the corresponding official citation documents.

### Topics

- [Adding, Editing, and Deleting Citations](#)
- [Managing Defendants](#)
- [Managing Violations](#)

### Adding, Editing, and Deleting Citations

After you add a citation, you can add defendants and violations as appropriate. For information, see [Managing Defendants](#) and [Managing Violations](#).

1. Open the Enforcement portlet and locate the case record you want to modify.

2. Click the Citations tab.

Civic Platform displays the citation summary and citations associated with the case.

#### Citation Summary

**Case #:**    
**Case Type:** [Enforcement](#) / [Rental Housing Inspection](#) / [Property](#) / [RHIP](#)  
**Address:** ,  
**Owner Name:**  
**Owner Address:**  
**common.applicationname.label :**  
**Violator Name:** [Adam Brown](#)

Citation				<input type="button" value="Add"/>
Citation #	Date	Violation Address	Enforcement Officer	
<a href="#">PTL-RHIP2012-00511</a>	01/29/2013	253 Sanfrancisco, CA ,		<input type="button" value="Delete"/>

3. Do one of the following:

**To add a new citation:**

a. Click **Add**.

Civic Platform displays the citation form.

b. Complete the fields with available data (see [Citation Fields](#) for field definitions).

c. Click **Submit**.

**To edit a citation:**

a. Click the **Citation #** link that you want to edit.

- b. Click **Edit** and modify the fields as needed.
- c. Click **Save**.

**To delete a citation:**

- a. Click **Delete** next to the citation you want to delete.

## Managing Defendants

Defendants are individuals that are scheduled to appear in court regarding a citation. Civic Platform stores a defendant's contact information and court information along with the citation data for reference.

### Adding, Editing, and Deleting Defendants

A citation issued to an individual may require that the individual appear in court. These individuals are referred to as defendants. You can use Civic Platform to add them to the citation. To add a defendant to a citation you open the initial case or complaint and then select the applicable citation.

1. Open the Enforcement portlet and locate the case record you want to modify.
2. Click the Citations tab.  
Civic Platform displays the citation summary and citations associated with the case.
3. Click the **Citation #** link of the citation you want to work with.
4. Do one of the following:

**Add a defendant**

- a. In the Defendant section, click **Add**.  
Civic Platform displays the Defendant—New window.

Defendant - Edit Search

Citation #: PTL-RHIP2012-00511

Name(F \* /M/L \* ): Adam   Brown

Violator Address:

City:  State:  Zip:

Country:

Notes:  
(max 240 char)

Primary Defendant:  Yes  No

Birth Date:  Gender:

Social Security #:  Eye Color:

ID (Issue State):  Hair Color:

ID #:  Height (ft' in"):

Vehicle ID:  Weight (lbs):

- b. Complete the form with available data (see [Citation Defendant Fields](#) for field definitions).
- c. Click **Save**.  
Civic Platform adds the defendant to the citation.

**Edit defendant data**

- a. Click the link to the defendant you want to edit.  
Civic Platform displays the defendant details.
- b. Modify the fields as needed.
- c. Click **Save**.  
Civic Platform saves the defendant details.

Delete a defendant

- a. Click **Delete** next to the defendant you want to delete.  
Civic Platform deletes the defendant from the citation.

## Managing Violations

Your agency administrator set up violations. When you apply a violation to a citation, you can choose from a list of standard violation codes.

### Adding a Violation to a Citation

You can add violations that occur in reference to a citation, to the citation record.

#### To add a violation to a citation

1. Open the Enforcement portlet and locate the case record you want to modify.
2. Click the Citations tab.  
Civic Platform displays the citation summary and citations associated with the case.
3. Click the **Citation #** link for the desired citation.  
Civic Platform displays the citation details.
4. In the Violation section, click **Add**.  
Civic Platform displays the Violation—Add form.
5. Select the applicable violation code from the **Violation Codes** drop-down list.
6. Click **Save**.

## Managing Evidence for a Case

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Law enforcement authorities and case investigators collect facts to support a claim that requires discussion, decision, or investigation. Civic Platform provides the ability to collect and manage such facts. Any material object or any paraphernalia admissible as testimony in a court of law for a case may be evidence. You can upload documents into Civic Platform as evidence. If the same evidence applies to multiple cases, you can clone the evidence and apply it to an existing case or to a case created using the Record from Model feature.

You can check evidence in and out from Civic Platform. Chain of custody and disposition of evidence can be tracked with supervisory access to Civic Platform. For example, an investigator needs to take evidence to a laboratory for analysis. A user with supervisor permission checks out the item and comments that he checked out the item to deliver it to XYZ Laboratories. Civic Platform stamps the entry with the date and time, then saves the transaction to history. When the evidence returns from the laboratory, the user with supervisor permission checks the evidence back into Civic Platform and specifies the location, which is storage area C at Building ABC. Civic Platform saves data about the item, the date/time, and the item's history.

### Topics

- [Adding Evidence](#)
- [Attaching a Document as Evidence](#)
- [Viewing and Updating Evidence](#)
- [Viewing Evidence History](#)
- [Changing Evidence Status](#)

### Adding Evidence

1. Open the Enforcement portlet (typically found on the Enforcement console tab) and locate the case record you want to add evidence to.
2. Select the Evidence tab.  
Civic Platform displays the Evidence list portlet.
3. Click **New**.  
Civic Platform displays the Evidence New form.

**Evidence New**

Menu ▾ Submit Reset Cancel Help

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Evidence

<b>Location *</b> <input type="text" value="--Select--"/>	<b>Description *</b> <input type="text"/>	<b>Chain of Custody *</b> <input type="text" value="CHECKED IN"/>
<b>Serial No</b> <input type="text"/>	<b>Units</b> <input type="text"/>	
<b>Evidence Type *</b> <input type="text" value="--Select--"/>	<b>Units of measure</b> <input type="text" value="--Select--"/>	
<b>Disposition</b> <input type="text" value="--Select--"/>	<b>Value</b> <input type="text"/>	
<b>Comments</b> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

[check spelling](#)

4. Complete the form with available data (see [Evidence Fields](#) for field definitions).

5. Click **Submit**.

## Attaching a Document as Evidence

You can collect document or images and add them to a case as evidence. For further information about uploading and accessing documents, see [Attachments](#) .

### To attach a document as evidence for a case

1. Open the Enforcement portlet and locate the case record to which you want to add evidence.
2. Select the Evidence tab.  
Civic Platform displays the Evidence list portlet for the case.
3. Choose the Evidence Type associated with your document.  
Civic Platform displays the Evidence details.



- Click the Documents tab.  
Civic Platform opens the Evidence Document portlet.

- Click **New**.  
Civic Platform displays the Evidence Document screen.

- Complete the fields with available data (see [Examining Attachment Details](#) for field definitions).
- Click **Submit**.  
Civic Platform uploads the document.

## Viewing and Updating Evidence

- Open the Enforcement portlet and locate the case record to which you want to add evidence.
- Click the Evidence tab.  
Civic Platform displays the Evidence list portlet with all evidence for the case listed.
- Choose the evidence record you want to view/update.  
Civic Platform displays the evidence details for the item.
- Enter any new data as needed (see [Evidence Fields](#) for field definitions).

- Click the **Submit** button.  
Civic Platform updates the evidence record.

## Viewing Evidence History

The evidence history provides details about any modification to the chain of custody, including who checked evidence out, where they took the evidence, and when they transported the evidence.

### To view evidence history

- Open the Enforcement portlet (typically found on the Enforcement console tab) and locate the case record you want to add evidence to.
- Select the Evidence tab.  
Civic Platform displays the Evidence list portlet.
- Choose the evidence for which you want to view a history.  
Civic Platform opens the Evidence Detail form.
- Click the History tab.  
Civic Platform displays the historical tracking for the evidence.

Evidence Type	Description	Location	Chain of Custody	Date/Time	Record By	Value	Units	Units of measure
Other	testimony tape	wuhan	CHECKED IN	01/28/2013 19:19:11 07:19 PM	ADMIN			

## Changing Evidence Status

A user with normal permissions can view the Status field as read-only at any time. However, only a supervisor can make changes to the custody status in Evidence History. For information about viewing evidence history, see [Viewing Evidence History](#).

### To change evidence status

- Open the Enforcement portlet.
- Click the Evidence tab.  
Civic Platform displays the Evidence list portlet.
- Locate and select the item you want to modify from the Evidence List.  
Civic Platform opens the Evidence Details.

Location	Description	Chain of Custody
wuhan	testimony tape	CHECKED IN
Serial No	Units	Record By
		ADMIN
Evidence Type	Units of measure	
Other		
Disposition	Value	
Comments	Date/Time	
	01/28/2013 19:19:11 07:19 PM	

- Select a chain of custody status from the drop-down list. See [Chain of Custody Fields](#) for the options available to you.

5. Click **Submit**.

## Examining Enforcement (and Related) Details

The following tables list and define the default fields available when working with Enforcement cases and citations.

- [Case Application Field Definitions](#)
- [Citation Fields](#)
- [Citation Defendant Fields](#)
- [Evidence Fields](#)
- [Chain of Custody Fields](#)

### Case Application Field Definitions

The table shown below lists and defines the default fields available when working with Case Applications.

Table 35: Case Application Field Definitions

<b>Alt ID</b>	An alternate ID used to identify the case application.
<b>Assigned Date</b>	The date that the case application assignment to a department or individual occurs. Click the calendar icon located next to the From and To fields to specify a date range.
<b>Assigned To Department</b>	The department responsible for the case application.
<b>Assigned to Staff</b>	The individual within a department that is responsible for the application.
<b>Anonymous</b>	Indicates whether the complaint caller elects not to reveal his identity.
<b>Brief Description</b>	A brief description to help identify the case application.
<b>Record Description</b>	A brief description of the case application.
<b>Record ID</b>	The number used to identify the case application. Civic Platform generates a record ID when you create a case. Users cannot modify the record ID. However, you can create an alternate ID if needed.
<b>Record Name</b>	The name of the enforcement case.
<b>Record Type</b>	The type of application.
<b>Channel Reported</b>	The incoming channel through which an applicant submitted the application request or complaint. For example, the case application might come through the mail, email, public internet site, or phone call.
<b>Citation #</b>	The citation number for the case application.
<b>City</b>	The city designation to the primary address associated with the case application.
<b>Closed By</b>	The user that closed the request or complaint.
<b>Closed Date</b>	The date the case application was closed. Click the calendar icon located next to the From and To fields to specify a date range.
<b>Closed Department</b>	The department responsible for closing the Record.
<b>Closed Staff</b>	The individual responsible for the case application.
<b>Contact Email</b>	The email address of the primary contact associated with the case application.
<b>Contact First Name</b>	The first name of the primary contact associated with the case application.
<b>Contact Last Name</b>	The last name of the primary contact associated with the case application.

<b>Contact Middle Name</b>	The middle name of the primary contact associated with the case application.
<b>Contact Relationship</b>	The primary contact's relationship to this case application.
<b>Contact Type</b>	The type of contact associated with the case application, such as "applicant."
<b>Detailed Description</b>	Enter a detailed work description of the case application.
<b>Enforcement Officer Name/ID</b>	The name or ID of the enforcement officer.
<b>Email</b>	The email address of the primary contact associated with the case application.
<b>First Name</b>	The first name of the primary contact associated with the case application.
<b>Last Name</b>	The last name of the primary contact associated with the case application.
<b>Middle Name</b>	The middle name of the primary contact associated with the case application.
<b>Opened Date</b>	The date that Civic Platform created the case application record.
<b>Opened Department</b>	The department responsible for creating the Record.
<b>Opened Staff</b>	The individual responsible for creating the case application.
<b>Organization Name</b>	The primary contact associated with the case application, such as the name of the organization to which the contact belongs.
<b>Owner Name</b>	The primary owner associated with the case application.
<b>Priority</b>	The priority level for the case application.
<b>Reported Date</b>	The date that your agency received the case application.
<b>Reported Time</b>	The time that your agency received the case application.
<b>Reported Type</b>	The type of complaint or incident.
<b>Status</b>	The status of the case application, such as Opened, Closed, and Unassigned.
<b>Sub Type</b>	A more specific classification for the Record.

## Citation Fields

The table shown below lists and defines the default fields available when working with Citations.

Table 36: Citation Field Definitions

<b>Appearance Date</b>	The date that the defendant must appear in court.
<b>Booking</b>	Indicates if there was a booking with the citation.
<b>Citation #</b>	The identification number of the citation.
<b>City</b>	The name of the city where the citation was enforced.
<b>City</b>	The name of the city wherein resides the court that is responsible for hearing the complaint.
<b>Civil Case #</b>	The civil case number corresponding to a citation and a case number.
<b>Comment</b>	Any comments regarding the citation.
<b>Court Address</b>	The address of the court responsible for hearing the complaint.
<b>Court Code</b>	The name or abbreviation of the court responsible for hearing the complaint.
<b>Date</b>	The issued date of the citation.
<b>Defendant Signature</b>	Indicates whether the defendant signed the complaint.
<b>Enforcement Officer</b>	The name of the officer who issued the citation.
<b>Enforcement Officer ID</b>	The identification number of the officer who issued the citation.
<b>Infraction</b>	Indicates whether an infraction took place.

<b>Inspector ID</b>	The identification number of the inspector who discovered or reviewed the violation.
<b>Misdemeanor</b>	Indicates whether a misdemeanor occurred.
<b>Offense Witnessed</b>	Indicates whether there was a witness to the offense.
<b>Phone</b>	The courthouse phone number
<b>State</b>	The name of the state where the violation occurred.
<b>State</b>	The state where the court is located.
<b>Violation Address</b>	The address of the violation.
<b>Violation Location</b>	A description of the location where the violation occurred. A description helps when you cannot provide an address, street name, or building location.
<b>Zip</b>	The zip code where the violation occurred.

## Citation Defendant Fields

The table shown below lists and defines the default fields available when working with Citation defendants.

Table 37: Citation Defendant Field Definition

<b>Birth Date</b>	The birth date of the defendant.
<b>City</b>	The city for the defendant's address.
<b>Country</b>	The country for the defendant's address.
<b>Eye Color</b>	The defendant's eye color.
<b>Gender</b>	The defendant's gender.
<b>Hair Color</b>	The defendant's hair color.
<b>Height (feet ' inches ")</b>	The height of the defendant.
<b>ID #</b>	Enter the defendant's official identification number. F
<b>ID (Issue State)</b>	The state that issued an ID number to the defendant.
<b>Name (F/M/L)</b>	The first, middle, and last name of the defendant.
<b>Notes</b>	Any additional comments about the defendant.
<b>Primary Defendant</b>	Indicates whether the defendant is the primary defendant.
<b>Social Security #</b>	The social security number of the defendant.
<b>State</b>	The state for the defendant's address.
<b>Vehicle ID</b>	The defendant's vehicle identification number or license plate number for any vehicle involved in the citation.
<b>Violator Address</b>	The address of the defendant.
<b>Weight (lbs.)</b>	The weight of the defendant in pounds.
<b>Zip</b>	The zip code for the defendant's address.

## Evidence Fields

The table shown below lists and defines the default fields available when working with evidence.

Table 38: Evidence Fields and Field Descriptions

<b>Chain of Custody</b>	The status for the evidence. Only a user with supervisor rights can modify this field.
<b>Comments</b>	An area to provide more information about the evidence.

<b>Date/Time</b>	The time and date of the transaction. Civic Platform automatically provides the information for this field.
<b>Description</b>	A brief description about the evidence.
<b>Disposition</b>	The reason that an item is checked out or locked.
<b>Evidence Type</b>	The type of evidence. Use this as a way to organize evidence.
<b>Location</b>	The current physical location for the evidence.
<b>Record By</b>	The name of the user who last modified the record.
<b>Serial No</b>	The serial number of the evidence item. For example, a serial number for a firearm.
<b>Units</b>	The quantity for the units of measure.
<b>Units of Measure</b>	The form of measurement used to quantify the content. For example, ounces, pounds, inches, feet.
<b>Value</b>	The dollar value of the item, (how much it is worth).

## Chain of Custody Fields

The table shown below lists and defines the default fields available when working with Chain of Custody.

Table 39: Chain of Custody Field Options

<b>Checked In</b>	Indicates that the item is checked in at the primary holding location. When adding new evidence to a case, this is the default.
<b>Checked Out</b>	Indicates that the item has moved to a location other than the primary location.
<b>Locked</b>	Indicates that the item is locked and cannot be moved to another holding location.

# Inspections

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Choose a topic from the list below to learn more about working with inspections.

## **Related Information**

[Working with Inspections](#)

[Working with Checklists and Route Sheets](#)

[Working with Inspection Conditions](#)

[Attaching Documents to an Inspection](#)

[Examining Inspection \(and Related\) Details](#)



## Working with Inspections

---

There are many tasks that you can perform when working with inspections. Choose from the list of topics below for information about working with inspections.

### Topics

- [About Scheduling Inspections](#)
- [Scheduling an Inspection from the Record Portlet](#)
- [Scheduling an Inspection from the Inspections Portlet](#)
- [Carrying Over Checklist Items](#)
- [Viewing Inspection Statistics](#)
- [Editing Inspection Milestones](#)
- [Rescheduling an Inspection](#)
- [Cancelling an Inspection](#)
- [Transferring Inspections](#)
- [Adding Related Inspections](#)
- [Displaying an Inspection in Citizen Access](#)
- [Working with Inspections in Accela GIS](#)
- [Managing Pending Inspections](#)
- [Copying an Inspection](#)
- [Editing a Default Inspection](#)
- [Assigning an Inspection](#)
- [Entering Inspection Results](#)

### About Scheduling Inspections

Your agency administrator configures the inspection types that are available for scheduling in an application. Your agency administrator can also configure the maximum number of inspections per day for an inspector (although users with supervisory privileges can schedule inspections that exceed the maximum number of inspections, or on holidays or weekends).

After selecting the application for which to schedule inspections, you can specify when each inspection should occur, and by which inspector. If your agency predefines an inspection flow or a series of milestones, you must follow the orders in the milestones to schedule inspections. Inspections can be scheduled in multiple ways:

- Specify an exact date and time for the inspection to occur.
- Specify an estimated date and time of the inspection.
- Schedule the inspections automatically (if configured).

You can schedule multiple inspections for the same application, and can also schedule inspections from different inspection groups. The inspector follow the checklist of each inspection to complete all the inspections required in an application, and can conduct both the necessary workflow inspections and other inspections that do not affect the inspection workflow.

If you prefer, you can schedule the date and time now and then assign an inspector later.

## Scheduling an Inspection from the Record Portlet

You can schedule an inspection by parcel, discipline, date, and 'completed by' time. An inspector can receive an assignment manually, or automatically based on the schedule detail, such as department, date, and time.

### To schedule an inspection from the Record portlet

1. Navigate to the Record portlet.
1. Use search to locate the application you want to work with. See [Using the Search Features](#) for more information about performing searches.
2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Inspections tab in the details portlet.  
Civic Platform displays a list of the assigned inspection types for the selected application.
4. Hover your mouse cursor on **Manage Inspections** and select **Schedule Inspections**.  
Civic Platform displays the Pending Inspections portlet.
5. Select the inspection group containing the inspection types you want to schedule from the **Inspection Group** drop-down list.  
Civic Platform displays the selected inspection group and associated inspection types in the Available Inspection Types box.
6. Select the inspection types you want to schedule from the Available Inspection Types list.
7. Click the right arrow button to move the selected inspection types to the Selected Inspection Types list.  
Civic Platform automatically adds the new inspections to the list of pending inspections at the bottom of the page and auto-checks the new inspections for scheduling.
8. Do one of the following:
  - To create pending inspections:
    1. Click **Pending Inspections**.  
Civic Platform sets all selected inspections to pending and prompts you to close the window.
    2. Click **OK** to return to the Inspections portlet.
  - To schedule an inspection:
    1. Click **Schedule Inspections**.
    2. Complete the fields in the Schedule Inspections portlet. For a complete list of fields, see [Inspection Scheduling and Results Fields](#).
    3. Click **Submit**.  
Civic Platform displays a confirmation message.

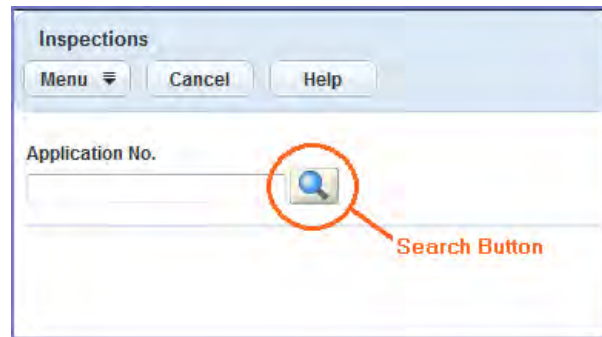
## Scheduling an Inspection from the Inspections Portlet

There are two ways to schedule an inspection from the Inspections portlet. Which method is available depends on your agency's configuration.

- [Using the Manage Inspections Button to Schedule an Inspection](#)
- [Using the New Button to Schedule an Inspection](#)

### Using the Manage Inspections Button to Schedule an Inspection

1. Navigate to the Inspections portlet.  
Civic Platform displays a list of inspections.
2. Hover your mouse over **Manage Inspection** to display a command menu.
3. Select **Schedule Inspections**.  
Civic Platform displays the Pending Inspections portlet.



4. You can locate and select one or more records by doing one or both of the following:
  - Enter an application number in the **Application No.** field and click **Search**.  
Civic Platform lists the application record meeting the search criteria that you entered, along with inspection setup fields.
  - Leave the field blank and then click **Search** to open a page containing additional search criteria you can use to locate the records you need.
    1. Enter search criteria and then click **Submit**.  
Civic Platform lists the application records meeting the search criteria that you entered.
    2. Select each application record you want to schedule inspections for.
    3. Click **Submit**.  
Civic Platform lists the selected records, along with inspection setup fields. If you perform more than one search on different criteria and select application records from multiple search result sets, your selections append to the list of previous selections. This multiple search process enables you to schedule several inspections for different applications at the same time.

5. After you have selected all the application records you want to work with, select the inspection group containing the inspection types you want to schedule from the **Inspection Group** drop-down list. Civic Platform displays the selected inspection group and associated inspection types in the **Available Inspection Types** box.
6. Highlight the inspection type(s) you want to schedule.
7. Use the right arrow button to move the selected inspection type(s) to the **Selected Inspection Types** box. The selected inspection type(s) now appear in the **Selected Inspection Type** box.
8. Do one of the following:
  - Click **Pending Inspections** to request an inspection for an application, then click **OK**. A confirmation message displays.
  - Click **Schedule Inspections** to schedule an inspection for an application, complete fields as needed, then click **Submit**. Civic Platform displays a confirmation message.

## Using the New Button to Schedule an Inspection

1. Navigate to the Inspections portlet. Civic Platform displays a list of inspections.
2. Click **New**. Civic Platform displays a search portlet.
3. You can locate and select one or more records by doing one or both of the following:
  - Enter a record number in the **Record #** field and click the **Search** button.

Civic Platform lists the application record that meets the search criteria that you entered, along with inspection setup fields.

- Leave the field blank and then click the **Search** button to open a page containing additional search criteria you can use to locate the records you need.
  1. Enter search criteria and then click **Submit**.  
Civic Platform lists the application records meeting the search criteria that you entered.
  2. Select the record you want to schedule inspections for.
  3. Click **Submit**.  
Civic Platform lists the selected records.

The screenshot shows a web interface titled "Inspections". At the top, there are four buttons: "Menu" (with a dropdown arrow), "Submit", "Reset", and "Help". Below these buttons is a search field labeled "Record #" with a magnifying glass icon to its right. Underneath the search field, the text "Selected Records" is circled in red, and below it, the record number "12CAP-00000166" is displayed.

4. Select the inspection group containing the inspection types you want from the **Inspection Group** drop-down list.  
Civic Platform displays the selected inspection group and associated inspection types.
5. Select the inspection type you want to schedule.
6. Select **Required** or **Optional**.
7. Click **Submit**.  
Civic Platform displays the selected inspection details of the record.
8. Complete the fields in the Inspections portlet with available data. See [Inspection Scheduling and Results Fields](#) for a list of fields and definitions.
9. Click **Submit**.  
Civic Platform displays a confirmation message.

## Carrying Over Checklist Items

If your agency administrator enabled the checklist item carry-over feature, when you schedule an inspection in an application, if some previous inspection in the application has failed checklist items that are still hanging, the new inspection carries over the failed checklist items.

### To carry over failed inspection items

1. Navigate to the Record portlet, and use Search (See [Using the Search Features](#) ) to locate the application you want to work with.
2. Click the Inspections tab.
3. Hover your mouse over the **Manage Inspection** button to display a command menu
4. Select **Schedule Inspections**.  
Civic Platform displays the Schedule Inspections portlet.

5. Complete the fields. See [Inspection Scheduling and Results Fields](#) for field definitions.

6. Click **Submit**.

If someone canceled, rescheduled, or completed an inspection of the same type in the application, and the inspection contained failed checklist items which are still hanging, Civic Platform displays the Carryover checklist items page.

Carry over the following guide sheet items:				
<input type="button" value="Menu"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>				
Permit No.	Inspection	Guide Sheet	GuideSheet ID	Guide Sheet Item
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check clearances from building openings, grade, ro...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check clearances from building openings, grade, ro...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check clearances in front of service for working s...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check clearances in front of service for working s...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check for a grounding electrode connection(s), if ...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check for a grounding electrode connection(s), if ...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check service riser and conductors for damage or f...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Check service riser and conductors for damage or f...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Meters shall be properly addressed when a multi un...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Meters shall be properly addressed when a multi un...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		No repair work is allowed under this permit. Blank...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		No repair work is allowed under this permit. Blank...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		SMUD Safety Inspection Checklist COMPLETE
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		SMUD Safety Inspection Checklist COMPLETE
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Verify that interior wiring is covered and safe to...
<input type="checkbox"/> MTS12-00000-00033	10 Bldg-Foundat...	SMUD Safety Che...		Verify that interior wiring is covered and safe to...

7. Select the checklist items you want, then click **Submit**.

Civic Platform carries over the failed checklist items and schedules an inspection.

## Viewing Inspection Statistics

Before you assign an inspection task, you might find it useful to review inspector information, such as availability. You can also view an inspector’s previous work status and compare it to other inspectors’ workloads. You can view inspection statistics to perform these tasks.

### To view inspection statistics

1. Navigate to Inspections portlet.
2. Hover your mouse cursor over the Menu button to display a command menu, then select **Statistics**.  
Civic Platform displays the statistics page.
3. Choose a department, an inspector, schedule date from and schedule date to from the drop-down lists.
4. Click **Submit**.  
Civic Platform returns the inspector's statistics.

## Editing Inspection Milestones

The agency administrator may have set an inspection flow or a milestone order that determines which inspections that the agency must complete, as well as the order of the inspections in the workflow. After an inspection flow begins, the inspector cannot schedule inspections out of order. Agency personnel must complete previous required inspections in the workflow before the inspector can schedule the next inspection.

However, users with supervisory privileges can edit inspection milestones within individual applications. After the supervisor updates the inspection milestone values in the application, Civic Platform regenerates the inspection flow data based on the new inspection milestone values.

### To edit inspection milestones

1. Locate the application you want to work with.

Civic Platform displays the application record.

2. Click the Inspections tab.  
Civic Platform displays the Inspections tab.
3. Click **Edit Flow**.  
Civic Platform displays the Edit Milestones page.
4. In the **Milestone** field for each inspection type, enter a non-negative integer that represents the checkpoint for that type.
5. Select Required or Optional to indicate whether an inspector can schedule inspections within the next milestone before completing the current inspection
6. Click **Submit**.  
Civic Platform updates the milestone order.

## Rescheduling an Inspection

There are many reasons that you might need to reschedule an inspection. You may need to reschedule an inspection because a contractor did not finish the work on time or perhaps the inspector did not have time to do the inspection on the originally scheduled date.

You can reschedule an inspection via the Service Request /Building portlet or the Inspection portlet.



### Note:

If you reschedule an inspection from a group that is not the default inspection group, the rescheduled inspection does not affect the inspection workflow.

---

## Topics

- [Rescheduling an Inspection from the Building Portlet](#)
- [Rescheduling an Inspection from the Inspections Portlet](#)

## Rescheduling an Inspection from the Building Portlet

1. Locate and open the application you want to work with.  
Civic Platform displays the application details.
2. Click the Inspections tab.  
Civic Platform displays a list of scheduled and completed inspections.
3. Select each inspection you want to reschedule.
4. Hover your mouse over **Manage Inspection** to display a command menu, then select **Reschedule Inspections**.  
Civic Platform displays the Reschedule Inspections portlet.
5. Complete the fields in the Schedule Inspections portlet. For a list field descriptions, see [Inspection Scheduling and Results Fields](#).
6. Click **Submit**.  
Civic Platform confirms rescheduled inspection.

## Rescheduling an Inspection from the Inspections Portlet

You can reschedule inspections from the Inspections portlet as necessary.

### To reschedule an inspection from the Inspections portlet

1. Navigate to the Inspections portlet.  
Civic Platform displays the Inspections list portlet.
2. Select the inspection you want to reschedule.
3. Hover your mouse over **Manage Inspection** to display a command menu, then select **Reschedule Inspections**.  
Civic Platform displays the Reschedule Inspections portlet.
4. Complete the fields in the Schedule Inspections portlet. For a list field descriptions, see [Inspection Scheduling and Results Fields](#).
5. Click **Submit**.  
Civic Platform confirms the rescheduled inspection.

## Cancelling an Inspection

Inspections need to be cancelled on occasion. For example, if a builder is waiting for materials to finish a job, or inclement weather delays the finish date of a project, an inspection should be cancelled and rescheduled as needed.



### Note:

If you cancel an inspection from a group that is not the default inspection group, the cancelled inspection does not affect the inspection workflow.

---

## Topics

- [Cancelling an Inspection from the Building Service or Request Portlet](#)
- [Cancelling an Inspection from the Inspections Portlet](#)

## Cancelling an Inspection from the Building Service or Request Portlet

1. Navigate to the Building or Service Request portlet as appropriate.
2. Use search to locate the record you want to work with. See [Using the Search Features](#) for more information about searching.  
Civic Platform displays a list of records.
3. Click the link in the Record ID column for the record you want to work with.  
Civic Platform displays the record details portlet.
4. Click the Inspections tab in the details portlet.  
Civic Platform displays a list of scheduled and completed inspections.
5. Select each inspection you want to cancel.
6. Hover your mouse cursor over the **Manage Inspection** button to display a command menu.
7. Select **Cancel Inspections**.  
Civic Platform displays the Cancel Inspections portlet.



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

Civic Platform confirms that the inspection is cancelled.

**Canceling an Inspection from the Inspections Portlet****1. Navigate to the Inspections portlet.**

Civic Platform displays the Inspections list portlet.

**2. Select the inspection(s) you want to cancel.****3. Hover your mouse cursor over the **Manage Inspection** button to display a command menu.****4. Select **Cancel Inspections**.**

Civic Platform displays the Cancel Inspections portlet.

**5. Click **Submit**.**

Civic Platform confirms that the inspection is cancelled.

**Transferring Inspections**

You can move inspections from one inspector's queue to other inspectors' queues as needed. You can implement a number of different scenarios using this functionality:

- You can transfer all of an individual's inspection assignments at one time to another individual.
- You can transfer all of an individual's inspection assignments at one time to multiple individuals using auto-assign.
- You can cancel all of an individual's inspection assignments at one time.
- You can transfer multiple inspection assignments (assigned to multiple individuals) at one time to one person.
- You can transfer multiple inspection assignments (assigned to multiple individuals) at one time to multiple individuals using auto-assign.
- You can cancel multiple inspection assignments (assigned to multiple individuals) at one time.

**Topics**

- [Transferring All of an Individual's Inspection Assignments](#)
- [Removing All of the Inspections from an Individual's Queue](#)
- [Transferring Inspections Assigned to Multiple Inspectors](#)
- [Unassigning Multiple Selected Inspections](#)

**Transferring All of an Individual's Inspection Assignments**

You can transfer all of an individual's inspection assignments at one time either to another individual, or to multiple individuals (using auto-assign functionality). When you transfer inspection assignments using auto-assign, Civic Platform checks the calendars of potential recipients and then makes assignments that do not conflict with existing assignments. Civic Platform then generates an alert that lists any inspection assignments that remain unassigned because of calendar conflicts. You can open the alert message and access the affected inspection records, and manually reassign the inspections.

**To transfer an individual's inspection assignments**

1. Access either the Inspections portlet or the Inspection tab on the record detail portlet, the Calendar portlet, or the My Tasks portlet, depending on which view you want.
2. Do one of the following:
  - To transfer inspections from a single individual to another individual:
    1. Do not select any inspection events.
    2. Hover your mouse cursor on the **Manage Inspections** button to display a command menu.
    3. Select **Transfer Inspections**.  
The Transfer form displays.

Inspections

Submit Cancel Help

Transfer all open inspections from Department \* Current Department Staff \* Current User  
 --Select Department-- --Select Staff--

To Department Current Department Staff Current User  
 --Select Department-- --Select Staff--

Auto Assigned to appropriate inspector

4. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
5. Use the bottom two fields to select the department and name of the individual you want to transfer inspection assignments to.
6. Click **Submit**.  
Civic Platform transfers all open inspections to the new individual. If there are any scheduling time conflicts, you can check the Alerts portlet for links to the inspections with conflicting times, and manually reschedule those inspections.
- To transfer inspections from a single individual to multiple individuals using auto-assign:
  1. Do not select any inspection events.
  2. Hover your mouse cursor on the **Manage Inspections** button to display a command menu.
  3. Select **Transfer Inspections**.  
The Transfer form displays.
  4. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
  5. Leave the bottom two fields blank.
  6. Select **Auto Assigned to appropriate inspector**.
  7. Click **Submit**.  
Civic Platform transfers all open inspections to new inspectors using auto-assign functionality. If Civic Platform encounters inspections that it cannot transfer due scheduling time conflicts, you can check the Alerts portlet for links to the inspections with conflicting times, and manually reschedule those inspections as needed.

## Removing All of the Inspections from an Individual's Queue

You can use the transfer form to quickly and easily clear all of the inspections in an individual's queue, moving them to the unassigned queue.

### To remove all of an individual's inspection assignments

1. Access either the Inspections portlet or the Inspection tab on the record detail portlet, the Calendar portlet, or the My Tasks portlet, depending on which view you want.
2. Hover your mouse cursor on the **Manage Inspections** button to display a command menu.
3. Select **Transfer Inspections**.  
The Transfer form displays.
4. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
5. Leave the bottom two fields blank.
6. Clear the **Auto Assigned to appropriate inspector** option.
7. Click **Submit**.  
Civic Platform displays a warning that you did not select a destination and that Civic Platform will change all assigned inspections for the named individual to an unassigned status.
8. Click **OK**.  
Civic Platform moves all of the selected inspectors to the unassigned queue.

## Transferring Inspections Assigned to Multiple Inspectors

You can transfer inspections assigned to multiple inspectors either to a single individual or to multiple inspectors using auto-assign functionality. You can only transfer scheduled inspections.

### To transfer inspections assigned to multiple inspectors

1. Access either the Inspections portlet or the Inspection tab on the record detail portlet, the Calendar portlet, or the My Tasks portlet, depending on which view you want.
2. From the list of inspections, select the inspections you want to transfer. You can only transfer scheduled inspections (Status = Scheduled) or resulted inspections that are not yet completed.
3. Hover your mouse cursor on the **Manage Inspections** button to display a command menu.
4. Select **Transfer Inspections**.  
The Transfer form displays.
5. Do one of the following:
  - Transfer the selected inspection events to a single individual.
    1. Choose the department, then the staff member to whom you want to transfer the inspection events.
    2. Click **Submit**.
  - Transfer the selected inspection events to multiple individuals using auto-assign.
    1. Leave the **Department** and **Staff** fields blank.

2. Select the **Auto Assigned to appropriate inspector** option.
3. Click **Submit**.

## Unassigning Multiple Selected Inspections

You can use the transfer form to quickly and easily move multiple selected inspections to the unassigned queue so that they can be reassigned.

### To unassign multiple inspections

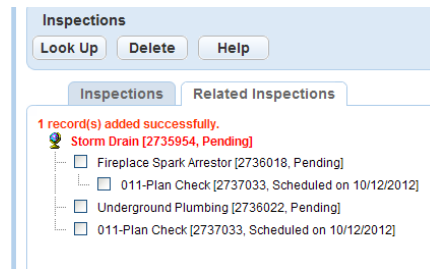
1. Access either the Inspections portlet or the Inspection tab on the record detail portlet, the Calendar portlet, or the My Tasks portlet, depending on which view you want.
2. From the list of inspections, select the inspections you want to unassign.
3. Hover your mouse cursor on the **Manage Inspections** button to display a command menu.
4. Select **Transfer Inspections**.  
The Transfer form displays.
5. Leave the two fields blank and clear the **Auto Assigned to appropriate inspector** option.
6. Click **Submit**.  
Civic Platform warns that you did not select a destination and that Civic Platform will change all assigned inspections for the named individual to an unassigned status.
7. Click **OK** to proceed.  
Civic Platform moves all of the selected inspections to the unassigned queue.

## Adding Related Inspections

You can add an inspection with one or more inspections. The Related Inspections tab provides a tree view of related inspections.

### To add related inspections

1. Navigate to the Inspection portlet.  
Civic Platform displays a list of inspections.
2. Click an inspection link.  
Civic Platform displays the inspection details portlet.
3. Click **Look Up**.
4. Complete the fields and click **Submit**.  
Civic Platform displays a list of related inspections.
5. Select the inspection you want to add.
6. Click **Select**.  
Civic Platform adds the related inspection to the tree view.



## Displaying an Inspection in ACA

You can define whether or not to display inspections in ACA from the Civic Platform console. This ability allows agencies to define specific types of inspections to display to or hide from public users by default, while still giving agency users the ability to apply show/hide setting to individual inspections. This section describes how to set an inspection to display in or hide from ACA.

### To set an inspection in Building portlet to display in or hide from ACA

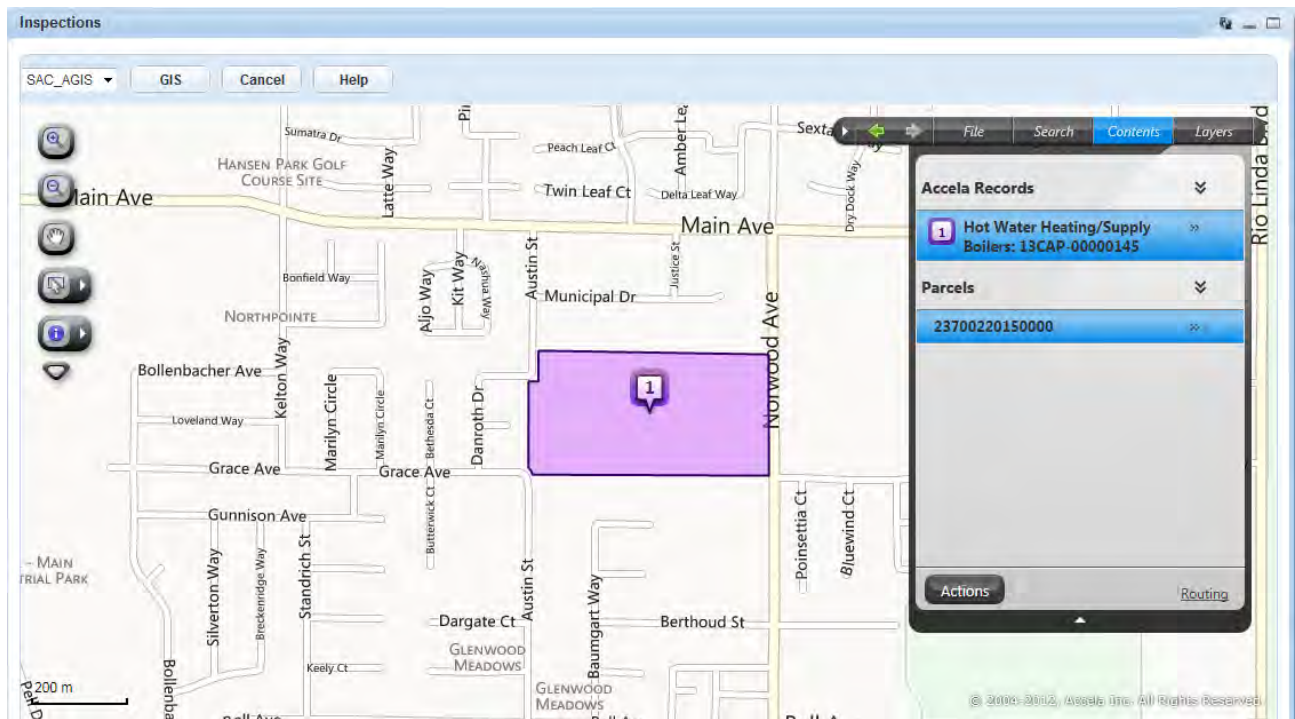
1. Navigate to the record list portlet
2. Use search to locate the record you want to work with. See [Using the Search Features](#) for more information about searching.  
Civic Platform displays a list of records.
3. Click the link in the Record ID column for the record you want to work with.  
Civic Platform displays the record details portlet.
4. Click the Inspections tab.  
Civic Platform displays the current list of inspections for the application.
5. Do one of the following:
  - If you have a Manage Inspection drop-down button in your toolbar, hover your mouse over **Manage Inspection** to display a command menu, then select **Display Inspections in ACA** or **Hide Inspections in ACA**.
  - If you do not have a **Manage Inspection** drop-down button in your toolbar, select the inspections you want, then click **Display in ACA** or **Hide in ACA**, depending on what you want to do.

## Working with Inspections in GIS

Accelea GIS can plot inspections on a map. With the map, you can do various jobs such as routing inspections.

### To plot an inspection on a map

1. Navigate to the Inspections portlet.
2. Select each inspection that you want to plot on a map.
3. Do one of the following:
  - Click **GIS**.  
Civic Platform launches the map viewer with a purple map marker that indicates the scheduled location of the inspection.



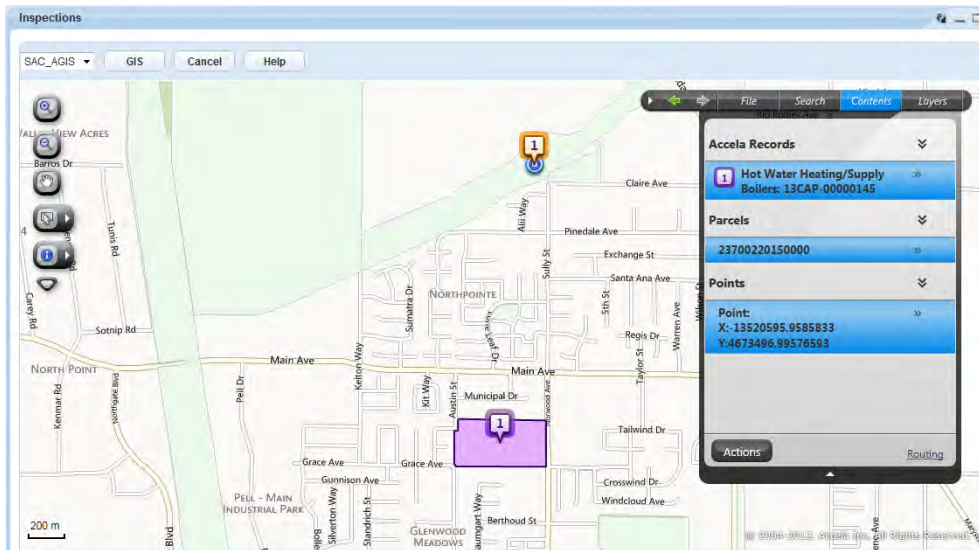
- Click **GIS** and select one of the following options:

- **Show Scheduled Location**

Civic Platform launches the map viewer and then displays a purple map marker that indicates the scheduled location of the inspection.

- **Show Scheduled and Submitted Locations**

Civic Platform launches the map viewer and then displays both the scheduled and inspected locations of the inspection with different map markers. The purple map marker indicates where the scheduled location is. The orange map marker indicates where the inspector submits the inspection.



## Managing Pending Inspections

Pending inspections can inform both an agency and an applicant about the inspections that need to occur before the agency can process an application. When you add a pending inspection to an application that belongs to an inspection flow or an inspection milestone process, Civic Platform displays an icon that indicates the status of the inspection.

If your agency uses inspection flow or inspection milestone functionality, you can only schedule pending inspections in sequence within the inspection flow or inspection milestone order. If you attempt to associate a pending inspection type with an application when the prior inspection in the inspection flow or inspection milestone process is unscheduled, Civic Platform disables the inspection type until you schedule the preceding inspection. Your agency administrator can configure Civic Platform so that supervisors can schedule any inspection at any time, regardless of its order within an inspection flow or inspection milestone process.

Accele Wireless and Citizen Access users can request inspections. For example, a public user without inspection scheduling privileges can set up a pending inspection. After he adds the pending inspection, agency users with inspection scheduling privileges receive a notification about the pending inspection, and they can schedule the inspection.

You can use the Pending Inspections portlet to add inspections that are outside of the default inspection group to an application, which enables you to add and schedule any necessary special circumstance inspections after an application's initial submission.



### Note:

You can schedule, reschedule, or cancel pending inspections. When you cancel an inspection, Civic Platform removes it from the application. You cannot result a pending inspection.

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## Topics

- [Requesting an Inspection from the Building Portlet](#)
- [Requesting an Inspection from the Inspections Portlet](#)

## Requesting an Inspection from the Building Portlet

You can create a pending inspection from the Building portlet as necessary.

### To create a pending inspection from the Record List Portlet

1. Navigate to the record list portlet (such as Building or Service Request) and use Search to locate the record you want to work with. See [Using the Search Features](#) for more information about searching. Civic Platform displays a list of records.
2. Click the link in the Record ID column for the record you want to work with. Civic Platform displays the record details portlet.
3. Click the Inspections tab. Civic Platform displays the current list of inspections for the application.
4. Move your mouse cursor over the **Manage Inspection** button to display a command menu.
5. Select **Schedule Inspection**. Civic Platform displays the Pending Inspections portlet.
6. Select the inspection group from which you want to add pending inspections from the Inspection Group drop-down list. Civic Platform displays the selected inspection group and associated inspection types in the Available Inspection Types box.

7. Click the inspection types you want to add as pending.  
Civic Platform highlights the selected inspections.
8. Click the right arrow to move the inspection types to the Selected Inspection Types box.  
Civic Platform displays the inspection types in the Pending Inspections list.
9. Click **Pending Inspections**.  
Civic Platform displays a confirmation message indicating that the inspection is pending.
10. Click **OK**.  
Civic Platform adds the inspections to the Inspections list portlet.

## Requesting an Inspection from the Inspections Portlet

You can create a pending inspection from the Inspections portlet as necessary.

### To create a pending inspection from the Inspections Portlet

1. Navigate to the Inspections portlet.  
Civic Platform displays the Inspections list portlet.
2. Hover your mouse cursor over **Manage Inspection** to display a command menu.
3. Select **Schedule Inspections**.  
Civic Platform displays the Pending Inspections portlet.
4. Select the inspection group from which you want to add pending inspections from the Inspection Group drop-down list.  
Civic Platform displays the selected inspection group and associated inspection types in the Available Inspection Types box.
5. Click the inspection types you want to add as pending.  
Civic Platform highlights the selected inspections.
6. Click the right arrow to move the inspection types to the Selected Inspection Types box.  
Civic Platform displays the inspection types in the Pending Inspections list.
7. Click **Pending Inspections**.  
Civic Platform displays a message confirming that the inspection is pending.
8. Click **OK**.  
Civic Platform adds the inspections to the Inspections list portlet.

## Copying an Inspection

You can copy an inspection from any existing record and attach it to the current record. To help you choose an appropriate inspection to copy, you can view a list of related checklists. You can copy any inspection that has a matching Inspection Group Code with the current record.



### Note:

To review a checklist and verify you are copying the correct inspection, click the checklist tab and the checklist you want to view. Return to the inspection list detail page by clicking the inspection detail tab.

Your agency administrator defines the security settings that dictate what your level of access is to checklists assigned to an inspection. For example, if an inspection is read-only, you can only view it. You cannot modify, delete, or copy checklists assigned to the inspection.

---



## To copy an inspection from the Inspection portlet

1. Navigate to the Inspection portlet and use search to locate the record you want to work with. Civic Platform displays a list of inspections.
2. Click the link in the Record ID column for the record you want to copy. Civic Platform displays the inspection details.
3. Click **Select Record to Copy from** in the Inspections portlet. Civic Platform displays the Record ID list.
4. Search for and select the record you want to copy the inspection from.
5. Click **Submit**  
Civic Platform copies the inspection.



### Note:

If the inspection status is Scheduled, you can edit the Schedule comment. If the inspection status is a result, you can edit both the Schedule and the Result comment.

---

6. When you finish editing the copied inspection, click **Submit**.  
Civic Platform copies the inspection with all its associated checklists to the Record you opened at the beginning of the task.

## Editing a Default Inspection

Civic Platform adds default inspections automatically when you create a new application or a new service request. Your agency defines which inspections that Civic Platform adds by default. For example, your agency may require that all new building applications have electrical, plumbing, and framing inspections or that all new service request applications have investigation, progress, and completion inspections.

You can edit a default inspection. However, you may only change whether a default inspection is optional or required.

## Assigning an Inspection

Agencies can assign inspections to inspectors either manually or automatically. There are several methods to choose from when assigning inspections. For example, the inspector with the lightest workload might receive the first inspection assignments, or an agency might schedule an inspection based on the requirements of the inspection type.

Inspections may be assigned automatically to inspectors following the auto assign configuration by the agency administrators. Automatic assignment searches available inspectors by disciplines first, then by districts, then by inspector workload or availability.



### Note:

Civic Platform follows the following priorities to get the district of an application: (1) The inspection district setting of the application parcel; (2) The inspection district setting of the application address; (3) The inspection district that the application parcel belongs to in the GIS map. A parcel may overlay multiple GIS inspection districts. Your agency administrator may have configured to get the inspection district by the major portion of the parcel maps to. Or, a dialog box prompts you to select the inspection district.

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Civic Platform allows you to assign and re-assign inspections from both the Inspections and Building modules. The topics below describe how to assign inspections from both.

### Topics

- [Assigning an Inspection from the Inspection Portlet](#)

- [Assigning an Inspection Automatically from the Inspections Portlet](#)
- [Reassigning an Inspection Automatically from the Inspections Portlet](#)
- [Assigning an Inspection Automatically from the Service Request or Building Portlet](#)
- [Automatically Scheduling by District](#)
- [Automatically Scheduling by Districts, Disciplines, Calendar, and Workload](#)

## Assigning an Inspection from the Inspection Portlet

1. Go to the **Inspection** portlet. If you are using default settings, this appears on the Inspections main link. Civic Platform displays a list of inspections.
2. Select the scheduled inspection(s) you want to assign. If a record has more than one inspection associated with it, you can schedule multiple inspections for that record at the same time.
3. Hover your mouse cursor over the Menu button to display a command menu.
4. Select **Assign Inspector**.  
Civic Platform displays the Assign Inspection detail form portlet.
5. Select the department from the **Assign to Department** drop-down list.
6. Select the staff member from the **Assign to Staff** drop-down list.  
If you click the **Current User** link, your user name goes in the Assign to Staff field, and the associated department field updates to reflect your department.
7. Click **Submit**.  
Civic Platform assigns the inspection and displays the inspection list.

## Assigning an Inspection Automatically from the Inspections Portlet

Inspections may be set up by the agency administrator so they are scheduled automatically when a new application is created. When prompted to automatically schedule inspections, a schedule is identified which will be used to assign the appropriate inspector and schedule the appropriate date and time to the inspection.

The parameters used in determining the automatic inspection assignment are built into Civic Platform in order to effectively determine automated inspection assignments. Automatic assignment is predetermined to search by disciplines first, then by districts, then by inspector workload or availability.

### To assign an inspection automatically from the Inspections portlet

1. Navigate to the Inspection portlet.  
Civic Platform displays a list of inspections.
2. Click **New**.
3. In the Record ID column, click the link for the record you want.  
Civic Platform displays the record details.
4. Click **Auto Assign**.
5. Complete the following fields.

**Date**

Select the date of the inspection.

<b>Requester Phone Number</b>	Enter the phone number for the person who requested the inspection.
<b>Auto Assign</b>	Civic Platform automatically assigns an inspector.

**6. Click **Submit**.**

Civic Platform automatically assigns the inspection to an inspector.

## Reassigning an Inspection Automatically from the Inspections Portlet

**1. Navigate to the **Inspection** portlet and use search to locate the record you want to work with (See [Using the Search Features](#) for more information).**

Civic Platform displays a list of inspections.

**2. Select the record you want by clicking the record ID link.**

Civic Platform displays the record details.

**3. In the Auto Assign column, click the link for the inspection you want to reassign.**

Civic Platform displays the inspection details for the inspection that you chose.

**4. Complete the fields.**

<b>Date</b>	Select the date of the inspection.
<b>Requester Phone Number</b>	Enter the phone number for the person who requested the inspection.
<b>Auto Assign</b>	Civic Platform automatically assigns an inspector.

**5. Click **Submit**.**

Civic Platform automatically assigns the inspection to the qualified inspector with the lightest workload.

## Assigning an Inspection Automatically from the Service Request or Building Portlet

**1. Open the Building or Service Request record you want to work with and locate the application you want to work with by clicking the record ID link in the Record ID column.**

Civic Platform displays the record details.

**2. Click the Inspections tab.**

Civic Platform displays a list of scheduled and completed inspections for the record.

**3. Click **New**.**

Civic Platform displays a list of inspections required for the record.

**4. Click **Auto Assign**.**

Civic Platform displays the new inspection details.

**5. Complete the available fields.**

<b>Date</b>	Select the date of the inspection.
<b>Requester Phone Number</b>	Enter the phone number for the person who requested the inspection.
<b>Auto Assign</b>	Civic Platform automatically assigns an inspector.

**6. Click **Submit**.**

Civic Platform automatically assigns the inspection to the qualified inspector with the lightest workload.

## Reassigning an Inspection Automatically from the Building or Service Request portlet

1. Open the Building or Service Request portlet and locate the record you want to work with.
2. Click the record ID link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. In the Auto Assign column, click the link of the inspection you want to reassign.  
Civic Platform displays the inspection details of the inspection that you chose.
4. Complete the available fields.

<b>Date</b>	Select the date of the inspection.
<b>Requester Phone Number</b>	Enter the phone number for the person who requested the inspection.
<b>Auto Assign</b>	Civic Platform automatically assigns an inspector.

5. Click **Submit**.  
Civic Platform displays the new inspection details.

## Automatically Scheduling by District

Agencies covering large geographic areas (districts) often establish and assign regions to their inspectors. The agencies use application addresses and parcel addresses to determine the available districts, and then use this information as criteria to determine a list of valid inspectors for the inspection.

You must associate districts with both inspections and inspectors to automatically schedule inspections. You can manually assign the districts to inspections. You can also assign districts by selecting areas in Accela GIS. See your agency administrator for information on how to associate districts with inspections using Accela GIS and on how to set up an inspector profile.

### To automatically schedule an inspection by district

1. Go to the Inspection portlet.  
Civic Platform displays the Assign Inspection screen.
2. From the list of Inspections, select the **Assign by District** link next to the inspection you want to work with.  
Civic Platform displays the Address and Parcels with districts.
3. Click **Select** next to the address or parcel you want.  
Civic Platform displays a list of valid inspectors within the district selected.
4. Click **Select** next to the inspector you want.  
Civic Platform assigns the inspector to the inspection.

## Automatically Scheduling by Districts, Disciplines, Calendar, and Workload

There are four factors that you need to take into account for automatic inspection scheduling:

- Geographic area (also known as a district).
- Discipline.
- Calendar availability.
- Workload availability.

You can schedule Inspections by parcel, discipline, and the date and time of required completion of the inspection. You can also assign an inspector at this time, or your agency can configure Civic Platform to automatically assign an inspector based on entered parameters.

If you schedule an inspection for the wrong date/time, you can reschedule it or cancel it as needed.



**Note:**

If a user has supervisory privileges, he can schedule inspections that exceed the maximum number of inspections per day. He can also schedule inspections on holidays or weekends.

---

### To automatically schedule an inspector to an inspection

1. Go to the Inspection portlet.  
Civic Platform displays the Inspection Scheduling—Inspection List screen.
2. From the list of Inspections, select the **Auto Assign** link next to the inspection you want to work with.  
Civic Platform displays the Inspection Scheduling—Schedule window.
3. Complete the fields with available data. See [Inspection Scheduling and Results Fields](#) for field definitions.



**Note:**

As you enter data, Civic Platform filters the list of available inspectors for assignment to match the entered data.

When you select an inspector, the Department field automatically populates with the selected inspector's department.

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4. Click **Auto Assign**.  
Civic Platform displays a list of valid inspectors for the criteria.
5. Click **Select** next to the inspector you want.  
Civic Platform returns to the Inspection Scheduling - Schedule portlet and automatically populates the department name and inspector name.
6. Click **Submit**.

## Entering Inspection Results

After completing an inspection, inspectors can enter inspection details and inspection results either directly and/or by filling in the checklist item results. If an inspector conducts a series of inspections simultaneously, he has the ability to quickly update the inspection status and results for all of the inspections in one action.

Inspectors can enter inspection results at any time, regardless of an inspection's status. For example, a public user without inspection scheduling privileges requests a mechanical inspection for a building application. Civic Platform assigns a status of Pending to the inspection. However, before the agency officially schedules the inspection, an inspector completes the inspection. He can still enter his results, even though the status is Pending.

Upon entering inspection details, Civic Platform updates inspector workloads accordingly. For example, Amy, a building inspector, has eight inspection units per day. On Monday, Amy's schedule has her conducting an electrical inspection at 3pm (utilizing one inspection unit). However, Amy completes the inspection at 10am instead, and enters the inspection results. Civic Platform updates her daily workload from eight units to seven units. Amy's supervisor can then assign another inspection to Amy at 3pm.



**Note:**

Supervisors can modify any result field that an inspector populates.

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## Topics

- [Entering Results for Inspections](#)
- [Editing an Inspection Result](#)
- [Following Up an Inspection](#)

## Entering Results for Inspections

After completing an inspection, you can update the inspection details. You may enter results for multiple inspections. However, some inspections may have specific information that differs from others. Such inspections are not updated. Civic Platform provides a summary listing which inspections were not updated, along with the reasons why not.

### To enter inspection results for inspections

1. Open the Inspection list portlet either via the main link or via the Inspections tab of a record.
2. Select the inspection for which you want to enter a particular result.
3. Complete the checklist. See [Completing a Checklist](#) for more information.
4. Access the Result Inspections portlet in one of two ways:
  - Hover your mouse over **Manage Inspection** to display a command menu, then select **Result Inspections**.
  - Hover your mouse **Menu** to display a command menu, then select **Result**. Civic Platform displays the Result Inspections portlet.
5. Update the available fields.



#### Note:

(1) Values entered in the Inspection Date and Inspection Time fields auto-populate the Result Date and Result Time fields.

(2) If you have no supervisory privileges, the Inspection Score, Inspection Result, and Inspection Grade fields may be read-only.

---

For field definitions, see [Inspection Scheduling and Results Fields](#).

6. Click **Submit**.

Civic Platform displays a summary of the updated inspections, skipped inspections, and failed updates. The inspection list reflects the changes to the inspections.

## Editing an Inspection Result

Civic Platform provides the ability for a supervisor to modify an inspection after it has been resulted.

### To enter inspection results

1. Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
2. Select the inspection you want to work with.
3. Access the Result Inspections portlet in one of two ways:

- Hover your mouse over **Manage Inspection** to display a command menu, then select **Result Inspections**.
  - Hover your mouse over **Menu** to display a command menu, then select **Result**. Civic Platform displays the Result Inspections portlet.
4. Update the available fields. See [Inspection Scheduling and Results Fields](#) for field definitions.
  5. Click **Submit**.

## Following Up an Inspection

Some agencies elect to configure some inspection types to require follow-up inspections.

### To follow up an inspection

1. Navigate to the Inspection portlet.  
Civic Platform displays a list of inspections.
2. Select the inspection that you want to work with.
3. Hover your mouse over **Menu** to display a command menu, then select **Result**.
4. Complete the **Status** and the **Schedule Date** fields.
5. Click **Save**.  
Civic Platform displays the follow-up inspections.
6. Select the follow-up inspection and click **Submit**.  
Civic Platform adds the follow-up inspection.

## Working with Checklists and Route Sheets

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Checklists and route sheets are tools designed to help inspectors complete inspections. A checklist may be a checklist, a questionnaire, or an outline of the steps involved in a particular type of inspection. A route sheet is comparable to a day planner, as it lets an inspector organize all of the inspections for which he or she is currently responsible.

### Topics

- [About Checklist Items](#)
- [Adding a Checklist to an Inspection](#)
- [Copying a Checklist to an Inspection](#)
- [Adding Checklist Items to a Checklist](#)
- [Completing a Checklist](#)
- [Managing Attachments Associated with a Checklist Item](#)
- [Removing a Checklist from an Inspection](#)
- [Organizing a Route Sheet](#)
- [Accessing a Checklist from a Route Sheet](#)
- [Accessing a Checklist Item from the Inspection Documents Portlet](#)

### About Checklist Items

A checklist contains a number of checklist items for inspectors to use. When inspectors work with a checklist during an inspection, they set a status for each checklist item on the list. The scores of all the checklist items automatically populate, and some checklist items may be automatically checked as “major violation.” The total score and number of major violations determine the inspection result, including inspection status and inspection grade.

Some agencies set certain checklists and checklist items as required. Required checklists with required checklist items must be completed. However, if a required checklist does not have any required checklist items, you can skip the checklist. If a checklist is not required, checklist items may not be required either.

### Adding a Checklist to an Inspection

Your agency may configure a checklist for each type of inspection your agency does. If your agency has not defined a checklist for an inspection type you are working on, you can add one from a list of reference checklists. You can also copy checklists from a one inspection type to another.

#### To add a checklist to an inspection

1. Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
2. Click the link for the inspection that you want to update.  
Civic Platform displays the inspection details.
3. Click the Checklists tab.
4. Click **Search**.



5. From the **Group** drop-down list, choose the group that includes the checklist you want to add to the inspection.  
Civic Platform displays a list of Reference Checklists attached to the selected Checklist group.
6. Select the checklist(s) you want to add. To select all reference checklists, select the box at the top of the list.  
You can also enter a Checklist ID. The Checklist ID displays on the checklist detail page when you enter the inspection results.
7. Click **Submit**.  
Civic Platform updates the checklist list.

## Copying a Checklist to an Inspection

You can copy a checklist from one inspection and apply it to another. If an inspection already has a checklist associated with it and you copy the same checklist over to the inspection, Civic Platform will overwrite the original checklist with the copied version.



### Note:

Access to a checklist is assigned to an inspection based on the specific inspection security settings by your agency administrator. For example, if an inspection is read-only, you can only view it. You cannot modify, delete, or copy checklists assigned to the inspection.

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### To copy a checklist to an inspection

1. Locate and open the application to which you want to apply the inspection information.  
Civic Platform displays the Application Summary page.
2. Navigate to Inspection tab.  
Civic Platform displays the Inspection Type list.
3. Click the inspection type name you want to view.  
Civic Platform displays Inspection details.
4. Click the Checklist tab.  
Civic Platform displays the Inspection Checklist page.
5. Hover your mouse on **Menu** to display a command menu, then click **Copy**.  
Civic Platform displays the Look up Checklists.
6. Search for and select the record with the checklist(s) you want to copy over.
  - Select the record you want and click **Submit**.  
Civic Platform displays the inspection list and checklists from the record.
7. Select the checklists you want to copy.
8. Click **Submit**.  
Civic Platform returns to the original inspection type and then displays all checklists.

## Adding Checklist Items to a Checklist

When a checklist does not contain a checklist item that you want, you can add a checklist item from any existing reference checklist.

### To add a checklist item to a checklist

1. Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
2. Click the link for the inspection that you want to update.  
Civic Platform displays the inspection details.
3. Click the Checklist tab.  
Civic Platform displays the checklist currently associated with the inspection.
4. Click the link for the checklist you want to work with.  
Civic Platform displays a list of checklist items.
5. Click the **Add** link next to the Checklist Items heading in the list.  
The checklist item selection window displays.

6. Locate the desired checklist item.  
If known, choose the Checklist Group and Checklist that contains the checklist item from the drop-down lists, or enter the checklist item key word and click the search icon.
7. Select the desired checklist item, and click **Select**.  
Civic Platform adds the checklist item into the checklist.
8. If necessary, you can click the **Delete** link next to the checklist item that you newly added to remove the item from the checklist. Note that you cannot remove a checklist item that your agency administrator configured in the checklist.

## Completing a Checklist

Completion of a checklist enables inspectors to keep a record of detailed inspection results, and may also serve as a checklist during an inspection.

Unless you have supervisor permission, you must complete all the required checklists in an inspection before you set an inspection status to Approved. However, if you set the inspection status to Pending or Denied, there is no validation that required checklists have been completed.

### To complete a checklist

1. Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
2. Click the link for the inspection that you want to update.  
Civic Platform displays the inspection details.
3. Click the Checklists tab.  
Civic Platform displays the checklists currently associated with the inspection.

- Click the link for the checklist you want to complete.

Civic Platform displays a list of checklist items.

- For each checklist item, select a status. All required items must be completed.

When you select an item status, the item score auto-populates with a pre-defined value for the status. You can also enter the item score manually.

The total score and the number of major violations for the checklist automatically updates when you change the status and score of a checklist item.



**Note:**

(1) If you have no supervisory privileges, your agency administrator may only allow you to modify the checklist item statuses, and forbid you from editing inspection result, inspection grade, checklist total score, and checklist major violation.

(2) You can click the History link in the History column of a checklist or checklist item, to view the history results of the checklist or the checklist item.

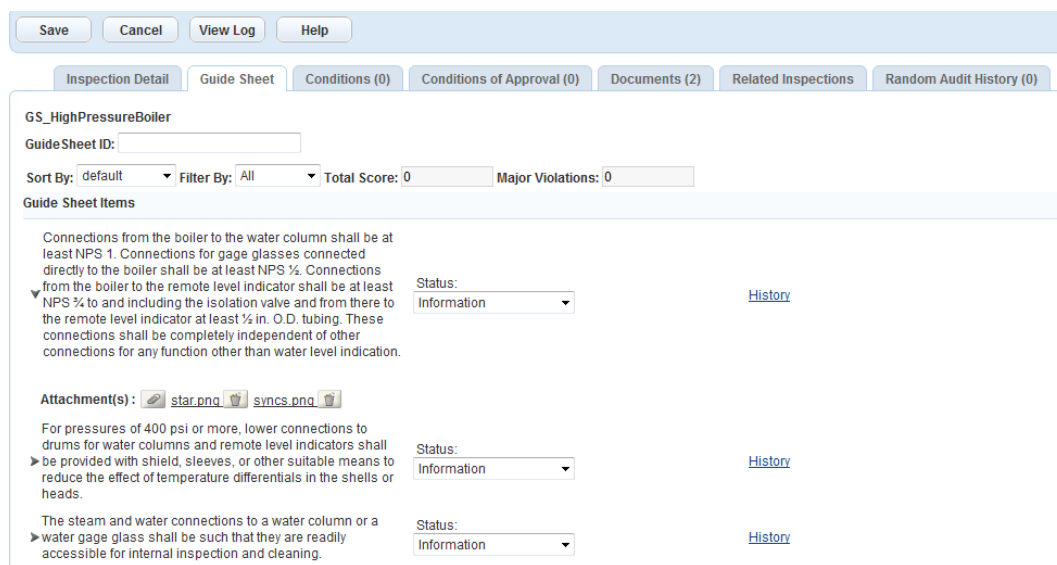
- Click **Submit**.

## Managing Attachments Associated with a Checklist Item

You can associate attachments to checklist items and manage those attachments as needed.

### To manage attachments associated with a checklist item

- Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
- Click the link for the inspection that you want to update. Civic Platform displays the inspection details.
- Click the Checklist tab. Civic Platform displays the checklists for the inspection.
- Click the link for the checklist you want to complete. Civic Platform displays a list of checklist items.



- Expand the desired checklist item, then do one of the following.

- To associate documents or image files with the checklist item, click the Upload File icon. For instructions, see [Attachments](#) . Civic Platform lists attachments under the checklist item. Checklist item attachments are also accessible via the Attachments tab for the inspection that the checklist item belongs to.
- To open or download an existing attachment, click the link to the attachment name.
- To remove an attachment, click the Delete icon next to the desired attachment.

## Removing a Checklist from an Inspection

If you add the wrong type of checklist to an inspection, you can remove it. Be careful not to delete completed checklists as you may lose inspection details recorded on the checklist.

### To remove a checklist

1. Locate the inspection you are working on, either via the Inspections main link or via the Inspections tab for the record you are working with.
2. Click the link for the inspection that you want to remove. Civic Platform displays the inspection details.
3. Click the Checklists tab.
4. Select the checklist that you want to remove.
5. Click **Delete**. Civic Platform updates the checklist list.

## Organizing a Route Sheet

A route sheet helps inspectors organize inspections by minimizing the time and distance that they travel. Contact your agency administrator to enable this feature.

### To organize a route sheet

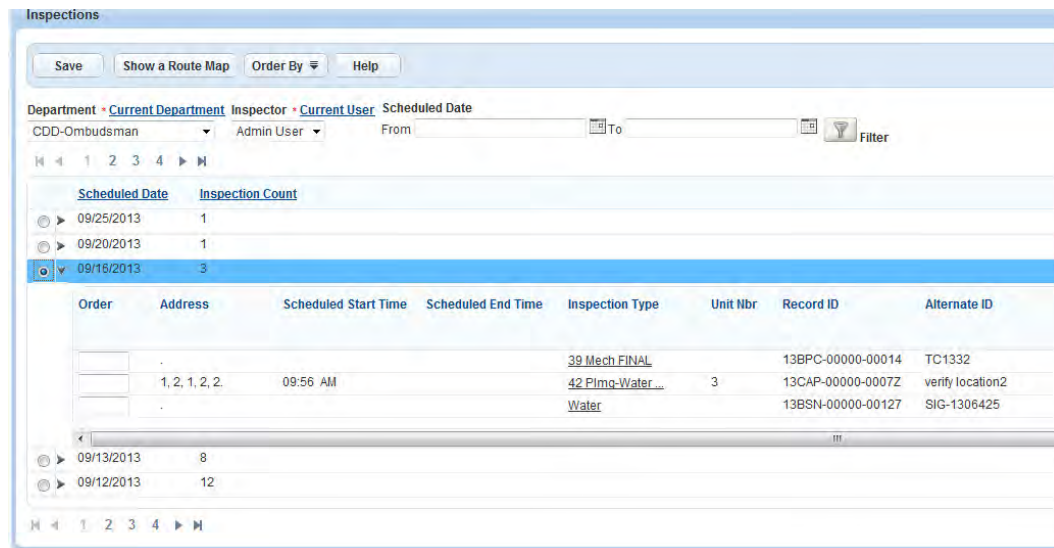
1. Navigate to the Inspections portlet. Civic Platform displays a list of inspections.
2. Click **Route Sheet**. Civic Platform displays the Inspection Route Sheet page.

The screenshot shows the 'Inspections' portlet interface. At the top, there are buttons for 'Save', 'Show a Route Map', 'Order By', 'Cancel', and 'Help'. Below these are filter fields: 'Department' with a dropdown menu showing 'Current Department' and 'Accela Admin', 'Inspector' with a dropdown menu showing 'Current User' and 'ADMIN ADMIN', and 'Scheduled Date' with 'From' and 'To' input fields. A 'Filter' button is located to the right of the date fields. Below the filters, there is a table header with columns for 'Scheduled Date' and 'Inspection Count'. At the bottom, it indicates '0 record(s) found.'

3. Select the relevant department from the **Department** drop-down list. Civic Platform populates the Inspector drop-down list based on the department selection.
4. Select an inspector from the **Inspector** drop-down list. Click **Current User** to populate the field with your user name.
5. Define the date range for the scheduled inspections in the **From** and **To** fields.

## 6. Click **Filter**.

Civic Platform filters the inspection list.



## 7. Select the date for which you want to route inspections.

Civic Platform displays the inspection list.

## 8. Optimize your inspection route. You can use GIS, or you can use a third party optimizer, provided your agency has configured the integration for it.

- To use Accela Silverlight GIS:

1. Review the inspection list and update inspection details. For field definitions, see [Inspection Route Sheet Fields](#).

2. Enter a value in the **Order** field to determine the inspection order, if needed.

3. Click **Show Route Map**. Re-route the inspection list using Accela Silverlight GIS functions.

Accela Silverlight GIS displays the inspection route based on the order of the inspections:

If inspections are in numerical order, Accela Silverlight GIS displays the inspection route in assigned order. If some but not all inspections are in numerical order, Accela Silverlight GIS displays the inspection route in the assigned order. Inspections without an assigned numerical order display as individual markers. If none of the inspections are in numerical order, Accela Silverlight GIS optimizes the inspection route by distance and displays the route.

4. Use the Accela Silverlight GIS Actions menu to route the inspection.

For example, use the **Optimized by Distance** map command to route inspections for minimal travel distance. Use the **Optimized by Time** map command to route inspections for minimal travel time.

5. Use the **Send Items Order** map command to send the route list to Civic Platform.

Civic Platform updates the route list.

- To use a third-party optimizer:



### Note:

To use this feature, your agency must integrate a third-party route optimizer with Civic Platform. Contact your agency administrator for help.

1. Click **Order By**, then select an option from the drop-down menu. Options include Public Transit, Walking, Driving, and Show Locations on Map.  
If you select Show Locations on Map, Civic Platform launches the map viewer and plots the inspections on the map.

9. Click **Save**.

Civic Platform saves the route list.

## Accessing a Checklist from a Route Sheet

While you are viewing the individual inspections for a particular application, you may want to view the checklist associated with a particular inspection on the route sheet.

### To access a checklist from a route sheet

1. Access the Classic Administration Portlet. See "Accessing the Classic Administration Portlet" in *Accela Civic Platform Administrator Guide*.
2. Click Daily tab.
3. Go to the **Inspection** portlet. If you are using default settings, this appears on the Inspections main link. Civic Platform displays a list of inspections.
4. Click the **Route Sheet** link.  
Civic Platform displays the Inspection Route Sheet page.

Inspection Route Sheet

Department Administrator

Accela Administrator

Show All

From: 03/20/2013 Date To: 03/26/2013 Date

Search Inspection

Schedule Date: 02/27/2012 View Map

Order	Location	Time	Inspection Type	Unit Nbr	Application #
	2633 Camino Ramon, San Ramon, CA 94583		<a href="#">License Inspection</a>		BUS-000026

Guide Sheet  
 Result  
 History  
 View Log

Submit

5. Click the red dot for the inspection you want.

Civic Platform displays the Inspection Checklist Summary screen.

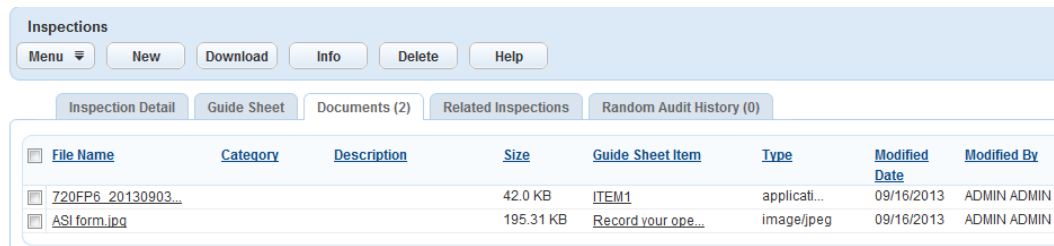
## Accessing a Checklist Item from the Inspection Documents Portlet

You can access a checklist item from the Documents tab on an inspection record.

### To access a checklist item from the Inspection Documents portlet

1. Find the inspection you are working on with one of the following approaches:
  - Go to the record open the application. In the **Inspections** tab, click the link to the inspection you want.
  - Go to the **Inspection** portlet. In the **Inspection Type** column, click the link to the inspection you want.
2. Click the Documents tab.

Civic Platform displays the attachments associated with the inspection and the attachments associated with the checklist items of the inspection.

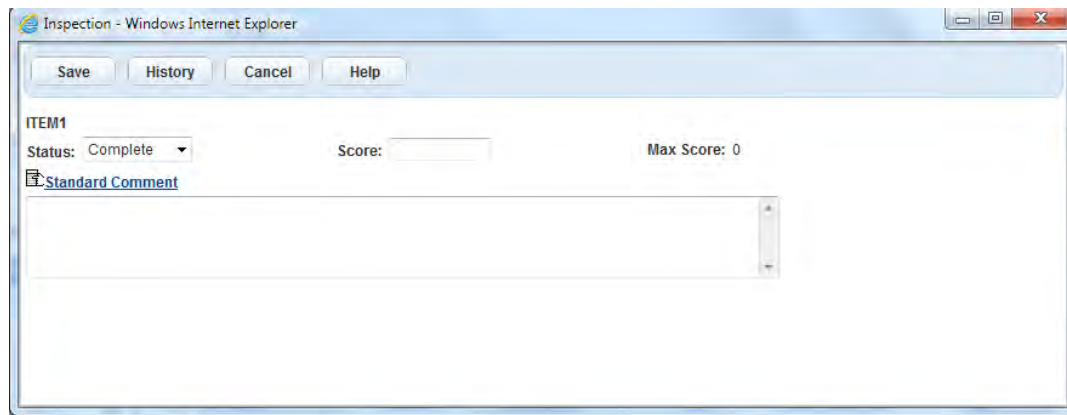


The screenshot shows the 'Inspections' interface with a table of attachments. The table has columns for File Name, Category, Description, Size, Guide Sheet Item, Type, Modified Date, and Modified By. Two rows are visible:

<input type="checkbox"/>	File Name	Category	Description	Size	Guide Sheet Item	Type	Modified Date	Modified By
<input type="checkbox"/>	720FP6_20130903...			42.0 KB	ITEM1	applicati...	09/16/2013	ADMIN ADMIN
<input type="checkbox"/>	ASI form.jpg			195.31 KB	Record your ope...	image/jpeg	09/16/2013	ADMIN ADMIN

3. Click the link to the desired checklist item.

Civic Platform displays the details about the checklist item.



The screenshot shows a web browser window titled 'Inspection - Windows Internet Explorer'. The page displays details for a checklist item named 'ITEM1'. The status is 'Complete', the score is empty, and the max score is 0. There is a 'Standard Comment' section with a text area.

ITEM1  
 Status: Complete  
 Score:   
 Max Score: 0  
 Standard Comment

4. Update fields as needed.
5. Click **History** to view a history actions for the checklist item.

## Working with Inspection Conditions

You can apply conditions (such as Hold, Lock, or Notice) to inspections as needed. Civic Platform automatically applies any condition assigned to an Inspection Group and/or Type to a scheduled inspection.

An inspection condition can impact a checklist, determining whether users can edit the checklist or not.

You can view the conditions associated with an inspection on the Conditions tab. Conditions applied to an inspection also display in the Condition status bar in the inspection portlet. Condition Status Bar



### Topics

- [Applying a Condition from the Conditions Tab](#)
- [Changing the Display Order of Conditions](#)
- [Deleting a Condition](#)

### Applying a Condition from the Conditions Tab

You can apply a new condition to an inspection from the Conditions tab on an inspection record.

#### To apply a condition from the Conditions tab

1. Navigate to the Inspections portlet  
Civic Platform displays inspection details
2. Click the Conditions tab.  
Civic Platform displays any conditions associated with the inspection.
3. Complete the fields as described in [Conditions Form Fields](#).
4. Click **Submit**.  
Civic Platform applies the custom condition and then displays the condition for the inspection.

### Changing the Display Order of Conditions

Organize the display order of multiple conditions associated with an inspection.

#### To change the display order of a condition

1. Navigate to the Inspections portlet  
Civic Platform displays inspection details
2. Click the Conditions tab.  
Civic Platform displays any conditions associated with the inspection.



3. Enter a number to indicate the placement in the Display Order box for each condition. For example, to display a condition at the top of the list, enter 1.
4. Click **Reorder**.  
Civic Platform applies the new display order, with the objects listed in numerical order.

## Deleting a Condition

If you applied a condition by mistake or if a condition is no longer applicable, you can delete it. When you delete a condition, Civic Platform does not completely remove it. Instead, the condition display order field is deactivated so it does not display.

### To delete a condition from an inspection

1. Navigate to the Inspections portlet  
Civic Platform displays inspection details
2. Click the Conditions tab.  
Civic Platform displays a list of conditions associated with the inspection.
3. Select the condition you want to remove.
4. Click **Delete**.  
Civic Platform deactivates the Display Order field.

## Attaching Documents to an Inspection

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Users can attach documents and images to an inspection. For example, during the course of a fire inspection, the inspector takes a photograph of broken fire equipment. The inspector can then upload the photograph into the inspection record.

Users can attach inspection documents to inspections any time after scheduling in Civic Platform -- even after the inspector submits the results. These documents display in all relevant portlets where you can view inspection details, including the Building and Calendar portlets. When viewed in the permit application portlet, Civic Platform automatically sorts inspection documents and then lists them below the general attached documents for the record.

For information about uploading and accessing documents, see [Attachments](#) .

## Examining Inspection (and Related) Details

The following tables list and define the default fields available in the different interfaces you might encounter.



### Inspection Scheduling and Results Fields

The table below lists and defines fields that may be available as you work with Inspection Scheduling and Results.

Table 40: Inspection Scheduling and Results Detail

<b>ACA Role</b>	Specify which users have access to view Inspection Comments. Select one or more of the following options: All Citizen Access Users, Record Creator, Licensed Professional, Owner, and/or Contact.
<b>Address</b>	Enter the inspection address.
<b>Comment Display in ACA</b>	Select to activate the display of inspection comments in Citizen Access. Define who can view the comments in the Citizen Access Role field.
<b>Department</b>	Use the drop-down list to choose the department responsible for completing the inspection. You can change the assignment as needed when rescheduling an inspection. See <a href="#">Rescheduling an Inspection</a> .
<b>Display Comment in ACA</b>	Applies only to Citizen Access users. Specify if Citizen Access users can view the inspection results comments. To hide all comments from all Citizen Access users, clear this option.
<b>Display in ACA</b>	Select to display the inspection in Citizen Access.
<b>Document Name</b>	Enter the title of the document you are attaching to the inspection.
<b>EDMS Name</b>	Select the Electronic Document Management System from the drop-down menu. This field relates to attaching documents to an inspection. For more information, see <a href="#">Attaching Documents to an Inspection</a> .
<b>End Mileage</b>	Enter the reading from the odometer that displays in the vehicle after you complete the inspection.
<b>End Time</b>	Enter the time when you finished the inspection.
<b>File Name</b>	Enter the fully qualified path or click <b>Browse</b> to locate the file on your computer. The document size may be up to 16MB.
<b>Inspection Contact Name</b>	Enter the first, middle, and last name of the person who requests the inspection. You can either enter the name manually or use the data picker beside this field to find a contact.
<b>Inspection Contact Phone Number</b>	Enter the phone number of the person who requests the inspection.
<b>Inspection Date</b>	Use the calendar icon to choose the date when you complete the inspection.
<b>Inspection Grade</b>	The grade of the inspection result. The status is auto-filled based on the checklist results and the settings by your agency administrator. Supervisors may have the privileges to manually override the inspection grade.  A grade may display for the grade depending on the settings by your agency administrator.
<b>Inspection Score</b>	The score of the inspection.  The inspection score is auto-calculated based on the checklist total scores and the settings by your agency administrator. Supervisors may have the privileges to manually override the inspection score.

<b>Inspection Sequence Number</b>	<p>The sequence number automatically assigned when Civic Platform creates an inspection.</p> <p>Sequence numbers are unique and incremental. Inspection reports can display the inspections in the order that they occur.</p>
<b>Inspection Time</b>	Displays the current time. Use the drop-down lists to choose a different time and indicate whether the time is AM or PM.
<b>Inspection Type</b>	The type of inspection selected for scheduling.
<b>Inspector</b>	<p>Use the drop-down list to choose the inspector within the department responsible for completing the inspection.</p> <p>If you are responsible for opening the inspection, click the <b>Current User</b> link to enter your user name into the field. When you click the Current User link, the associated department field updates to reflect the correct department for the current user. You can change the assignment as needed when you reschedule an inspection. See <a href="#">Rescheduling an Inspection</a>.</p>
<b>Latitude</b>	When using a GPS device, enter the latitudinal coordinates.
<b>Longitude</b>	When using a GPS device, enter the longitudinal coordinates.
<b>Record Comment</b>	<p>Displays the comments that have the Apply to Inspections check box selected in the Comments tab of the associated record.</p> <p>If you can edit comments in the record comment tab, you can click the Edit link besides this field to edit the record comment, which directly updates the original comment in the record comment tab. If you can delete comments in the record comment tab, you can click the Remove link next this field to remove a comment.</p>
<b>Record ID</b>	<p>The unique identification number of the record ID requiring this inspection.</p> <p>If you click the link at a Record ID, a window pops up displaying the details for the record.</p>
<b>Record Type</b>	Choose the type of record that requires an inspection.
<b>Request Comment</b>	Enter comments about the new inspection. You may identify who requested the inspection, or any other important details.
<b>Request Date</b>	Date when Civic Platform automatically schedules and submits a new inspection.
<b>Requestor</b>	Enter the first, middle, and last name of the person who processes the inspection request or who schedules the inspection, if other than the current user. The current user's log in name populates automatically. If a user schedules the inspection using Citizen Access or IVR, the user's name automatically populates in this field.
<b>Requestor Phone Number</b>	Enter the phone number for the person who processes the inspection request or who schedules the inspection. If a user schedules the inspection using Citizen Access or IVR, the user's phone number automatically populates in this field.
<b>Request Time</b>	Civic Platform automatically generates a value for this field when a user schedules and submits a new inspection.
<b>Required/Optional</b>	Use the drop-down list to set the inspection as required or optional.
<b>Result Comment</b>	Enter inspection result comments. You can also click the Selection icon to choose from a list of standard comments.
<b>Scheduled Date</b>	<p>The date when a user schedules the inspection. When scheduling an inspection, this field displays the current date by default. You can click the calendar icon to choose a different date. You can also choose "Get Next Working Day."</p> <p>If you are resulting an inspection, this field is read-only and displays the inspection scheduled date.</p>

<b>Scheduled Time</b>	Displays the current time. Use the drop-down lists to choose a different time and indicate whether the time is AM or PM.
<b>Scheduled Start Time</b>	Use the drop-down list to set an inspection start time.
<b>Scheduled Start Time AM/PM</b>	Use the drop-down list to set the AM or PM of the inspection start time.  <b>Note:</b> If configured by your agency administrator, you may be required to specify the inspection AM/PM only. Because without you specifying the actual inspection time, it is more convenient for inspectors to optimize their route sheet. You may only specify the Scheduled Start Time AM/PM with or without the Scheduled End Time AM/PM.
<b>Scheduled End Time</b>	Use this optional drop-down list to set an inspection end time.
<b>Scheduled End Time AM/PM</b>	Use the drop-down list to set the AM or PM of the inspection end time.  <b>Note:</b> If configured by your agency administrator, you may be required to specify the inspection AM/PM only. Because without you specifying the actual inspection time, it is more convenient for inspectors to optimize their route sheet. If you specify the Scheduled End Time AM/PM, you must also specify the Scheduled Start Time AM/PM.
<b>Start Mileage</b>	Enter the mileage from the odometer before you travel to a new inspection site.
<b>Start Time</b>	Enter the time when you started the inspection.
<b>Status</b>	The current status of the inspection. When you result an inspection, the status auto-fills based on the checklist results and the settings by your agency administrator. If you have no supervisor privileges, you may have no right to edit the field.
<b>Submit Date</b>	Automatically generated when you schedule and submit a new inspection.
<b>Submit Time</b>	Automatically generated when you schedule and submit a new inspection.
<b>Total Mileage</b>	Enter the total number of miles required. This value does not calculate automatically.
<b>Total Time</b>	Enter the total number of hours required to complete the inspection.
<b>Vehicle ID</b>	Enter a number that identifies the vehicle used to complete the inspection, such as the license plate number or VIN. The agency should determine how to identify the vehicle.
<b>Unit #</b>	Enter the unit number using any combination of alpha numeric characters.

## Inspection Route Sheet Fields

The table below lists and defines fields that may be available as you work with inspection route sheets.

Table 41: Inspection Route Sheet Fields

<b>Address</b>	The record address for the inspection.
<b>Alternate ID</b>	The alternate identification number for the inspection.
<b>Estimated End Time</b>	Use the drop-down list to choose the latest time that the inspector might arrive. You can also select the Estimated Start Time to form a time period when the inspector might arrive. The time period displays in the Estimated Arrival Time field in Citizen Access. If an applicant schedules an inspection in Citizen Access, this field displays the end time of the inspection time period.

<b>Estimated Start Time</b>	Use the drop-down list to choose the earliest time that the inspector might arrive. You can also select the Estimated End Time to form a time period when the inspector might arrive. The time period displays in the Estimated Arrival Time field in the inspection in Citizen Access. If an applicant schedules an inspection in Citizen Access, this field displays the start time of the inspection time period.
<b>Filter</b>	Click this button to filter the inspection list based on the criteria entered in the <b>Department, Inspector, and Scheduled Date</b> fields.
<b>Inspection Count</b>	The number of inspections scheduled each day.
<b>Inspection Type</b>	The type of inspection, such as Rough Grade, Plumbing, or Electrical.
<b>Order</b>	The inspection order in which Civic Platform schedules the inspections. Enter up to four integers in this field.
<b>Record ID</b>	The record identification number for the inspection.
<b>Request Comment</b>	Comments entered when the requestor created the inspection.
<b>Scheduled Date</b>	The date of the inspection.
<b>Scheduled End Time</b>	The projected end time for the inspection.
<b>Scheduled Time</b>	The projected start time for the inspection.
<b>Show Route Map</b>	Click this button to view or update an inspection route using Civic Platform GIS.
<b>Status</b>	The status of the inspection, such as Scheduled or Result Pending.
<b>Unit Nbr</b>	The number of inspection type units required to complete the inspection.

# Licenses

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Choose a topic from the list below to learn more about working with licenses.

## **Related Information**

[License Overview](#)

[Managing Renewal Information](#)

[Modifying License Details](#)

[Modifying Application Specific Information](#)

[Modifying License Contacts](#)

[Modifying Educational Credentials](#)

[Paying a License Fee](#)

[Managing Associated PERMITS Plus APDs](#)

[Examining License Details](#)

## License Overview

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You can use Civic Platform to handle a variety of different types of licenses. For example, an electrician needs an electrical license, a refrigerator repair man might need a mechanical license, a doctor must have a medical license, a business owner must have an operating license, and everyone who drives needs a drivers license.

When you work with licenses, you might need to perform a number of tasks. You might create new license applications, renew existing licenses, edit contact information, collect educational data, review the workflow and condition history, and more. In addition, you can add invoiced fees, take in payments, or check related payment history.

Agency administrators can configure the process for accepting license applications. If the applicant for a license is an Citizen Access public user, an agency administrator can accept or reject a license manually.

If your agency uses the PERMITS Plus permitting system, your agency administrator can configure certain Civic Platform list portlets so you can associate a PERMITS Plus APD to a Civic Platform record. This association enables you to view and search for associated APDs from the Civic Platform Licenses module.



## Managing Renewal Information

### Topics

- [Viewing License Renewal Information](#)
- [Renewing a License](#)
- [Renewing a License by Workflow](#)

### Viewing License Renewal Information

View the status of a license renewal to determine if a license is active, expired, delinquent, invalid, pending renewal, or about to expire. When you stay on top of license renewal statuses, you can help keep contractor, sub-contractor, and individual licenses current, enabling construction projects to proceed on schedule.

#### To view license renewal information

1. Go to the License portlet.
2. Use search as needed to find the license you want to view.
3. Click the link of the license you want to work with.
4. Click the Renewal Info tab.

Civic Platform displays the License Renewal Detail page.

Field Name	Value
Expiration Code	RENEWA_CODE
Grace Period Interval	30
Renewal Fee Function	SIMPLE_RENEWAL_FEE
Penalty Fee Code	NONE
Pay Period Group	NONE
Penalty Interval	30
Renewal Fee Code	NONE
Expiration Status	Pending
Expiration Interval	30
Number of Penalty Periods	0
Penalty Fee Function	PERCENTAGE_PENALTY_FEE
Expiration Date	01/31/2013

5. Review the fields described in [Renewal Information Fields](#).
6. Click **Cancel** to return to the previous view.

### Renewing a License

Professional and business licenses require renewal periodically to remain current and valid per applicable local, state, or federal law. You can check the status of a license to determine if the license is about to expire, has expired, or is delinquent.

When you initialize a license renewal, the information from the parent license copies automatically to a new application intake form for the applicant. Civic Platform processes this partial application as a child application to the parent license. After the renewal is submitted and the renewal process is complete, Civic Platform associates the most current information, such as expiration date, with the parent license.

A license renewal is complete when the application and required supporting tasks as defined in the renewal workflow are complete, and licensees pay in full any fees associated with the renewal. Tasks associated with a license renewal may include the passing of an exam, continuing education hours earned, or the submission of additional documents to the agency.

Users can renew a license and pay for the fees at the agency or online via Citizen Access. An agency can also manually move the license through the renewal process through Workflow. See [Renewing a License by Workflow](#).

### To renew a license

1. Navigate to the License portlet.
2. Use search as needed to find the license you want to view.
3. Click the link of the license you want to work with.  
Civic Platform displays the license detail in the record detail portlets.
4. Verify the status of the license if necessary. See [Viewing License Renewal Information](#).
5. Click the Renewal tab.  
Civic Platform displays the Renewal portlet.
6. Click **Renew**. This button displays only when a license expires, nears expiration, or is delinquent.



**Note:** If the license cannot be renewed and the supervisor override feature is enabled, the user sees a prompt indicating the error and allows a supervisor to override the blocked renewal. If a supervisor authorizes an override by entering his or her username, password, and an override reason, the renewal process continues. For details about the supervisor override, see [Supervisor Override](#).

Civic Platform opens the application intake form. The parent record information copies to the child record.

The screenshot shows a web browser window titled "Edit Record By Single -- Webpage Dialog". The form is organized into three columns:

- Record ID:** 12CAP-00000-0006X
- Priority:** --Select--
- Opened Date:** 11/08/2012
- Assigned to Staff:** CANDY
- Completed by Staff:** admin admin
- Closed by Staff:** admin admin
- Scheduled Time:** (dropdown menu)

**Record Type:** Building/AMO/AMO/AMO

**Short Notes:** (text input field)

**Total Job Cost:** 0

**Assigned Date:** (calendar icon)

**Completed Date:** (calendar icon)

**Closed Date:** (calendar icon)

**Detailed Description:** (text area with a "check spelling" link below it)

**Status:** approve

**Channel Reported:** --Select--

**Assigned to Department:** Current Department

**Permits:** (dropdown menu)

**Completed by Department:** Current Department

**Licenses:** (dropdown menu)

**Closed by Department:** Current Department

**Licenses:** (dropdown menu)

**Scheduled Date:** (calendar icon)

7. Enter data as available. For field definitions, see [Renewal Information Fields](#).
8. Click **Submit**.  
Civic Platform displays the renewal record in the renewal record list portlet for the parent license.

## Renewing a License by Workflow

Users at an agency can manually move a license through the renewal process by updating the New Status field for workflow tasks. Updating this field may be useful to a supervisor who needs to quickly force the renewal process to the next phase in the workflow due to an internal error at the agency.

### To manually move a license through the renewal workflow

1. Navigate to the License portlet.

2. Click the application related to the license renewal.  
Civic Platform opens the license details.
3. Click the Workflow tab.  
Civic Platform displays the Workflow Tasks detail.
4. Click the folder associated with the workflow task that you want to update. For example, the Application Process folder.  
Civic Platform displays the associated task details.
5. Locate the **New Status** field and choose one of the options from the drop-down list.  
For a list of options, see [Renewal Workflow New Status Options](#).
6. Click **Submit**.
7. Update the **New Status** fields for each workflow task folder as needed.  
Workflow Task Folders may include:
  - Application Submittal
  - Check Credentials
  - Review
  - License/Permit Issuance
  - License Status
  - Closure

## Modifying License Details

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You can modify the license renewal information for the record.

### To edit license details

1. Go to the License portlet.
2. Click the link of the license you want to renew. Use Search to locate a specific record.
3. Modify any fields that display on the Record page.  
For a list of field descriptions, see [License Details](#).
4. Click **Submit** to save your changes.  
Civic Platform displays the Record Specific Information page.

## Modifying Application Specific Information

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You can modify Information that is specific to a particular license application as needed.

For example, if configured by the agency administrator, users that want to update a trade name license can record three business or trade names. After the user saves the additional trade name, Civic Platform associates the updated license with the user's professional profile and sends an email notification of the additional trade name approval. For more information about professional profiles, see [Licensed Professionals](#).

### To modify license specific information

1. Go to the License portlet.
2. Click the link of the license you want to renew.
3. Click the App Specific Info tab.
4. Modify data as needed.  
Civic Platform displays the App Specific Info page.
5. Click **Submit** to save your changes.

## Modifying License Contacts

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Sometimes you may need to make changes to the contacts associated with a license. For example, a subcontractor may relocate his office, or replace employees, or you might add a homeowner so you can apprise him about the progress of the project. You can modify license contact details through the Contact tab of the license record.

### Topics

- [Adding a Contact to a License](#)
- [Deleting a Contact from a License](#)

### Adding a Contact to a License

1. Go to the License portlet and click the link of the license you want to modify.
2. Click the Contact tab in the record detail display.
3. Click **New**.  
Civic Platform displays the New Contact page.
4. Complete the fields with available data. See [Contact Details](#) for field definitions.
5. Click **Submit**.  
Civic Platform displays the contact list with the new contact.

### Deleting a Contact from a License

1. Go to the License portlet and click the link of the license you want to work with.
2. Click the Contact tab
3. Select each contact you want to delete.
4. Click **Delete**.  
Civic Platform deletes the contact from the list of contacts.

## Modifying Educational Credentials

Many agencies require licensed professionals to submit evidence of ongoing education and/or competence to maintain or renew their occupational licenses. You can add information to a license on the Education, Continuing Education, and Examination tabs. Your agency administrator can set up licenses by type so that users must fulfill certain requirements as part of the Check Credentials phase of a renewal workflow. For more information see [Renewing a License by Workflow](#).

### Topics

- [Modifying Education Information](#)
- [Modifying Continuing Education Information](#)
- [Modifying Examination Information](#)

### Modifying Education Information

Education information includes details about degrees, majors, and educational institutions attended.

#### To modify education information

1. Go to the License portlet and click the link of the license you want to modify.
2. Select the Education tab in the record detail portlet.

Civic Platform displays the Education information currently associated with this license.

Provider Name *	Provider Number	Degree *	Year Attended	Year Graduated	Discipline *
CET-6	12-PROVIDER-00	Bachelor	1998	2002	MBA

3. Modify the existing information as necessary
  - To insert a new row, click **Add**. For information on completing the form fields, refer to [Working in the Continuing Education Section](#).
  - To delete a row, select the line that you want to remove and then click **Delete**.
4. When you finish making your changes, click **Submit**.  
Civic Platform updates the record with your changes.

### Modifying Continuing Education Information

Continuing Education refers to the ongoing professional development requirements necessary for the maintenance or renewal of many occupational licenses. Requirements vary widely across professions, but typically include a specified number of Continuing Education units that a licensee must complete for recertification or renewal. Acceptable units may include specific course requirements, a certain number of private or informal study hours, a number of practical work hours during a given period, for example.

Civic Platform allows your agency to track the Continuing Education requirements as well as the progress made toward their completion on the Continuing Education tab of the license record.

#### To modify continuing education information

1. Go to the License portlet and click the link of the license you want to modify.

2. Select the Continuing Education tab in the record detail portlet.

Civic Platform displays the Continuing Education information currently associated with this license.

Record ID: APPL2012-03978

Menu ▾ Submit Add Reset Delete Help

Go To ▾ ◀ Continuing Education (1)

▶ Total Hours: 0

<input type="checkbox"/>	Continuing Education Name *	Required/Optional *	Provider Name *	Provider Number	Class *	Date of Class
<input type="checkbox"/>	DEVIN_Con Edu ▾	Optional	EthanProvider ▾	12-PROVIDER-00	Economics	<input type="text"/>

3. Modify the existing information as necessary

- To insert a new row, click **Add**. For information on completing the form fields, refer to [Working in the Continuing Education Section](#).
- Select the row to remove, then click **Delete**.

4. Click **Submit**.

Civic Platform updates the record with your changes.

## Modifying Examination Information

Agencies often use acceptable scores on certification level exams to demonstrate a certain level of competence before a licensee can obtain an occupational license.

Depending on your agency's agreement with external provider, the provider may maintain their exam data within Civic Platform or maintain their exam data on an external system and integrate the data with Civic Platform via a URL link. Civic Platform records exam modifications to the log. You can click the **View Log** button to view the change history. Consult with your agency administrator for the specific information that your agency needs provide to examination providers who choose to use this option.

Users can also enter examination information manually on the Examination tab of the license record.

### To modify examination information

1. Go to the License portlet and click the link of the license you want to modify.
2. Select the Examination tab in the record detail portlet.

Civic Platform displays the Examination information currently associated with this license.

Record ID: APPL2012-03978

Menu ▾ Submit Add Reset Delete View Log Help

Go To ▾ ◀ Examination (1) Education (0) Continuing Education (1)

<input type="checkbox"/>	Examination Name *	Required/Optional *	Provider Name	Provider Number	Examination Date	Start Time
<input type="checkbox"/>	French ▾	Optional	MARTHAPROV ▾	12-PROVIDER-	01/30/2012 <input type="text"/>	09 ▾ 00 ▾ AM ▾

3. Modify the existing information, as necessary

- To add a new exam session, click **Add**. For information on completing the form fields, see [Working in the Examination Section](#).
- To change to another exam session, click the **Reschedule** link, then select a reason for rescheduling from the pop-up window.



**Note:**

Agencies define the reasons for rescheduling and cancelling in the Standard Choice REASON\_FOR\_RESCHEDULING\_CANCELING\_EXAMINATION. See the Civic Platform Configuration Reference for more information about Standard Choices.

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If the fee items associated with the new exam are different from the ones in the previous exam session, Civic Platform keeps the fee items with the Paid status from the previous exam, deletes the fee items with the New status, and voids the fee items with the Invoiced and Unpaid status.

If the fee items associated with the new exam are the same as the ones in the previous exam session, Civic Platform keeps the existing fee items.

- To cancel an exam session, click the **Cancel** link next to the Examination Date, and then select a reason for canceling the session.

Civic Platform changes the schedule Status to Pending.

If the original status of the examination being canceled was Scheduled or Ready to Schedule, Civic Platform keeps the fee items with the Paid status, deletes the fee items with the New status, and voids the fee items with the Invoiced and Unpaid status.

- To remove an exam session, select the row that you want to remove and then click **Delete**.

Civic Platform keeps the fee items with the Paid status (but removes the association between the examination and fee items), deletes the fee items with the New status, and voids the fee items with the Invoiced and Unpaid status.

4. When you are finished making your changes, click **Submit**.

Civic Platform updates the record with your changes.

5. Click **View Log** to view changes to the exam schedules. See [Audit Logs](#) for more information.

## Paying a License Fee

After you complete the license information and then review the fee information associated with the license, you can apply the payment to the license. Based on an agency's business practices and user permissions, not all users may be able to apply payments to fees.

### To pay a license fee

1. Go to the License portlet and click the link of the license you want to modify.
2. Select the Payment tab in the record detail portlet.  
Civic Platform displays all the invoices and transactions related to the license.
3. Click **Pay**.  
Civic Platform displays the Fee Payment screen.

The screenshot shows the 'Fee Payment' screen in Civic Platform. At the top, the record ID is 'APPL2012-03946'. Below this are buttons for 'Menu', 'Save', 'Pay More', 'Reset', 'Cancel', and 'Help'. A navigation bar includes 'Go To' and tabs for 'Summary', 'Record', '-ASI', 'ASI Tables (11)', 'Contact (0)', 'Docs (14)', 'Fees (3)', 'Payment', 'Pay Hist', '-Related', and 'Re'. The main form area contains several fields: 'Amount: \*' with a text input containing '1.00'; 'Reference #' with a text input; 'Received:' with a dropdown menu showing '--Select--'; 'Method: \*' with a dropdown menu showing 'Cash'; 'CC Auth. Code:' with a text input; 'Comments: \*' with a text area and a 'check spelling' link below it; 'Trust Account:' with a dropdown menu showing '--Select--'; and 'Payor:' with a text input.

4. Modify the applicable payment information fields as needed. See [Payment Information](#) for field definitions.  
Civic Platform displays the Payment Notice page.
5. Click **Submit**.  
Civic Platform displays the generate receipt page.
6. If you want to generate a receipt, click **Submit**.  
Civic Platform displays two windows: a detailed Receipt and a Receipt Summary. You can print the Receipt Summary page.

https://av.lst.acenla.com/?mode=viewTransPayReceipt&TransSeqNbr=2560&module=Bu...

**RECEIPT**

STATE OF MONTANA  
DLI  
301 S. PARK AVE.  
Mike Field

**Application:** 13CAP-00000020  
**Application Type:** Building/Carroll/Application/Parent record  
**Address:**

Receipt No.	144					
Payment Method	Ref Number	Amount Paid	Payment Date	Cashier ID	Received	Comments
Cash		\$20.00	01/22/2013	ADMIN		

**Work Description:**

**Receipt Summary**  
County of Sacramento Accounting & Fiscal Services

-----Customer Receipt-----

Session Nbr : 2  
Trans NBR : 144  
For Permit Nbr: 13CAP-00000020  
Business Date : 01/22/2013 01:03:56AM  
Today Date : 01/23/2013 12:35:45AM  
Permit Fee Due: \$400.00  
Admin Fee Due : \$0.00  
Total Amt Paid: \$20.00  
Operate ID : ADMIN  
CashDraweID :

-----  
Fee Items  
F1.....\$20.00

-----  
Total Invoice Amount: \$400.00  
Total Payment: \$0.00  
Balance: \$400.00

-----  
Cash Tendered \$20.00  
Change Due : \$0.00  
Unapplied : \$unapplied\$

Cash Tendered: \$20.00  
Check Tendered: (Ref#)  
Ref:

[Print Receipt](#) [Cancel](#)

- If you want to print the receipt, click **Print Receipt**  
Civic Platform prints the receipt on the default printer.

## Managing Associated PERMITS Plus APDs

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If your agency uses the PERMITS Plus permitting system, you can associate PERMITS Plus APDs to Civic Platform records. Civic Platform lists the associated APDs as child records in the licenses list.

### Topics

- [Associating a PERMITS Plus APD to a Record](#)
- [Viewing a Related PERMITS Plus APD](#)
- [Removing a Related PERMITS Plus APD](#)
- [Searching for a PERMITS Plus APD](#)

### Associating a PERMITS Plus APD to a Record

If your agency uses the PERMITS Plus permitting system and is transitioning to Vantage360, you can maintain your PERMITS Plus APD records even as you begin to create new records in Civic Platform. As your agency makes the transition from PERMITS Plus APDs to Civic Platform Records, you can associate existing APDs to newer records and work with them simultaneously.

#### To associate a PERMITS Plus APD to a Record

1. Use Search to locate the existing records with the data you want to copy.  
Civic Platform displays the record detail portlet.
2. Click the Related Records tab.  
Civic Platform displays the Related Record Records record detail portlet.
3. Click **Look Up**.  
Civic Platform displays a license Search portlet.
4. In the **Data Source** field drop-down menu, choose **P+ - Permit Plus**.  
Complete other fields as needed. For a list of fields definitions, see [Application Record Fields](#).
5. Click **Submit**.  
Civic Platform returns a list of PERMITS Plus APDs that match your search criteria.
6. Select the APD you want to associate.
7. Click **Select as Parent** to set the APD record as the parent of the current record, or click **Select as Child** to set the APD record as the child of the current record.  
Civic Platform associates the APD record to the Record.

### Viewing a Related PERMITS Plus APD

1. Use Search to locate the record with the data you want to copy.  
Civic Platform displays the detail portlet.
2. Click the Related Records tab.  
Civic Platform displays the APDs and Records related to the license. The symbol [P+] identifies APDs.

### Removing a Related PERMITS Plus APD

1. Use Search to locate the record with the data you want to copy.

Civic Platform displays the detail portlet.

2. Click the Related Records tab.

Civic Platform displays the APDs and Records related to the license. The symbol [P+] identifies APDs.

3. Select the PERMITS Plus APD you want to remove.

4. Click **Delete**.

Civic Platform removes the APD from the Related Records list.

## Searching for a PERMITS Plus APD

If your agency subscribes to PERMITS Plus, you can search for an APD from the Civic Platform Licenses portlet. Clicking an APD hyperlink launches PERMITS Plus and opens the selected record.

### To search for a PERMITS Plus APD

1. Navigate to the Service Requests or Building Permit portlet.

Civic Platform displays the list portlet.

2. Click **Search**.

Civic Platform displays the search portlet.

3. Locate the **Data Source** field drop-down menu and choose **P+ - Permit Plus**.

Enter other search criteria as needed.

4. Click **Submit**.

Civic Platform displays the APD search results. APD records show P+ as their data source; Civic Platform records show no data source.

5. Click the link for the record you want to view.

Civic Platform launches PERMITS Plus and displays the APD detail portlet.

## Supervisor Override

Supervisors can override Civic Platform's license renewal process that prevents citizens from renewing licenses when they have outstanding fees. For example, a citizen might have outstanding fees when they come to the agency for a license renewal. In this case, the citizen cannot renew the license because of the fee violation. However, if they pay the fees and submit proof of payment to the cashier, a supervisor can authorize the renewal of the license in real-time.

To allow a supervisor to override a blocked license renewal, a supervisor role must be designated by the Civic Platform administrator and the supervisor override functionality must be enabled for the renewal record type. For details about the required configuration, see *Civic Platform Administration Guide* > Enabling Supervisor Override.

Assuming the supervisor override feature is enabled and the supervisor role is set up, if an application or license to be renewed has unpaid fees, Civic Platform shows the following prompt when a cashier clicks the **Renew** button:

The screenshot displays the Civic Platform interface for a record with ID BLD14-00001. The 'Renewal (1)' tab is selected. A red error message states: "The renew process is blocked due to violation fee. Please complete payment or contact supervisor to override." Below this message are two input fields: "Supervisor" and "Passcode", each with an asterisk indicating a required field. There are "Authorize" and "Cancel" buttons. To the right, a secondary dialog box titled "Override Reason" is open, with a text area for input and "Submit" and "Cancel" buttons. An orange arrow points from the "Supervisor" field to the "Override Reason" dialog.

To override the renewal error, a user with the supervisor role can enter his/her username and password, click **Authorize**, and enter an override reason. When the supervisor clicks **Submit**, the renewal process is unblocked and continues to create the renewal record.

For more information about license renewal, see *Civic Platform Administration Guide* > License Renewal.

## Examining License Details

The following tables list and define the default fields available in the different interfaces you might encounter when you work with licensing.

- [License Details](#)
- [Renewal Information Fields](#)
- [Renewal Workflow New Status Options](#)
- [Contact Details](#)
- [Payment Information](#)

### License Details

The following table lists and defines fields that you may see on the License details portlet.

Table 42: License Details

<b>Alternate ID</b>	An alternate ID for the Record. Many agencies use a shortened form of the Record ID number.
<b>Brief Description</b>	A brief description that helps you to identify this license.
<b>Record ID</b>	The number used to identify a license. This number generates this automatically. You cannot modify this number.
<b>Record Name</b>	The name of the license.
<b>Record Type</b>	The type of license. The type may be a concatenation of module, type, sub-type, and category.
<b>Detailed Description</b>	A detailed work description for this license.
<b>Expiration Date</b>	The date the license expires.
<b>Expiration Status</b>	The status of the license (for example, about to expire, delinquent, active).
<b>Status</b>	The current status of the license. If you are updating license details, you can change this status. Use the drop-down list to choose a status.
<b>Status Group</b>	If you are searching for a license, you can specify what status group the license status belongs to.

### Renewal Information Fields

The following table lists and defines fields that you may see on the Renewal Information tab.

Table 43: Renewal Information Fields

<b>Expiration Code</b>	This is the code, set by your agency and agency administrator, that identifies the license renewal process.
<b>Expiration Date</b>	The expiration date of the license that Civic Platform automatically assigned when it created the license.
<b>Expiration Interval</b>	Indicates how often the license expires.
<b>Expiration Status</b>	Shows the current status of the license. Status may include: pending, expired, delinquent, or active.
<b>Grace Period Interval</b>	Indicates the length of the grace period after the license expires.

<b>Number of Penalty Periods</b>	Indicates the number of penalty periods allowed for this license. Each penalty period is the length of the penalty interval and occurs following the grace period or a previous penalty period.
<b>Pay Period Group</b>	The pay period group for this renewal process. Any fees assessed for licenses with this renewal process come from this pay period group.
<b>Penalty Fee Code</b>	This identifies the fee code used to calculate the penalty fee associated with the license.
<b>Penalty Fee Function</b>	This generates the penalty fee. Civic Platform runs this function within the License batch process. Civic Platform does not use the function if you choose to assess fees manually.
<b>Penalty Interval</b>	Indicates the length of each penalty period related to the license.
<b>Renewal Fee Code</b>	This code identifies the fee item used to calculate the renewal fee.
<b>Renewal Fee Function</b>	This allows you to generate a renewal fee. It is not used if you choose to assess fees manually.

## Renewal Workflow New Status Options

The following table lists and defines fields that you may have available in the Workflow Status.

Table 44: Renewal Workflow New Status Options

<b>Accepted</b>	An application review is complete; the information is acceptable.
<b>Accepted/ No Review</b>	The renewal is approved without a review of the renewal information.
<b>Approved</b>	The application has been reviewed; the information is acceptable.
<b>Denied</b>	The license cannot be reviewed. For example, the business did not pass an inspection.
<b>Issued</b>	The renewal has been accepted and the license issued.
<b>On Hold</b>	The renewal is postponed but not rejected. For example, the administrator needs to verify the payment information.
<b>In Process</b>	The renewal is in the process of completing the associated task.
<b>Not Issued</b>	The renewal has been accepted, but the license has not been issue.
<b>Not Required</b>	The step is not needed to renew the license.
<b>Pending</b>	The renewal is postponed but not rejected. For example, the administrator needs to verify the payment information.
<b>Ready to move to next task.</b>	The application requirements have been met and the renewal can move to the next task in the workflow.

## Contact Details

The following table lists and defines fields you may have available in the Contact Details.

Table 45: Contact Details

<b>Address 1</b>	The street address for the contact.
<b>City</b>	The city where the contact is located.
<b>Country</b>	The country the contact is located.
<b>Email</b>	The email address for the contact.
<b>Fax</b>	The fax number for the contact.
<b>First Name</b>	The first name of the contact.



<b>Last Name</b>	The last name of the contact.
<b>Notes</b>	Any additional notes that identify the contact.
<b>Organization Name</b>	The name of the organization the contact is affiliated with.
<b>Phone 1</b>	The primary phone number for the contact.
<b>Phone 2</b>	The secondary phone number for the contact.
<b>Preferred Channel</b>	The communication method that the contact prefers. For example, if a contacts prefers to be contacted via email, select "email."
<b>Relationship</b>	The contact's relationship to the license.
<b>State</b>	The state where the contact is located from the drop-down list.
<b>Type</b>	The contact type.
<b>Zip</b>	The zip code where the contact is located.

## Payment Information

The following table lists and defines fields you may have available in the Payment Information section.

Table 46: Payment Information

<b>Amount</b>	The payment amount.
<b>CC Auth Code</b>	The three digit authorization number located on back of the credit card.
<b>CC Exp Date</b>	The expiration date of the credit card being used for the payment.
<b>CC Holder Name</b>	The name of the credit card holder
<b>Comment</b>	Comments pertaining to the payment.
<b>Method</b>	The payment method. For example, cash, credit card, debit card, check, or money order.
<b>Payee</b>	The person who is paying the fee.
<b>Reference #</b>	The reference number associated with the payment. For example, a check number or the last four digits of a credit card.

## Model Maintenance

---

Choose a topic from the list below to learn more about working with models.

### **Related Information**

[Model Maintenance Overview](#)

[Creating a New Model](#)

[Deleting a Model](#)

[Creating a Model Record](#)

[Managing Variations](#)

[Examining Model Details](#)

## Model Maintenance Overview

---

You can create applications for a residence based on a model. A model is a preliminary work or construction that serves as a plan from which a final product is to be made.

To create new applications based on models, you must create and maintain the models. For example, suppose that a contractor plans to build a large subdivision containing five basic house models. Each of these models can have many different variations such as: the number of bedrooms and location, style of fireplaces, size of garage, and size and design of decks. The basic floor plans of these models will remain the same. The application types remain the same and a significant portion of the application information would be identical from application to application. You can create five different application models with variations to accommodate the different variation choices. Then, when the contractor submits building applications, you may simplify the application intake process by using existing models.

## Creating a New Model

---

Once you create a new model, you need to add variations and create a record model.

### To create a new model

1. Navigate to Modeling Maintenance.  
Civic Platform displays the Modeling Maintenance window.
2. Click **New**.  
Civic Platform displays the Model detail form.
3. Complete the fields with available data. See [Model Detail Fields](#) for field definitions.
4. Click **Submit**.  
Civic Platform adds the new model to the Modeling Maintenance list.
5. Add variations as necessary. See [Managing Variations](#).
6. Add a model record for the model. See [Creating a Model Record](#).

## Deleting a Model

---

You may delete a model when it is no longer used. Be certain that you will not need the model in the future because once a model is deleted, you cannot retrieve it.

### To delete a model

1. Navigate to Modeling Maintenance.

Civic Platform displays the Modeling Maintenance window.

2. Select the models you want to delete.

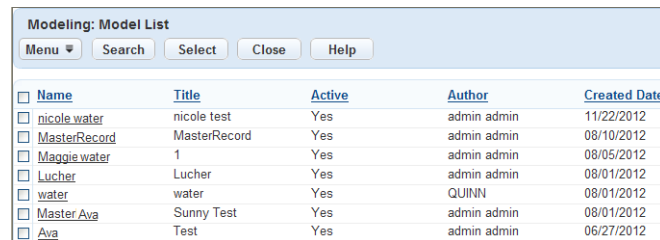
3. Click **Delete**.

Civic Platform deletes each model you selected and removes them from the model list.

## Creating a Model Record

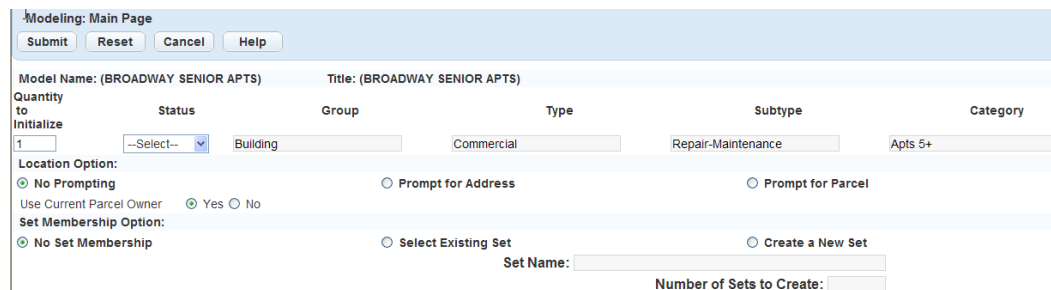
### To create a model record

1. Navigate to the Record portlet.  
Civic Platform displays the record list portlet.
2. Click **Create From Model**.  
Civic Platform displays a list of models.



<input type="checkbox"/>	Name	Title	Active	Author	Created Date
<input type="checkbox"/>	<a href="#">nicole.water</a>	nicole test	Yes	admin admin	11/22/2012
<input type="checkbox"/>	<a href="#">MasterRecord</a>	MasterRecord	Yes	admin admin	08/10/2012
<input type="checkbox"/>	<a href="#">Maggie.water</a>	1	Yes	admin admin	08/05/2012
<input type="checkbox"/>	<a href="#">Lucher</a>	Lucher	Yes	admin admin	08/01/2012
<input type="checkbox"/>	<a href="#">water</a>	water	Yes	QUINN	08/01/2012
<input type="checkbox"/>	<a href="#">Master.Ava</a>	Sunny Test	Yes	admin admin	08/01/2012
<input type="checkbox"/>	<a href="#">Ava</a>	Test	Yes	admin admin	06/27/2012

3. You can use search to locate the model you want to work with.
4. Select the models you want and then click Select or click the link in the Name column.  
Civic Platform displays the selected model details.



Modeling: Main Page

Submit Reset Cancel Help

Model Name: (BROADWAY SENIOR APTS) Title: (BROADWAY SENIOR APTS)

Quantity to Initialize: 1

Status: --Select--

Group: Building

Type: Commercial

Subtype: Repair-Maintenance

Category: Apts 5+

Location Option:

No Prompting  Prompt for Address  Prompt for Parcel

Use Current Parcel Owner:  Yes  No

Set Membership Option:

No Set Membership  Select Existing Set  Create a New Set

Set Name: \_\_\_\_\_

Number of Sets to Create: \_\_\_\_\_

5. Update the information for the model record as you would for a new application.  
You may need to supply application information, address information, owner information, application specific information, and other information depending on the application type. Remember that this is the model, so leave fields blank that will have different information for each application based on the model. See [Modeling Main Page Fields](#) for field definitions.
6. Click **Submit**.  
Civic Platform creates the model record.

## Managing Variations

---

A model serves as a template that can also auto-populate many fields on a new application. However, differences will arise from one application to another. For example, in a subdivision with three basic models, residents may choose to add bay windows, fireplaces, a central vacuum system, or they might increase the square footage of the family room, thereby increasing the overall square footage. Other residents might choose not to get central air conditioning or they might combine two adjoining bedrooms into one. Someone may remove certain features to get their house built on a tighter budget.

Such deviations can be managed by creating variations for a model. Each variation can list several choices, each of which can be configured to save time during the application intake process.

### Topics

- [Creating a Variation](#)
- [Deleting a Variation](#)
- [Establishing Choices for a Variation](#)
- [Deleting Variation Choices](#)
- [Establishing Choice Occupancies for a Variation](#)
- [Deleting Choice Occupancies from a Variation](#)

### Creating a Variation

The first step to creating a variation is to name it and establish the principle details. Once you have created a variation, you may add variation choices and occupancies. For instructions on managing variation choices, see [Establishing Choices for a Variation](#). For instructions on managing occupancies, see [Establishing Choice Occupancies for a Variation](#).

#### To create a variation

1. Choose Modeling Maintenance.  
Civic Platform displays the Modeling Maintenance window.
2. Create a new model or open the model you want to work with (see [Creating a New Model](#)).
3. Click the Variations tab.  
Civic Platform displays the Variations tab.
4. Click **New**.  
Civic Platform displays the Variation Detail form.
5. Enter available data in the form fields. See [Variation Details](#) for field definitions.
6. Click **Submit**.  
Civic Platform adds the new variation to the Variations tab.
7. Update variation details as described in [Establishing Choices for a Variation](#).

### Deleting a Variation

You may delete a variation if it is no longer needed or if it was created by mistake.

**Note:**

Deletion is permanent. If you are uncertain whether a variation is unnecessary, you can disable it rather than deleting it.

**To delete a variation**

1. Choose Modeling Maintenance.  
Civic Platform displays the Modeling Maintenance window.
2. Create a new model or open the model you want to work with (see [Creating a New Model](#)).
3. Click the **Variations** tab.  
Civic Platform displays the Variations tab.
4. Select the variation you want to delete.
5. Click **Delete**.  
Civic Platform removes the variation from the Variations tab.

**Establishing Choices for a Variation**

A variation typically provides choices. For example, you can create a fireplace variation that offers choices such as wood burning, electric, gas, or none. Or you can create a building materials variation that offers choices such as stone, brick, or marble.

**To establish choices for a variation**

1. Create a new variation or open the variation you want to work with (see [Creating a Variation](#)).  
Civic Platform displays the Variation Detail tab.
2. Click the Variation Choice tab.  
Civic Platform displays the Variation Choice tab.
3. Click **New**.  
Civic Platform displays the Choice Detail tab.
4. Enter data as appropriate.

<b>Choice Name</b>	This is the option you are offering. For example, if you are creating a fireplace variation, you can enter Gas Brick, Electric Brick, Gas Rock, and None as different choices.
<b>Default Choice</b>	Defines whether a choice is the default selection.
<b>Display Order</b>	This defines the display order of variation choices in the drop-down list. For example, if you want the most common variation choices listed at the top, you can set a high display order value.

5. Click **Submit**.  
Civic Platform adds the detail to the Variation Choice tab.

**Deleting Variation Choices****To delete variation choices**

1. Open the variation you want to work with.  
Civic Platform displays the Variation Detail tab.



2. Click the Variation Choice tab.  
Civic Platform displays the Variation Choice tab.
3. Select the variation choice you want to delete.
4. Click **Delete**.  
Civic Platform removes the selected variation choices from the Variation Choice tab.

## Establishing Choice Occupancies for a Variation

Choice occupancies are the details about a variation that save time and effort. For example, if a variation increases the square footage of a plan, the choice occupancy can automatically adjust the new square footage on the application.

### To establish choice occupancies for a variation

1. Create a new variation or open the variation you want to work with (see [Creating a Variation](#)).  
Civic Platform displays the Variation Detail tab.
2. Click the Variation Choice tab.  
Civic Platform displays the Variation Choice tab.
3. Click the link for the variation detail you want to work with.  
Civic Platform displays the Choice Detail tab.
4. Click the Choice Occupancies tab.  
Civic Platform displays the Choice Occupancies tab.
5. Click **New**.  
Civic Platform displays a Occupancy and Unit Type form.
6. Select the desired Occupancy and Unit Type values.
7. Click **Submit**.  
Civic Platform adds the occupancy to the Choice Occupancies tab.

## Deleting Choice Occupancies from a Variation

You may delete a choice occupation from a variation if it is no longer needed or if it was created by mistake. Deletion is permanent.

### To delete choice occupancies from a variation

1. Open the variation you want to work with.  
Civic Platform displays the Variation Detail tab.
2. Click the Variation Choice tab.  
Civic Platform displays the Variation Choice tab.
3. Click the link for the variation detail you want to work with.  
Civic Platform displays the Choice Detail tab.
4. Click the Choice Occupancies tab.  
Civic Platform displays the Choice Occupancies tab.
5. Select the choice occupancies that you want to delete.

**6. Click Delete.**

Civic Platform removes the selected occupancies from the Choice Occupancies tab.

## Examining Model Details

The tables in this section list and define the fields that you may see on the portlets and forms you work with when doing model maintenance.

### Model Detail Fields

The following table lists and defines the available fields (listed in alphabetical order) on the Model detail form.

Table 47: Model Detail Field Descriptions

<b>Active</b>	Indicates if a model active or disabled.
<b>Allow Others to Modify</b>	Indicates whether other users (other than the creator) can make changes to a model.
<b>Allow Others to Use</b>	Indicates whether other people within your agency can create applications using this model.
<b>Category</b>	The category of the model record.
<b>Created By</b>	The user who created the model.
<b>Created Date</b>	The model creation date.
<b>Detailed Description</b>	A description of the model. The description may include specifics that help to identify the model and set it apart from similar models.
<b>Group</b>	The group from the model record.
<b>Maximum Init Count</b>	This number defines how many applications a user can create from the model at any one time.
<b>Name</b>	The name for the model.
<b>Subtype</b>	The subtype from the model record.
<b>Title</b>	The title for your model.
<b>Type</b>	The type from the model record.

### Modeling Main Page Fields

The following table lists and defines the available fields (listed in alphabetical order) on the Modeling main page.

Table 48: Modeling Main Page Field List

<b>Category</b>	The category from the model record.
<b>Group</b>	The group from the model record.
<b>Location Option</b>	A suitable location for the modeling record. Options include: <b>No Prompting:</b> Civic Platform does not prompt a window and directly creates a model record. <b>Prompt for Address:</b> Civic Platform searches for an existing address and associate it with the model record. <b>Prompt for Parcel:</b> Civic Platform searches for an existing parcel and associate it with the model record. <b>Use Current Parcel Owner:</b> Defines whether to use the current parcel owner information.
<b>Maximum Init Count</b>	This number limits how many applications you can create from the model at any one time.

<b>Quantity to Initialize</b>	This is the quantity you want to initialize for your model.
<b>Set Membership Option</b>	Select Set Membership information.
<b>Status</b>	The status of the model.
<b>Subtype</b>	The subtype from the model record.
<b>Type</b>	The type from the model record.

## Variation Details

The following table lists and defines the available fields (listed in alphabetical order) for Variation.

Table 49: Variation Details

<b>Active</b>	Defines whether the variation is available for use.
<b>Allow Multiple Choice</b>	Defines whether to allow a user to choose one or more options for a single variation. For example, in an electrical variation, a person might select one or more of the following choices: additional outlets, ceiling fans, additional light switches, and stereo wiring.
<b>Display Order</b>	This defines the display order of variations. 1 is first in the display order.
<b>Variation Name</b>	A name for the variation.

## Choice Occupancy Details

The following table lists and defines the available fields (listed in alphabetical order) for Choice Occupancy.

Table 50: Choice Occupancy Details

<b>Adjust/Set</b>	Defines whether to adjust or set the square footage or the count. For example, a variation removes ten feet from the width of a two-story house that is 30 feet deep, you can adjust the square footage by -600 square feet.
<b>Display Order</b>	This defines the display order of occupancy choices.
<b>Occupancy</b>	Displays the occupancy that you chose when you created the variation choice occupancy. Use the valuation calculator to establish the occupancy options.
<b>Qty</b>	The quantity by which you want to adjust or set the square footage or the count. For example, if a variation adds a bay window that is three feet by five feet, you adjust the square footage by 15 feet.
<b>Sqft/Count</b>	Displays the square footage or the count that coincides with the variation choice occupancy. Use the valuation calculator to establish the square footage and the count.
<b>Unit</b>	Displays the unit that coincides with the variation choice occupancy. Use the valuation calculator to establish the units.
<b>Unit Type</b>	Displays the unit type that you chose when you created the variation choice occupancy. Use the valuation calculator to establish the unit types.

## Property

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Choose a topic from the list below to learn more about working with addresses, parcels, and owners (APO).

### **Related Information**

[Property Overview](#)

[Managing Addresses](#)

[Managing Parcels](#)

[Managing Owners](#)

[Managing Section, Township, and Range](#)

[Examining Property-Related Portlets](#)

## Property Overview

---

You can use Civic Platform to track the addresses, parcels, and owners related to an application. Typically, a property is the physical location of a building project. You can describe a property using official parcel information, standard address information, and owner information. Civic Platform stores the records you create using address, property, and owner information in your reference database.

Depending on your agency's settings, associated address, parcel, owner, structure, and establishment records can populate a permit record either automatically or following a prompt. This action facilitates data entry and ensures accuracy when creating a record. Talk to your agency administrator for information about reference data synchronization.

## Managing Addresses

---

When you search for an address when creating a new application, you are searching a database of stored addresses that you can associate with applications. Depending on your privileges, you may be able to create new reference addresses as well as modify existing address records in the database.

### Topics

- [Working with Reference Addresses on the Addresses Portlet](#)
- [Associating an Address with a Parcel](#)
- [Associating or Disassociating a Contact with an Address](#)
- [Associating or Dissociating an Address with an Application Record](#)
- [Associating an Address with an Address Type](#)
- [Associating an Inspection District with an Address](#)
- [Locating an Address with Accela GIS](#)
- [Working with External APO Data](#)

### Working with Reference Addresses on the Addresses Portlet

Use the Addresses portlet to search for, edit, or add addresses to the reference database. You cannot delete addresses from the reference database after you add them. However, you can disable an address, which prevents users from associating that address with new applications, while preserving any existing association of the address in an application.



#### Note:

The ability to add or edit reference addresses to the database is dependent on your user privileges. If you do not have sufficient privileges, you can add an address to an application manually (see [Adding a New Address to a Building Application](#)).

### To locate an existing reference address

1. Click the **Addresses** main link.  
Civic Platform displays the Addresses Search page.
2. Locate the address you want to work with and click the link.  
Civic Platform displays the address details.
3. If you are editing the address record, make changes to the address fields as needed, then click **Submit**.  
If you want to view a list of applications associated with the address, click the Record Detail tab.

### To add a reference address

1. Click the **Addresses** main link.  
Civic Platform displays the Reference Address Search page.
2. Click **Cancel**.  
Civic Platform displays the Reference Address list portlet.
3. Click **New**.

Civic Platform displays the address details on the tabs.

4. Enter data in the Address fields as available, taking care to populate required fields. See [Address Fields](#) for field definitions.
5. Click **Submit**  
Civic Platform creates the new reference address, which is now available for association to applications.

## Associating an Address with a Parcel

You can associate one or more parcels to a reference address. Your agency can configure Civic Platform to update parcel information (either automatically or at a prompt) in an application when a user adds or removes the associated address.

### To associate a parcel to an address

1. Locate an existing reference address in the Addresses list portlet (see [Working with Reference Addresses on the Addresses Portlet](#)) and click the link for the address you want to work with  
Civic Platform displays the address details on the tabs.
2. Click the Parcel tab in the Address detail form.  
If there are existing parcels associated with the address, Civic Platform lists them in this tab.
3. Click **New**.  
Civic Platform displays a detail form.
4. Identify the parcel you want to associate.
  - To enter a parcel manually, complete the Parcel form and click **Submit**.
  - To locate and select an existing parcel, click **Look Up**. Enter search criteria as needed to locate the desired parcel and click **Submit**. Select the parcel(s) you want to associate and click **Select**.  
Civic Platform confirms that it successfully associated the parcel to the address.

## Associating or Disassociating a Contact with an Address

You can create associations between contacts and addresses, which allows for a contact to have address information independent of the owner-parcel relationship. A contact can also have an address associated with a parcel as needed.

### To associate an address to a contact

1. Locate an existing reference address in the Addresses list portlet (see [Working with Reference Addresses on the Addresses Portlet](#)) and click the link for the address you want to work with.  
Civic Platform displays the address details on the tabs.
2. Click the Contact tab.  
Civic Platform displays the address contact list page.
3. Identify the contact you want to associate.
  - To enter a new contact, click **New**, complete the Contact Detail form (see [Contact Detail Fields](#) for field descriptions), then click **Submit**.
  - To locate and select an existing contact, click **Look Up**. Enter search criteria as needed to locate the desired contact and click **Submit**. Select the contact(s) you want to associate and click **Select**.



Civic Platform displays the contact in the contact list portlet.

### To disassociate a contact from an address

1. Locate the address you want to work with in the Addresses list portlet (see [Working with Reference Addresses on the Addresses Portlet](#)) and click the link for the address.

Civic Platform displays the address details on the tabs.

2. Click the Contact tab.

Civic Platform displays the address contact list page.

3. Select each contact you want to disassociate from the address.

4. Click **Delete**.

Civic Platform deletes the contact from the address.

### Associating or Dissociating an Address with an Application Record

You can associate one or more addresses with an application. You can add addresses manually, or select an address from the reference database. Your agency can configure Civic Platform to update parcel, owner, structure, or establishment information associated with the address (either automatically or at a prompt) in an application when a user adds or removes the associated address.

#### Topics

- [Adding an Address from a Reference Database](#)
- [Adding a New Address to a Building Application](#)
- [Viewing Associated Applications](#)
- [Editing an Address on a Record](#)
- [Removing an Address from an Application](#)

### Adding an Address from a Reference Database

#### To add an address from your reference database

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.

2. Click the link in the Record ID column for the record you want.

Civic Platform displays the application details.

3. Click the Addresses tab that displays on the tabs.

4. Click **Look Up**.

5. Enter search criteria as needed to located the desired address.

6. Click **Submit** to execute the search.

Civic Platform displays your search results.

7. Select each address you want to add.

8. Click **Select**.

9. If any parcel, owner, structure, or establishment records has an association with the address, one of the following occurs, depending on your agency's settings:
- The associated reference data automatically populates the application. If this is the case, you do not receive notification that the data populated until you click **Submit** in the next step.
  - Associated reference data displays. Select which data you want to add to the application then click **Select**.

Parcel #	Address
<input type="checkbox"/> 1N231CB11100	
<b>Owner</b>	
<input type="checkbox"/> FIRST BAPTIST CHURCH	OF HILLSBORO PO BOX 186 HILLSBORO ,OR 97123
<input type="checkbox"/> WILLIAM TAYLOR	FLAGSTAFF AZ 86001

Civic Platform adds the address and any associated reference data that you selected to the application.

- If the associated reference data does not populate automatically or there is no prompt, you must manually add the data to the record.

#### 10. Click **Submit**.

Civic Platform adds the address to the work order or the asset.

## Adding a New Address to a Building Application

You can add an address to a record manually when you do not find it in the reference database.



#### Note:

Civic Platform does not store new addresses that you add from these areas in the reference database. To add a new address to your reference database, see [Working with Reference Addresses on the Addresses Portlet](#).

### To add an address to a building application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want. Civic Platform displays the application details.
3. Click the Addresses tab that displays on the tabs.
4. Click **New**.
5. Complete the fields with available data. See [Address Fields](#) for field definitions.
6. Click **Submit**. Civic Platform saves the address.

## Viewing Associated Applications

You can view reference addresses associated with applications from the Addresses portlet. You can view application details by selecting the ID for the application.

### To view applications associated with a reference address

1. Navigate to the Addresses portlet and use Search to find the address you want to work with.
2. Click the link the Street # column for the address you want to view.  
Civic Platform displays the address details.
3. Click the Record List tab.  
Civic Platform displays a list of applications associated with the address.
4. To view or update application details, click the link to the application that you want to view.

### Editing an Address on a Record

After you add an address to a record, you can modify the address details as needed.



#### Note:

Editing an address for an application does not change the details about the address in your reference database or affect any other applications with the same address. The changes affect only the application that you are currently working on.

### To edit an address for an application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Addresses tab.  
Civic Platform displays the address associated with the application.
4. Locate the address you want to edit in the Street # column.  
Civic Platform displays the Address Detail portlet.
5. Edit any of the fields that display. For a description of the fields, see [Address Fields](#).
6. Click **Submit**.  
Civic Platform saves the changes to the address.

### Removing an Address from an Application

If an address is no longer relevant to the item or is no longer an association, you can remove it from the application. Removal of an address from an application does not delete the address from the reference database, however, not does it affect other applications associated with the same address. Removal of an address from an application only removes the association between the address and application.

#### To delete a address from an application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the record details portlet.
3. Click the Addresses tab.  
Civic Platform displays a list of addresses associated with the application.

4. Choose the addresses you want to delete.
5. Click **Delete**.
6. If any parcel, owner, structure, or establishment record has an association with the address, one of the following occurs, depending on your agency's settings:
  - The associated reference data automatically deletes from the record.
  - A pop-up window displays the associated reference data. You can select which data you want to delete from the record, then click **Select**.

Parcel #	Owner Name	Address
<input type="checkbox"/> 1N231CB11100		
	<input type="checkbox"/> FIRST BAPTIST CHURCH	OF HILLSBORO PO BOX 186 HILLSBORO ,OR 97123
	<input type="checkbox"/> WILLIAM TAYLOR	FLAGSTAFF AZ 86001

Civic Platform removes the address and any associated reference data that you selected from the application.

- If the associated reference data does not delete automatically and no prompt displays, you must manually delete the data from the record.

Civic Platform removes the address from the list.

## Associating an Address with an Address Type

You can associate an address with an address type, such as Street Address or Parcel Address. Address types enable users to classify and group addresses according to the application type. Address types apply to multiple portlets including Address, Asset, Parcel, and Record.

### To associate an address with an address type

1. Navigate to the Addresses portlet and use Search to find the address you want to work with.
2. Create a new address or select the address you want to associate with an address type.  
Civic Platform displays the address details.
3. Click the Address Type tab.  
Civic Platform displays the Address Type portlet.

Address Type	Description
<input type="checkbox"/> Right of Way	

4. Click **Look Up**.  
Civic Platform displays the Address Type Lookup portlet.

Address: 400 Van Ness Ave Ave, San Francisco, CA 94102

Menu Submit Reset Cancel Help

Address Detail Address Type Record List Conditions

Address Type Description

check spelling

5. Enter the Address Type and Description and click **Submit**.  
Civic Platform displays all address types that match your look up criteria.

Address: 400 Van Ness Ave Ave, San Francisco, CA 94102

Menu Select Look Up Cancel Help

Address Detail Address Type Record List Conditions Contact District Parcel Activity Comments Associated Public User

<input type="checkbox"/>	Address Type	Description
<input type="checkbox"/>	Asset Address	
<input type="checkbox"/>	Right of Way	
<input type="checkbox"/>	Address Type	

6. Select the address type(s) you want to associate with the address.
7. Click **Select**.

Civic Platform adds the selected address type(s) to the address.

Address: 400 Van Ness Ave Ave, San Francisco, CA 94102

Menu Look Up Delete Help

Address Detail Address Type (3) Record List Conditions (0) Contact (0) District

1 address type(s) added successfully.

<input type="checkbox"/>	Address Type	Description
<input type="checkbox"/>	Asset Address	
<input type="checkbox"/>	Right of Way	
<input type="checkbox"/>	Street Row	
<input type="checkbox"/>	Address Type	

8. To remove an address type, select the address type you want to remove, and click **Delete**.  
Civic Platform updates the address record.

## Associating an Inspection District with an Address

Users can group the addresses assigned to them by district. For example an inspector can group addresses as he organizes inspections within a designated area. For more information about districts, see Chapter 47, Inspections, in the *Accela Civic Platform Administrator Guide*.

### To assign a district to an address

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Address tab.  
Civic Platform displays the address list in the detail portlet.

Record ID: BLD12-00012

Menu ▾ New Delete Look Up Search and Select Look up Tidemark address Search P+

Go To ▾ Summary Record Activities (0) Activity Summary (1) Address (1) Addtl Info

<input type="checkbox"/> #	Dir	Street	St Type	Unit Type	Unit #	City	Zip	Primary
<input type="checkbox"/> 2012		Bishop	Dr			San Ramon	94583	Yes

- Under the Number column in the address list, click the hyperlinked name of the address. Civic Platform displays the Address Detail portlet.
- Click the District tab. Civic Platform displays the District tab in the detail portlet.

Record ID: BLD12-00012

Menu ▾ Search GIS Delete Cancel Help

Address Detail District

Inspection District

0 record(s) found.

- Click **Search**. Civic Platform displays the Inspection District list in the detail portlet.

Menu ▾ Submit Cancel Help

District

A2

A3

Balint District for Areas-0001

South

- Select the district(s) you want to assign to the address.
- Click **Submit**. Civic Platform displays the selected district(s) in the District list.

Record ID: 2012-COMB-MTN-000003

Menu ▾ Search GIS Delete Cancel Help

Address Detail District

The district created successfully.

Inspection District

Balint District for Areas-000

## Locating an Address with Accela GIS

You can use Accela GIS to locate addresses. Accela GIS is an interface that works in conjunction with the Civic Platform V360 interface to provide automated maps from a central database. Accela GIS gives staff direct access to view geographic representations of all land-use, zoning, and infrastructure information associated with a parcel, permit, inspection, or plan. If your agency uses Accela GIS, you can use the map viewer to locate an address and any related applications.

For more information on how to locate an address using Accela GIS, refer to the Accela Civic Platform GIS documentation set.

### To locate addresses with Accela GIS

- Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.

2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Addresses tab.  
Civic Platform displays a list of addresses associated with the application.
4. Select each address you want to view on the map.
5. From the drop-down located next to the GIS button, select the map service you want to use.
6. Use the GIS toolbar buttons to locate an address, locate the latitude and longitude, or save a location.  
You can also center the map and zoom in or zoom out.  
Civic Platform displays the addresses you selected as red dots on the Accela GIS map.

## Working with External APO Data

Your agency administrator can configure the Address portlet in a way that allows you to view records associated with address data from an external application server . You can also run reports for associated records. For information on running reports, see [Accessing and Running a Report via a List Portlet](#).

### To view external APO data

1. Find the address you want to work with.  
Navigate to the Addresses portlet and click **Search**.
2. Complete any fields that display. For a description of the fields, see [Address Fields](#).
3. Locate the address you want to work with in the Street # column.  
Civic Platform displays the address details.
4. Click the Record List tab.  
Civic Platform displays the records associated with the selected external address information.

# Managing Parcels

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When you search for a parcel when creating a new application, you are searching a database of stored parcels that you can associate with applications. Depending on your privileges, you may be able to create new reference parcels as well as modify existing parcel records in the reference database.

## Topics

- [Adding a Reference Parcel](#)
- [Searching for a Reference Parcel](#)
- [Associating a Parcel to an Application](#)
- [Working with Parcel Conditions](#)
- [Working with Parcel Documents](#)
- [Working with Associated Inspection Districts](#)
- [Working with Reference Data](#)
- [Working with Parcel Activities](#)
- [Associating a Public User with a Parcel](#)
- [Working with Associated Trust Accounts](#)
- [Establishing a Parcel Genealogy](#)
- [Working with External APO Data](#)
- [Viewing Parcels in Accela GIS](#)

## Adding a Reference Parcel

You can add new parcels to your reference database. After you add a reference parcel, you can look up the parcel when associating parcels with a specific application.

### To add a reference parcel

1. Click the **Parcels** main link.  
Civic Platform displays the Reference Parcel Search page.
2. Click **Cancel**.  
Civic Platform displays the Reference Parcel list portlet.
3. Click **New**.  
Civic Platform displays the Create New Parcel page.
4. Complete any of the fields that display. See [Parcel List Portlet Fields](#).
5. Click **Submit**.  
Civic Platform adds the parcel to the reference database.



## Searching for a Reference Parcel

After you add a parcel to your reference database, you can search for the parcel and view the parcel details as well as any applications that the parcel has an association with. The parcel number is the only required field when searching for a parcel.

The parcel number, owner name, and street name fields support wildcard searches. See [Performing a Wildcard Search](#) for information.

### To search for a reference parcel

1. Navigate to the Parcels portlet and click **Search**.
2. Complete any fields that display. For a description of the fields, see [Parcel List Portlet Fields](#).



#### Note:

According to your agency's settings and the form layout, there may be template fields in addition to the standard fields listed in [Parcel List Portlet Fields](#). The additional fields are active attributes defined in the parcel template in Civic Platform.

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3. Locate the parcel you want to work with in the Parcel # column.  
Civic Platform displays the parcel details.
4. To add a parcel to a record, click **Add reference parcel to record**.
5. To view a list of applications associated with the parcel, click the Record Detail tab.

## Associating a Parcel to an Application

You can associate one or more parcels to an application.

Agencies can configure Civic Platform such that any address, owner, structure, or establishment record associated to a parcel populates to a record when you associate the parcel to the record. Contact your agency administrator for information about your agency's configured functionality for synchronizing reference data.

### Topics

- [Adding a New Parcel to an Application](#)
- [Adding a Parcel from a Reference Database](#)
- [Viewing Records Associated with a Parcel](#)
- [Adding Records into a New Set](#)
- [Copying or Moving Applications Between Parcels](#)
- [Editing a Parcel Associated with an Application](#)
- [Removing a Parcel from an Application](#)

## Adding a New Parcel to an Application

Civic Platform does not store any new parcels that you add to an application in your reference database. To add a new parcel to your reference database, see [Adding a Reference Parcel](#).

### To add a new parcel to a building application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.

2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Parcels tab.
4. Click **New**.
5. Complete any of the fields that display.  
For descriptions of common fields, see [Parcel List Portlet Fields](#).
6. Click **Submit**.

## Adding a Parcel from a Reference Database

You can add a parcel to an application by searching for an existing parcel in your reference database.

### To add a parcel from a reference database

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.  
Civic Platform displays the application details.
3. Click the Parcel tab.
4. Click **Look Up** to locate a reference parcel.
5. Enter search criteria as needed to locate the parcel you want and click **Submit**.  
Civic Platform displays your search results.
6. Select the parcels you want to add.
7. Click **Select** to add the reference parcel to a record.
8. If the parcel has any associated addresses, owners, structures, or establishments, one of the following occurs, depending on your agency's settings:
  - The associated reference data automatically populates the application. If this is the case, you do not receive notification that the data uploaded until you click **Submit** in step 11.
  - A pop-up window displays the associated reference data. Select which data you want to add to the record and then click **Select**.

Select    Cancel    Help										
<input type="checkbox"/> Select All										
Address										
<input type="checkbox"/> Primary	Street # (start)	Direction	Street Name	Street Type	City	State	Zip Code	Address Status	Street Suffix (Direction)	
<input type="checkbox"/> Y	4400		CROCKER	AVE	DALY...	CA	94104	Enabled		
<input type="checkbox"/> Y	4		LARKIN	ST	SAN ...	CA	94102	Enabled		
<input type="checkbox"/> Y	7		MISSION	ST	SAN ...	CA	94112	Enabled		

Owner										
<input type="checkbox"/> Primary	Name	Address Line 1	Address Line 2	Address Line 3	Mail City	Mail State				
<input type="checkbox"/> Y	CAMILLE LE-BLANC BAZINET	4400 KETTLEBELL LANE APT# D			BURLINGAME	CA				
<input type="checkbox"/> N	CLANCY WIGGUM	1 SPRNGFIELD STREET			SAN FRANCISCO	CA				

Structures										
<input type="checkbox"/> ID	Name	Group	Type	Status	Status Date	Land Use	Description	Record Status		
<input type="checkbox"/> 09-STR-00002	P62	STRUCTURE	Str_Prod_Mat	012345678...	06/18/2009		12321	A		
<input type="checkbox"/> 10-STR-00007	hello 28	STRUCTURE	Str_Prod_Mat	Existing	02/27/2010			A		
<input type="checkbox"/> 2145664	t46	STRUCTURE	Str_Prod_Mat	012345678...	02/27/2010			A		

The parcel and any associated reference data that you selected upload to the application.

- If associated reference data does not upload automatically or following a prompt, you must manually add the data to the record.

**9. Click Submit.**

The Parcel tab displays a message that Civic Platform added the parcels.

**Viewing Records Associated with a Parcel**

After you look up a reference parcel, you can view a list of record associations for the parcel .

**To view records associated with a reference parcel**

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the parcel that you want to work with.  
Civic Platform displays the parcel details.
3. Click the Associated Record List tab.  
Civic Platform displays a list of records associated with the parcel.

Parcel #: 00001-1-					
Menu ▾	Copy	Move	Create a Set	Help	
Parcel Detail	Associated Record List	Genealogy Summary	Conditions (0)	Document	District
<input checked="" type="radio"/> From Current Parcel Only	<input type="radio"/> From Current Parcel or Its History				
<input type="checkbox"/> <u>Work Order No</u>	<u>Work Order Type</u>	<u>Status</u>	<u>Opened</u>	<u>Assigned to Staff</u>	
<input type="checkbox"/> <a href="#">IRR-9414516</a>	Building/Residential/Irrigation/NA	Closed	11/23/1994		
<input type="checkbox"/> <a href="#">ELE-9414698</a>	Building/Residential/MEP/Electrical	Closed	12/28/1994		
<input type="checkbox"/> <a href="#">CODE-12-0256</a>	Enforcement/Landscape and Tree/NA/NA	Withdrawn	04/23/2012	Patty Moos	
<input type="checkbox"/> <a href="#">2CE-9414698</a>	Building/Commercial/MEP/Electrical	Closed	12/28/1994		
<input type="checkbox"/> <a href="#">1K-9414516</a>	Building/Residential/Irrigation/NA	Closed	11/23/1994		

**4. Complete one of these options:**

- Select the **From Current Parcel Only** option.

Civic Platform displays the records associated with the selected parcel on the Associated Record List tab.

- Select the **From Current Parcel or Its History** option.  
Civic Platform displays the records associated with the selected parcel and its parents, grandparents, or ancestors on the Associated Record List tab.

5. To view or update record details, click the link to the record that you want to view.

## Adding Records into a New Set

You can add records associated with a reference parcel or its genealogically related parcels into a new set.

### To create a set of parcel records

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the parcel that you want to work with.  
Civic Platform displays the parcel details.
3. Click the Associated Record List tab.  
Civic Platform displays a list of records associated with the parcel.
4. Select the records that you want to add into a new set.
5. Click **Create a Set**.

Civic Platform displays the SET ID form in the portlet.

Parcel #: 00016--1-11

Menu Submit Reset Cancel Help

Parcel Detail Associated Record List Genealogy Summary Conditions Document District Address Owner Activity

Set ID

Set Name \*

Comments

Set Type --Select--

Set Status --Select--

Set Status Comments

6. Complete the fields with available data.

**Set ID** This is an alphanumeric abbreviation that identifies the new set. For example, enter "EDP." The value may be auto-generated.

**Set Name** This is a name that identifies the new set.

7. Click **Submit**.

Civic Platform creates the set and adds all the selected records into the set.

## Copying or Moving Applications Between Parcels

When you split or merge a parcel, you may need to adjust the parcel-application associations. To help accomplish this task, Civic Platform enables you to copy or to move applications between genealogically related parcels.

### To copy or move an application

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the parcel that you want to work with.

Civic Platform displays the parcel details.

3. Click the Associated Record List tab.

Civic Platform displays the Associated Record List tab for the parcel.

4. Select the application that you want to copy or move.

5. Click **Copy** to copy the application to a genealogically related parcel.

Click **Move** to move the application to a genealogically related parcel.

Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.

6. Select the parcel(s) that you want to copy or move the application to.

7. Click **Submit**.

If you are copying, Civic Platform attaches the selected application to the newly selected parcel(s) while retaining the association between the application and the original parcel.

If you are moving, Civic Platform attaches the selected application to the newly selected parcel(s) and removes the application from the original parcel.

## Editing a Parcel Associated with an Application

After you add a parcel to an application, you can edit the parcel details as needed to correct mistakes or complete partial information.



### Note:

When you edit a parcel for an application, you are not changing the details about the parcel in your reference database, nor do your changes affect any other applications with the same parcel. Your changes affect only the current application.

---

### To edit an parcel associated to an application

1. Navigate to the portlet you are working in, and use search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want. Civic Platform displays the record detail portlet.
3. Click the Parcels tab. Civic Platform displays a list of parcels associated with the application.
4. Click the Parcel # link for the parcel that you want to edit. Civic Platform displays the parcel details.
5. Update parcel data as needed. See [Parcel List Portlet Fields](#) for field definitions.
6. Click **Submit**.

## Removing a Parcel from an Application

You can remove a parcel from an application as needed. Removal of a parcel from an application does not delete the parcel from your reference database, nor does it affect other applications associated with the same parcel.

### To delete a parcel from an application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want. Civic Platform displays the application details.
3. Click the Parcels tab that displays on the tabs. Civic Platform displays a list of parcels associated with the application.
4. Select the parcel(s) you want to delete.
5. Click **Delete**.
6. If the parcel has any associated addresses, owners, structures, or establishments, one of the following occurs, depending on your agency's settings
  - Civic Platform automatically removes the associated reference data from the record and notifies you of the action.
  - A pop-up window displays the associated reference data. Select which data you want to remove from the application and then click **Select**.  
Civic Platform removes the parcel and any associated reference data that you selected from the application.
  - If Civic Platform does not remove the associated reference data automatically or following a prompt, you must manually remove the data from the record.  
Civic Platform updates the parcel list, removing the parcel you selected and other associated reference data, where applicable.

## Working with Parcel Conditions

After you create parcel records, you can use the Conditions tab to manage the conditions applied to parcels. Based on your agency's user group settings, you may or may not have access to the parcel conditions and all the features described in this section. Contact your agency administrator for more information.

### Topics

- [Adding a Condition](#)
- [Viewing Associated Conditions](#)
- [Copying or Moving a Condition](#)
- [Deleting a Condition](#)

## Adding a Condition

You can create a custom condition for the parcel or apply a standard condition associated with the parcel group or parcel type. For detailed information on conditions, see [Conditions](#).

### To add a custom condition to a parcel

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column. Civic Platform displays the parcel details.
3. Click the Conditions tab.

Civic Platform displays the Conditions tab for the parcel.

4. Click **New**.

Civic Platform displays the New Condition portlet.

5. If you are creating a custom condition, complete the fields with available data. For a description of the fields, see [Conditions Form Fields](#).

6. If you are creating a standard condition:

a. Click the appropriate **Standard Condition** hyperlink.

Civic Platform displays the Standard Condition search portlet.

b. Enter search criteria to locate the standard condition you want, then click **Submit**.

Civic Platform returns a list of standard conditions that match your search criteria.

Group	Condition Name	Comment	Type	Severity
Licensing	Driver's ...	This requ...	License R...	Required
Licensing	Proof of ...	This requ...	License R...	Required

c. Click **Edit** for the standard condition you want to attach to the parcel.

Civic Platform populates the New Condition form with the values from the standard condition you selected.

d. Edit the fields as needed.

7. Click **Submit**.

Civic Platform adds the condition to the record.

## Viewing Associated Conditions

You can view the custom conditions and standard conditions applied to a parcel or the conditions applied to the parcel and its parents, grandparents, or ancestors.

### To view associated conditions

1. Navigate to the Parcels portlet.

2. Locate the parcel you want to work with, and click the link in the Parcel # column.

Civic Platform displays the parcel details.

3. Click the Conditions tab.  
Civic Platform displays the Conditions tab for the selected parcel.
4. Select whether to display conditions for the current parcel (**From Current Parcel Only**), or for the current parcel and its parents, grandparents, or other ancestors (**From Current Parcel or Its History**).
5. Click the link to any condition to view details.

## Copying or Moving a Condition

When you split or merge a parcel, you may need to adjust the conditions applied to the parcel. To help accomplish this task, Civic Platform enables you to copy or to move conditions between genealogically related parcels.

### To copy or move a condition

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the Conditions tab.  
Civic Platform displays the Conditions tab for the parcel.
4. Select the condition that you want to copy or move.
5. Click **Copy** to copy the associated condition to a genealogically related parcel.  
Click **Move** to move the associated condition to a genealogically related parcel  
Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.
6. Select the parcel that you want to copy or move the condition to.
7. Click **Submit**.  
If you are copying, Civic Platform associates the selected condition with the newly selected parcel while retaining the association between the condition and the original parcel.  
If you are moving, Civic Platform associates the selected condition to the newly selected parcel and dissociates the condition with the original parcel.

## Deleting a Condition

You can delete any associated condition for a parcel. After you remove the condition, it is no longer applied to the parcel, but it is still available for review only on the Conditions tab.

### To delete a condition

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the Conditions tab.  
Civic Platform displays the Conditions tab for the parcel.
4. Select the **From Current Parcel Only** option.  
Civic Platform displays the conditions associated with the selected parcel on the Conditions tab.



5. Select the condition you want to delete.
6. Click **Delete**.  
Civic Platform disables the condition.

## Working with Parcel Documents

After you have created parcel records, you can use the Document tab for the parcel to manage associated documents. For detailed information about uploading, downloading, and removing documents, as well as viewing document information, see [Attachments](#) . Based on your agency's user group settings, you may or may not have access to all the features described in this section. Contact your agency administrator for more information.

### Topics

- [Viewing Associated Documents](#)
- [Copying or Moving a Document](#)
- [Downloading and Printing Multiple Documents](#)

## Viewing Associated Documents

You can view the documents associated with a parcel or the documents associated with the parcel and its parents, grandparents, or ancestors.

### To view attached documents

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the Document tab.  
Civic Platform displays the Document tab for the selected parcel.
4. Select whether to display documents for the current parcel (**From Current Parcel Only**), or for the current parcel and its parents, grandparents, or other ancestors (**From Current Parcel or Its History**).
5. Click the link to any document to view details.

## Copying or Moving a Document

When you split or merge a parcel, you may need to adjust the parcel-attachment relationship. To help you accomplish this task, Civic Platform enables you to copy or to move attachments between genealogically related parcels.

### To copy or move a document

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the Document tab.  
Civic Platform displays the Document tab for the parcel.
4. Select the documents that you want to copy or move.

5. Click **Copy** to copy the documents to a genealogically related parcel.

Click **Move** to move the documents to a genealogically related parcel.

Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.

6. Select the parcel that you want to copy or move the documents to.

7. Click **Submit**.

If you are copying, Civic Platform attaches the selected document to the newly selected parcel while retaining the association between the document and the original parcel.

If you are moving, Civic Platform attaches the selected documents to the newly selected parcel and removes the documents from the original parcel.

## Downloading and Printing Multiple Documents

To download multiple documents, choose the documents and click **Manage Documents > Download**. Note that the Civic Platform administrator must grant Upload and Download permission on the Administration > Agency Profile > Security Policy > EDMS Access Security > {EDMS-Name} to enable multiple document downloads.

To print multiple documents, choose the documents and click **Manage Documents > Print**. Note that the **Print** option only shows if the Civic Platform administrator has configured FID 8508 Print Multiple Documents with Full Access.

## Working with Associated Inspection Districts

After you have created parcel records, you can use the District tab for the parcel to manage the associated inspection districts. Based on your agency's user group settings, you may or may not have access to all the features described in this section. Contact your agency administrator for more information.

### Topics

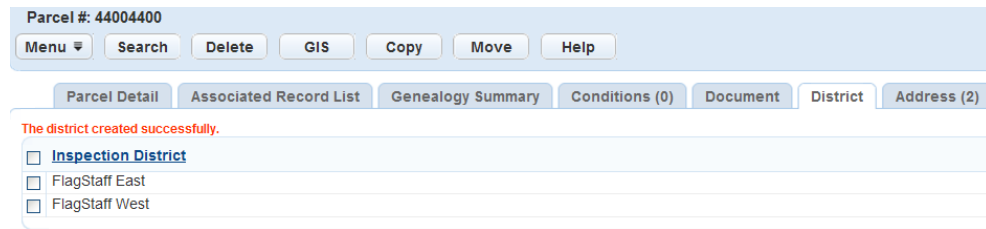
- [Associating an Inspection District with a Parcel](#)
- [Copying or Moving an Inspection District](#)

## Associating an Inspection District with a Parcel

Users can associate the parcels with inspection districts, which enables inspectors, for example, to organize inspections within a designated area.

### To associate a district with a parcel

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the District tab.  
Civic Platform displays the District tab for the selected parcel.
4. Locate the inspection district you want to associate. You can either search for the district using the standard search functionality, or you can use GIS to locate the district.
  - If you are using standard search, click **Search**, select the district you want to associate, and then click **Submit**.  
Civic Platform adds the selected district to the District tab for the parcel.



- If you are using GIS to locate districts, click **GIS**.  
Accela GIS opens.

1. Select the district layer in the Layers panel to activate it.



2. Use the map search panel to locate the inspection district you want, then select that district. You can also use the map selection tools to select an inspection district on the map.
3. From the **Actions** or **Context** menu, select **Send GIS Features**.  
Civic Platform adds the selected district to the District tab for the parcel.

## Copying or Moving an Inspection District

When you split or merge a parcel, you may need to adjust the parcel area of inspection districts. To help you do this, Civic Platform enables you to copy or to move inspection districts between two genealogically related parcels.

### To copy or move an inspection district

1. Navigate to the Parcels portlet.
2. Locate the parcel you want to work with, and click the link in the Parcel # column.  
Civic Platform displays the parcel details.
3. Click the District tab.  
Civic Platform displays the District tab for the parcel.
4. Select the inspection district that you want to copy or move.
5. Click **Copy** to copy the inspection district to a genealogically related parcel.  
Click **Move** to move the inspection district to a genealogically related parcel.  
Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.
6. Select the parcel that you want to move the inspection district to.

## 7. Click **Submit**.

If you are copying, Civic Platform attaches the selected inspection district to the newly selected parcel while retaining the association between the inspection district and the original parcel.

If you are moving, Civic Platform attaches the selected inspection district to the newly selected parcel and removes the inspection district from the original parcel.

## Working with Reference Data

After you create parcel records, you can associate reference data to them, view reference data, copy/move reference data between two genealogically related parcels, and remove associated reference data from parcels as needed. Reference data includes addresses, owners, structures and establishments.

Based on your agency's user group settings, you may or may not have access to all the features described in this section. Contact your agency administrator for more information.

### Topics

- [Associating a Reference Address to a Parcel](#)
- [Copying or Moving Reference Data](#)

## Associating a Reference Address to a Parcel

You can track relationships between reference parcels and reference records of other types by associating the reference records to parcels.

### To associate an address with a parcel

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Address tab.  
Civic Platform displays the Address tab for the selected parcel.
4. Locate the address you want to associate. You can enter an address manually, you can search for an address using the standard search functionality, or you can use GIS to locate an address.
  - If you are entering an address manually:
    1. Click **New**.  
Civic Platform displays the Address detail portlet.
    2. Complete fields with available data. For a description of the fields, see [Address Fields](#).
    3. Click **Submit**.  
Civic Platform adds the address to the parcel.
  - If you are searching for an existing address:
    1. Click **Look Up**.  
Civic Platform displays the Address search portlet.
    2. Enter search criteria as needed to locate the address you want.
    3. Click **Submit**.  
Civic Platform returns a list of addresses that match your search criteria.

4. Select the address that you want to associate to the parcel.
  5. Click **Select**.  
Civic Platform adds the address to the parcel.
- If you are using GIS to search for an address:
    1. Click **GIS**.  
Accela GIS opens.
    2. Select a layer in the Layers panel to activate it.



3. Use the map search panel to locate the address you want, then select that address. You can also use the map selection tools or the Geocoding Address Locator to locate an address on the map.
4. From the **Actions** or **Context** menu, select **Send Address**.  
Civic Platform adds the address to the parcel.

## Associating a Reference Owner to a Parcel

You can track relationships between reference parcels and reference records of other types by associating the reference records to parcels.

### To associate an owner with a parcel

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Owner tab.  
Civic Platform displays the Owner tab for the selected parcel.
4. Click **Look Up**.  
Civic Platform displays the Owner search portlet.
5. Enter search criteria as needed to locate the owner you want to associate.
6. Click **Submit**.  
Civic Platform displays a list of owners that match your search criteria.
7. Select the owner you want to add to the parcel.
8. Click **Select**.

Civic Platform adds the owner to the parcel.

## Associating a Reference Structure or Establishment to a Parcel

You can track relationships between reference parcels and reference records of other types by associating the reference records to parcels.

### To associate a structure or establishment with a parcel

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Structures & Establishments tab.  
Civic Platform displays the Structures & Establishments tab for the selected parcel.
4. Click **Look Up**.  
Civic Platform displays the Structure or Establishment search portlet.
5. Enter search criteria as needed to locate the structure or establishment you want to associate.
6. Click **Submit**.  
Civic Platform returns a list of structures or establishments that match your search criteria.
7. Select the structure or establishment you want to associate to the parcel.
8. Click **Select**.  
Civic Platform adds the structure or establishment to the parcel.

## Copying or Moving Reference Data

When you split or merge a parcel, you may need to maintain associated reference data. To help you do this, Civic Platform enables you to copy or move associated reference data between genealogically related parcels.

### To copy or move an associated reference object

1. Navigate to the Parcels portlet and use search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the tab containing the reference data you want to work with.  
Civic Platform displays the corresponding reference record tab for the selected parcel.
4. Select the reference object (such as an address or structure) that you want to copy or move.
5. Click **Copy** to copy the reference object to a genealogically related parcel.  
Click **Move** to move the reference object to a genealogically related parcel.  
Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.
6. Select the parcel that you want to copy or move the reference object to.
7. Click **Submit**.

If you are copying, Civic Platform associates the selected reference object to the newly selected parcel while retaining the association between the reference object and the original parcel.

If you are moving, Civic Platform associates the selected reference object to the newly selected parcel and removes the reference object from the original parcel.

## Working with Parcel Activities

After you have created parcel records, you can use the Activity tab to manage the activities associated with the parcel. From the Activity tab, you can create activities for parcels, view or update associated activities, copy or to move activities between two genealogically related parcels, and disassociate activities from parcels. For detailed instructions about how to work with activities for parcels, see [Activities](#).

## Associating a Public User with a Parcel

After you have created parcel records, you can use the Associated Public User tab to associate one or more public users to a parcel. This linked relationship is particularly useful when the public user initiates an application in Citizen Access. He or she can use the auto-fill feature to populate parcel details on the application intake form with one click. For more information about public users, contact your agency administrator.

### To associate a public user with a parcel

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Associated Public User tab.  
Civic Platform displays the Associated Public User list portlet.
4. Click **Look Up**.  
Civic Platform displays the Associated Public User search portlet.
5. Enter search criteria as needed and click **Submit**.  
Civic Platform returns a list of public users that meet the search criteria.
6. Choose the public user whom you want to associate with the parcel.
7. Click **Connect**.  
Civic Platform creates a link between the parcel and the public user.

## Working with Associated Trust Accounts

If there is an association between a parcel and one or more trust accounts, you can use the Associated Trust Accounts tab for the parcel to manage the associated trust accounts. Based on your agency's user group settings, you may or may not have access to all the features described in this section. Contact your agency administrator for more information.

### Topics

- [Viewing Associated Trust Accounts](#)
- [Copying or Moving Associated Trust Accounts](#)

## Viewing Associated Trust Accounts

You can view the trust accounts associated with a parcel.

### To view an associated trust account

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Associated Trust Accounts tab.  
Civic Platform displays the Associated Trust Accounts tab for the selected parcel.
4. Click the Account ID link of the trust account you want to view.  
Civic Platform displays the Trust Account detail portlet.

### Copying or Moving Associated Trust Accounts

When you split or merge a parcel, you may need to maintain parcel-trust account associations. To help you do this, Civic Platform enables you to copy or to move trust accounts between genealogically related parcels.

#### To copy or move an associated trust account

1. Navigate to the Parcels portlet and use Search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. Click the Associated Trust Accounts tab.  
Civic Platform displays the Associated Trust Accounts tab for the selected parcel.
4. Select the trust account that you want to copy or move.
5. Click **Copy** to copy the trust account to a genealogically related parcel.  
Click **Move** to move the trust account to a genealogically related parcel.  
Civic Platform displays a list of parcels, including the current parcel and its immediate parents, siblings, and children.
6. Select the parcel that you want to copy or move the trust account to.
7. Click **Submit**.  
If you are copying, Civic Platform associates the selected trust account to the newly selected parcel while retaining the association between the trust account and the original parcel.  
If you are moving, Civic Platform associates the selected trust account to the newly selected parcel and removes the trust account from the original parcel.

### Establishing a Parcel Genealogy

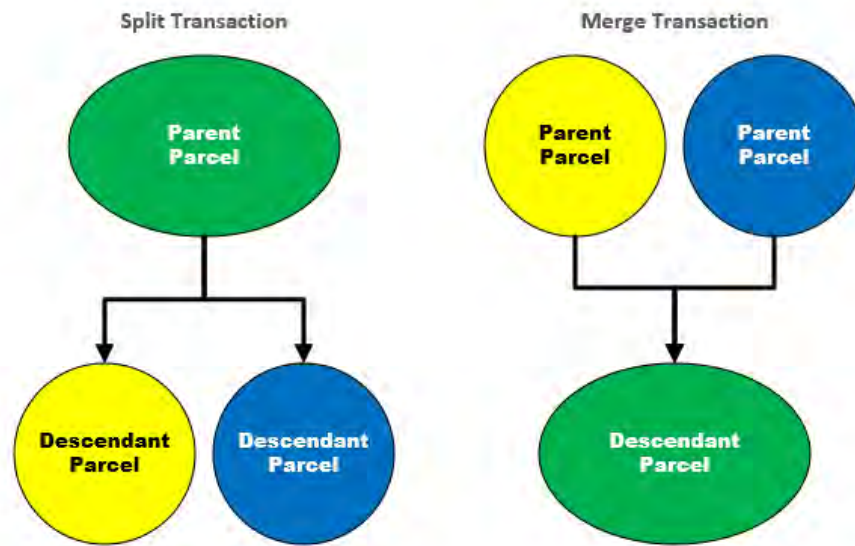
A parcel genealogy is a record of historical parcels and any applications associated with those parcels. You can use the parcel genealogy to track the evolution of any parcel in the genealogy.

To build a parcel genealogy, you need to establish a relationship between existing parcels. There are several types of relationships that you can establish. For example, you can split a parent parcel into multiple descendants. You can also merge parcels together in a “spousal” relationship, or choose to combine multiple parcels into a single descendant. Each time you establish a relationship between parcels, Civic Platform records your action as a genealogical transaction.

The two main types of genealogical transactions that you can perform are merges and splits. The illustration below shows examples of genealogy transactions. A split transaction allows you to disable



a single parent parcel so you can create one or more child parcels. A merge transaction allows you to disable two or more parent parcels so you can create a single descendent, or child parcel.



**Figure 20: Parcel Genealogy Transactions**



**Note:**

Genealogy transactions are not reversible. After a parcel genealogy transaction, parent parcels become disabled. Only the descendants of the transaction remain active. You cannot search for or add disabled parcels to an application or future genealogy transaction.

---

Each parcel in a parcel genealogy has a unique parcel number that identifies it. When splitting or merging parcels, you have the option of creating new parcel numbers for child parcels or applying the parcel number of a parent parcel to its child.

As soon as you perform a transaction, all parent parcels involved in the transaction become disabled. The transaction might generate new parcel records or just update the parent parcel to the child parcel. If you choose to update the parent parcel to the child parcel, you have the option of retaining a read-only copy of the parent parcel in the reference database.

---



**Note:**

Each parent and descendant parcel has a unique parcel number, and each parcel may have an association with one or more applications. Parcel genealogy transactions do not affect existing applications. When you create new applications, you can search for or add only parcels that a user has not disabled through a genealogy transaction.

---

## Topics

- [Splitting a Parcel](#)
- [Merging Parcels](#)
- [Viewing a Parcel Genealogy](#)

## Splitting a Parcel

Multiple children in a parcel genealogy imply a split. After you split a parcel, Civic Platform disables the original parcel.

When you select an active parcel from the Parcel list portlet or when you navigate to the Genealogy Summary tab for an active parcel, you can click **Split** to launch the Split Parcel wizard.

### To split a parcel

1. Either navigate to the Genealogy Summary tab for the parcel, or select the parcel that you want to split from the Parcels portlet.

2. Click **Split**.

Civic Platform launches the Split Parcel wizard.

3. Complete one of these options.

- To generate new child parcel numbers automatically:

1. Select the **Auto-generate Child Parcel IDs** option.

2. Complete the following fields.

**Number of Child Parcels** Enter the number of child parcels that you want to create.

**Common Starting Digits** Enter the common digits that each child parcel number is to begin with.

**Ending Digits to Increment From** Enter the remaining digits for the first child parcel number. The parcel number for the subsequent child parcel increments by 1 based on the parcel number of the previous child record.

- To enter child parcel numbers manually:

1. Select the **Manually Enter Child Parcel IDs** option.

2. Enter a parcel number in the Parcel ID field for each child parcels.

By default, Civic Platform lists only two child parcels. Click the **Add** link to add more child parcels. You can remove the third child parcel or any subsequent ones by clicking the **Delete** link next to the parcel.

If you want to use the parent parcel as a child parcel of the split, click the **Use Parent Parcel as a Child** link. Civic Platform populates the parent parcel number into the Parcel ID field of the first child automatically.

4. Click **Next**.

You move to the next step of the Split Parcel wizard.

**Manage Child Parcel Data**

Every child will by default inherit all field definitions of the parent parcel, but no items on the parent parcel will be associated with any child parcel by default. To change the field definitions or the associations on a child parcel, select the child parcel and then access the links below to make your change.

Select a Child Parcel \* All Child Parcels

Reset All To --Select--

	Reference Address	Street #	Direction	Street Name	Street Type
Address	924597385	7		MISSION	ST
Owner	924597443	4400		CROCKER	AVE
Structures	924597382	4		LARKIN	ST

Address

Owner

Structures

Establishment

District

Activity

Records

Conditions

Document

Trust Accounts

Next Back

https://av.ist.accela.com/portlets/commons/parcel/establishGenealogyFrame.jsp?module=Building&action=Split&from=REFPARCELGENE Local intranet

5. Select which child parcel you want to edit from the **Select a Child Parcel** drop-down list.

6. Complete the fields with available data. See [Parcel List Portlet Fields](#) for field definitions.



**Note:**

If you select the All Child Parcels option from the Select a Child Parcel drop-down list, the Parcel Details tab is not available. The parcel details copy from the parent parcel to all child parcels automatically.

7. Click each object tab on the left to manage available objects.

The Split Parcel wizard displays objects associated with the parent parcel.

Split Parcel 44004400 -- Webpage Dialog

Cancel Help

### Manage Child Parcel Data

Every child will by default inherit all field definitions of the parent parcel, but no items on the parent parcel will be associated with any child parcel by default. To change the field definitions or the associations on a child parcel, select the child parcel and then access the links below to make your change.

Select a Child Parcel \* All Child Parcels

Reset All To --Select--

	Reference Address ID	Street #	Direction	Street Name	Street Type
Owner	No Action 924597385	7		MISSION	ST
Structures	No Action 924597443	4400		CROCKER	AVE
Structures	No Action 924597382	4		LARKIN	ST

Address

Owner

Structures

Establishment

District

Activity

Records

Conditions

Document

Trust Accounts

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https://av.ist.accela.com/portlets/commons/parcel/establishGenealogyFrame.jsp?module=Building&action=Split&from=REFPARCELGENE Local intranet

8. Use the drop-down list next to each associated object to determine your action for that object - either No Action, Copy, or Move.

To control all the associated objects on a single tab at a time, use the **Reset All To** drop-down list.



**Note:**

By default, all associated objects copy from the parent parcel to the child parcel using the parent parcel number. For any other child parcel, only associated trust accounts copy by default.

9. To restart the application workflow on child parcels, select the **Restart Workflow** option in the Records tab.

10. Click **Next**.

You move on to the Split Summary page.

**Split Summary**

Parent Parcel: 44004400

Description: [Empty text box]

Date: 02/04/2013

Child Parcels

Number	Parcel ID
1	123440
2	123441

[View details](#)  
[View details](#)

Finish Back

https://av.ist.accela.com/portlets/commons/parcel/establishGenealogyFrame.jsp?module=Building&action=Split&from=REFPARCELGENE Local intranet

11. Complete these fields on the Split Summary page.

- Retain Parent Parcel Data** Select this option to retain the parent parcel as a read-only reference record. It is no longer associated with the objects that you just moved to one or more child parcels. When you do not select this option, Civic Platform updates the parent parcel directly as the child parcel using the parent parcel number. This option is available only when a child parcel uses the parent parcel number.
- Description** A description with details about the split.
- Date** The date when the split occurred.

12. If you want to view a child parcel, click the **View details** link next to the child parcel from the Child Parcels list.

Civic Platform displays the Parcel Summary window for the selected parcel. The Parcel Summary window contains the parcel details, as well as a list of the objects associated with the parcel.

13. Click **Finish**.

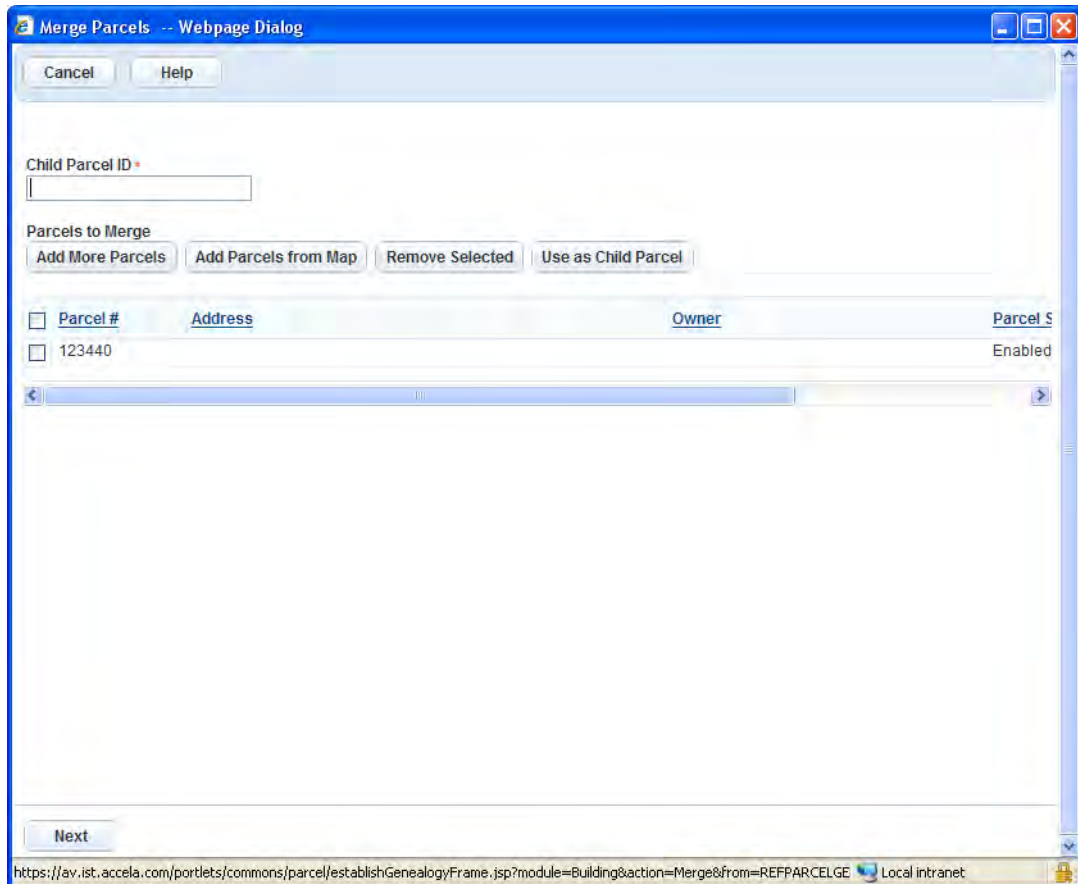
Civic Platform splits the parcel as you specified and establishes a parcel genealogy transaction. If you chose to retain parent parcel data, Civic Platform returns to the Genealogy Summary tab for the parent parcel. Otherwise, Civic Platform returns to the Genealogy Summary tab for the child parcel using the parent parcel number.

## Merging Parcels

Multiple parents in a parcel genealogy imply a merge. After you merge parcels, Civic Platform disables the original parcels.

### To merge parcels

1. Either navigate to the Genealogy Summary tab for the parcel, or select the parcel that you want to merge from the Parcels portlet.
2. Click **Merge**.  
Civic Platform launches the Merge Parcel wizard.



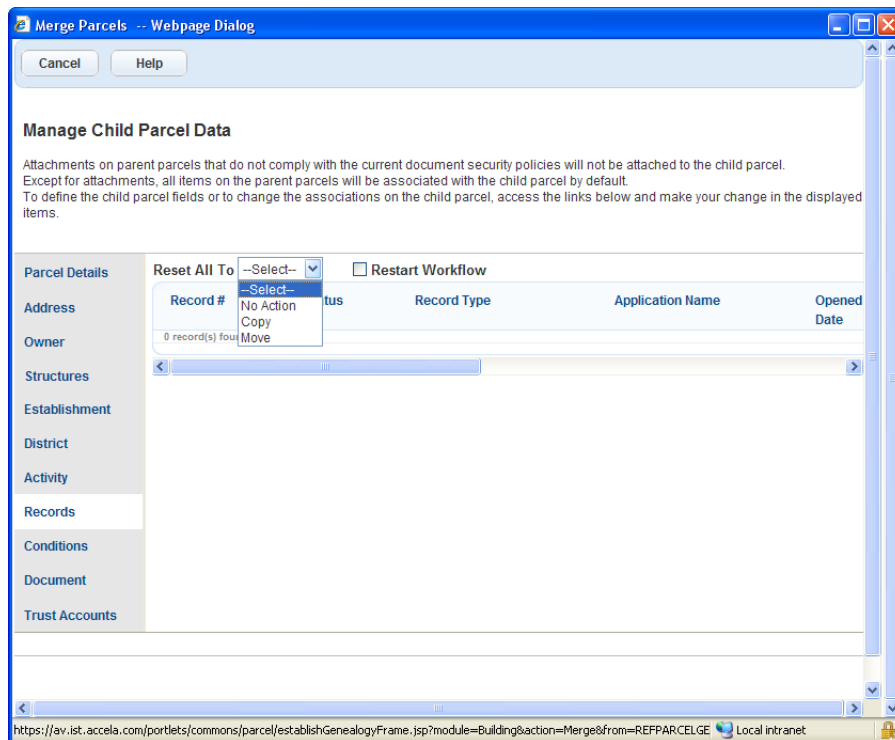
3. You can select parcels to merge in more than one way.
  - To add parent parcels from a list:
    1. Click **Add More Parcels**.  
Civic Platform displays a search window.
    2. Enter search criteria as needed and click **Submit**.  
A list of parcels matching your search criteria displays.
    3. Select the parcels that you want and click **Select**.  
Civic Platform adds the selected parcel to the Parcels to Merge list.
    4. Repeat steps a through d for each additional parent parcel that you want to include in the merge.
  - To add parent parcels from the map:
    1. Click **Add Parcels from Map**.  
Accela GIS opens and activates the parcel layer.
    2. Search for a parcel using the map Search panel and select one or more parcels to include in the merge.

3. From the **Actions** or Context menu, select **Send GIS Features**.  
Civic Platform adds the selected parcel to the Parcels to Merge list.
4. Repeat steps a through d for each additional parent parcel that you want to include in the merge.
4. Enter the child parcel number in the **Child Parcel ID** field.  
If you want to use a parent parcel as the child parcel of the merge, select the parent parcel and then click **Use as Child Parcel**.
5. Click **Next**.  
The Manage Child Parcel Data page displays.
6. Complete the fields with available data. See [Parcel List Portlet Fields](#) for field definitions.

**Note:**

If the child parcel uses the parcel number of a parent parcel, then parcel details automatically copy from the parent parcel. Otherwise, you must manually enter parcel details.

7. Click each object tab on the left to manage available objects.  
The Merge Parcel wizard displays objects associated with the parent parcels.

**Note:**

If an object has an association with multiple parent parcels, the object list only displays a single record for the object.

8. Use the drop-down list next to each associated object to determine your action for that object. Options include No Action, Copy, or Move.

**Note:**

If a child parcel uses the parcel number of a parent parcel, all objects associated with the parent parcel copy to the child parcel by default. For objects associated with the other parent parcels, you must select an action for each one individually.

9. If you want to restart the application workflow on child parcels, select the **Restart Workflow** option in the Records tab.

10. Click **Next**.

The Merge Summary page displays.

11. Complete these fields.

<b>Retain Parent Parcel Data</b>	Available when a child parcel uses the parent parcel number, this option defines whether or not to retain the parent parcel as a read-only reference record. If the option is enabled, the parcel no longer has an association with the objects that moved to child parcels. If disabled, the parent parcel is directly updated as the child parcel using the parent parcel number.
<b>Description</b>	A description with details about the merge.
<b>Date</b>	The date when the merge occurred.

12. To view a child parcel, click **View details**.

Civic Platform displays the Parcel Summary window for the child parcel.

13. Click **Finish**.

Civic Platform merges the parcels as specified and establishes a parcel genealogy transaction. If you chose to retain parent parcel data, Civic Platform returns to the Genealogy Summary tab for the parent parcel that Civic Platform uses as the child parcel in the merge. Otherwise, Civic Platform returns to the Genealogy Summary tab for the child parcel.

## Viewing a Parcel Genealogy

After you establish a parcel genealogy, you can review it from the perspective of any parcel involved in the genealogy. From the perspective of this reference parcel, each genealogy shows two sections of transactions: History and Children.

The History section shows you any transactions from which the selected parcel descends, including the parents, grandparents, and even ancestors of the parcel. The transactions display in descending chronological order, which means the latest transaction always displays at the top of the History section.

The Children section only shows you any transactions for which the selected parcel is the parent. This section only includes one generation of descendants. In addition to parents, grandparents, ancestors, and children, you can interact with siblings and spouses of a selected parcel. Siblings are co-descendants of the same parents. Spouses are co-partners in a merger. Siblings and/or spouses are visible in both the History and Children sections.

If the selected parcel is active, then you may be able to split the parcel or merge it with other parcels through the Genealogy Summary page. Based on your agency's user group settings, you may or may not have access to the Merge and Split buttons on the Genealogy Summary page. Contact your agency administrator for more information.

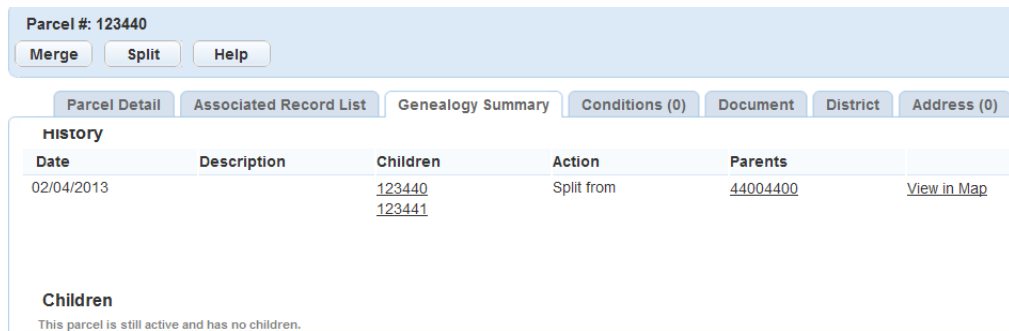
### To view a parcel genealogy

1. Navigate to the Parcels portlet and use search to locate the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.



- Click the Genealogy Summary tab.

Civic Platform displays the Genealogy Summary page.



Parcel #: 123440

Merge Split Help

Parcel Detail Associated Record List **Genealogy Summary** Conditions (0) Document District Address (0)

**HISTORY**

Date	Description	Children	Action	Parents	
02/04/2013		<a href="#">123440</a> <a href="#">123441</a>	Split from	<a href="#">44004400</a>	<a href="#">View in Map</a>

**Children**

This parcel is still active and has no children.

- Click the link to any parcel in the genealogy.  
Civic Platform displays the genealogy summary for the selected parcel.
- To view the parcels involved on the map, click the **View in Map** link.  
Civic Platform displays the GIS map viewer.

## Working with External APO Data

External address, parcel and owner (APO) data refer to the APO data from external data source. Your system administrator can configure Civic Platform in a way that allows you to view records associated with external parcels data. You can also run reports for associated records. For information on running reports, see [Accessing and Running a Report via a List Portlet](#).

If your agency administrator configure a GIS map layer as external parcel source, you can retrieve GIS objects from the map layer as external parcels, and attach the external parcels to records.

### To work with external APO data

- Navigate to the Parcels portlet and click **GIS**.
- Complete any fields that display. For a description of the fields, see [Parcel List Portlet Fields](#).
- Click the Parcel # column for the parcel you want to work with.  
Civic Platform displays the parcel details.
- (For external parcels from GIS source) Hover your mouse cursor on **GIS**, and then select **Show/Select GIS Objects**.  
Civic Platform launches the GIS map viewer.  
Different from other external parcels, external parcels from the GIS source can support the same commands as those available for internal parcels in the GIS map viewer, including Show Accela Record, Send Features, and Create New Record. For information on working with parcels in the GIS map viewer, see [Accela GIS User Guide](#).
- Click the Associated Record List tab.  
Civic Platform displays the records associated with the selected external parcel information.
- Click the Document tab. You can attach documents to the external parcel as needed.

## Viewing Parcels in GIS

Use GIS functionality to locate parcels. GIS provides automated maps from a central database and gives staff direct access to view geographic representations of a parcel.

### To view a parcel in GIS

1. Navigate to the Parcels portlet and use **Search** to identify a parcel you want to work with.  
Civic Platform displays a list of parcels.
2. Select the parcel you want to view in GIS.
3. Click **GIS**.

## Managing Owners

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Civic Platform stores property owner information in the database. A property owner is any person, company, or organization that owns the parcel associated with an application. An application can have multiple property owners associations.

Depending on your privileges, you may be able to create new reference owner, and modify existing owner records in the database. However, you cannot delete owners from the database. Instead, you can disable owner records, which prevents users from associating those owners with new applications, while preserving any existing association with applications.

### Topics

- [Adding a Reference Owner](#)
- [Finding a Reference Owner](#)
- [Associating an Owner to an Application](#)
- [Adding an Owner to a Parcel](#)
- [Removing an Owner Associated to a Parcel](#)
- [Associating or Disassociating a Public User with an Owner](#)

### Adding a Reference Owner

You can add new owners to your reference database. After you add a reference owner, you can look up the owner when associating owners with a specific application.

#### To add a reference owner

1. Navigate to the Owner portlet and use search to locate the owner you want to work with.
2. Click the link in the Name column for the target owner.  
Civic Platform displays the owner details.
3. Complete the fields with available data. See [Owner List Portlet Fields](#) for field definitions.
4. Click **Submit**.

### Finding a Reference Owner

#### To search for a reference owner

1. Navigate to the Owner portlet and click Search.
2. Complete the fields with available data. See [Owner List Portlet Fields](#) for field definitions.



#### Note:

According to your agency's settings and the form layout, there may be template fields in addition to the standard fields listed in [Owner List Portlet Fields](#). The additional fields are active attributes defined in the address template in Civic Platform.

---

3. Click the link in the Name column for the target owner.  
Civic Platform displays the owner details.
4. To view a list of applications associated with the owner, click the Record Detail tab.

## Associating an Owner to an Application

Each application can have one or more owners associated with it. You can manually add a new owner to an application. You can also select an existing owner from your reference database.

### Topics

- [Adding a New Owner to an Application](#)
- [Adding an Owner from a Reference Database](#)
- [Viewing Applications Associated with an Owner](#)
- [Editing an Owner Associated to a Record](#)
- [Removing an Owner from an Application](#)

## Adding a New Owner to an Application

Civic Platform does not store new owners that you add to an application in your reference database. To add a new owner to your reference database, see [Adding a Reference Owner](#).

### To add an owner to a building application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.
3. Click the Owners tab.
4. Click **New**.
5. Complete the fields with available data. See [Owner List Portlet Fields](#) for field definitions.
6. Click **Submit**.

## Adding an Owner from a Reference Database

You can add an owner to an application by searching for an existing owner in your reference database.

### To add an owner to an application

1. Navigate to the portlet you are working in, and use search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.
3. Click the Owners tab.
4. Click **Look Up** and enter search criteria as appropriate to find the owner you want to add.
5. Click **Submit**.  
Civic Platform displays your search results.
6. Choose one or more owners, then click **Select**.  
If the selected owner(s) have associated addresses, parcels, structures, or establishments, the associated data may auto-populate to the relevant fields or it may display in a selection form, depending on how your agency configured the process.  
If there are no associated objects, you can add them manually.

7. If an associated data list displays, select the data you want to add to the application, then click **Select**.  
The owner and any associated reference data that you selected populate to the application.
8. Click **Submit**.  
The owner and any associated reference data that you selected populate to the application.

## Viewing Applications Associated with an Owner

After you look up a reference owner, you can view a list of associated applications for the owner.

### To view applications associated with a reference owner

1. Locate and select the owner you want to work with. See [Finding a Reference Owner](#) for more information.
2. Click the Record List tab.  
Civic Platform displays a list of applications associated with the owner.
3. To view or update application details, click the link to the application that you want to view.

## Editing an Owner Associated to a Record

After you add an owner to a record, you can edit the owner details as needed to correct mistakes or complete partial information.



### Note:

When you edit owner data on a record, your changes do not replicate to the owner record in your reference database, nor do they replicate to any other records with the same owner. Your changes only affect the current record.

---

### To edit owner data on an application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.
3. Click the Owners tab.  
Civic Platform displays a list of owners associated with the application.
4. In the **Name** column, click the link to the owner that you want to edit.  
Civic Platform displays the details on the tabs.
5. Modify owner information as needed.
6. Click **Submit** to save your changes.

## Removing an Owner from an Application

You can remove an owner from an application as needed. Removal of an owner from an application does not delete the owner record from your reference database, nor does it affect other applications associated with the same owner.

### To delete a owner from an application

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with.  
See [Using the Search Features](#) for information about searching.

2. Click the link in the Record ID column for the record you want.
3. Click the Owners tab.  
Civic Platform displays a list of owners associated with the application.
4. Select each owner you want to delete.
5. Click **Delete**.  
If the selected owner has any associated address, parcel, structure, or establishment records you may be prompted to select the data you want to remove.
6. Select which data you want to remove from the record and then click **Select**.  
Civic Platform removes the parcel and any associated reference data you selected from the record.  
Civic Platform updates the owner list.

## Adding an Owner to a Parcel

You can associate one or more owners with a parcel record. After an owner-parcel association occurs, if you populate or delete the information from one, the associated information populates or is removed from the record automatically or following a prompt. For example, if you delete parcel information from a record, Civic Platform also removes the associated owner information. This is controlled by your agency's settings, so contact your agency administrator with questions about synchronizing reference data.

### To associate an owner to a parcel

1. Navigate to the Parcel portlet and use Search to locate and select the parcel you want to work with.
2. Click the link in the Parcel # column for the target parcel.  
Civic Platform displays the parcel details.
3. In the parcel detail form portlet, click the Owner tab.  
Civic Platform displays a list of owners associated with the parcel.

Parcel #: 44004400						
<input type="button" value="Menu"/> <input type="button" value="Look Up"/> <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Move"/> <input type="button" value="Help"/>						
<input type="button" value="Parcel Detail"/> <input type="button" value="Associated Record List"/> <input type="button" value="Genealogy Summary"/> <input type="button" value="Conditions (0)"/> <input type="button" value="Document"/> <input type="button" value="District"/> <input type="button" value="Address (2)"/> <input type="button" value="Owner (1)"/>						
<input type="checkbox"/>	Owner Name	Address	City	State	Zip	Primary
<input type="checkbox"/>	CAMILLE LE-BLANC BAZINET	4400 KETTLEBELL LANE A...	BURLINGAME	CA	94560	Y

4. Click **New**.
5. Enter an owner manually or locate an owner from the reference database:
  - To enter an owner manually, complete the Owner fields with available data, then click **Submit**. See [Owner List Portlet Fields](#) for field descriptions.
  - To select an owner from the database, click **Look Up** and enter search criteria to find the desired owner, then click **Submit**. Select the owner(s) you want to associate and click **Select**.  
Civic Platform confirms the owner-parcel association

## Removing an Owner Associated to a Parcel

You can remove any owner associated to a parcel. When you do this, Civic Platform does not delete the owner record from the reference database. Only the association is removed.

### To disassociate an owner from a parcel

1. Navigate to the Owner portlet and use search to locate and select the owner you want to work with.  
Civic Platform displays the owner details.
2. In the owner detail form portlet, click the Parcel tab.  
Civic Platform displays a list of owners associated to the parcel.
3. Select each owner you want to disassociate from the parcel and click **Delete**.  
Civic Platform confirms the removal of the associated owner from the parcel.

### **Associating or Disassociating a Public User with an Owner**

You can associate or disassociate owners and public users with one another at any time. This linked relationship is particularly useful when you want a public user to be able to view comments or view document attachments associated with a record using Citizen Access. For more information about public users, refer to Chapter 21, Public Users, in the *Accela Civic Platform Administrator Guide*.

#### **To associate a public user with an owner**

1. Navigate to the Owner portlet and use search to locate and select the owner you want to work with.  
Civic Platform displays the owner details.
2. Click the Associated Public User tab.  
Civic Platform displays the Associated Public User list portlet.
3. Use search to locate the Public User you want to associate the current owner with.  
Civic Platform returns a list of public users that meet the search criteria.
4. Select each public user you want to associate with this owner.
5. Click **Connect**.  
Civic Platform creates a link between the owner and the public user.

#### **To disassociate a public user with an owner**

1. Follow steps 1-3 to associate a public user with an owner.
2. Select each public user you want to remove
3. Click **Delete**.

## Managing Section, Township, and Range

Some areas of land are surveyed using the rectangular-survey system, otherwise known as the township-range system. Two lines run at right angles to each other through the territory—a base line running east and west and a meridian line running north and south. The land then divides into sections from the point of this intersection as follows:

**Township.** Townships measure approximately six miles on a side, making thirty-six square miles. Each township is divided into 36 sections, each section being 1 square mile. The sections within the township are numbered starting with the Northeast corner of the township. Numbers entered for township represent the measure of units North or South of the base line.

**Range.** Represents the measure of units east and west of the base line.

For example, Township 3 North, Range 9 West, 5th Principal Meridian identifies a specific township that is 3 tiers north from the base line and 9 tiers west (Range) of the 5th Principal Meridian.

**Section Number.** A piece of a township measuring 640 acres, one square mile, numbered with reference to the base line and meridian line.

### Topics

- [Adding Township Range Information](#)
- [Deleting Township Range Information](#)

### Adding Township Range Information

You can add section, township, and range information to an application.

#### To add township range information

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want.
3. Click the Section Township Range tab.  
Civic Platform displays the Section Township Range page.
4. Click **Add**.  
Civic Platform displays the Section Township Range—Add page.

Application:    
 Address: 100 - N MAIN ST, PLEASANTVILLE, CA 97777  
 Owner Name:  
 Owner Address:  
 Type: [Building](#) / [Commercial](#) / [New](#) / [NA](#)  
 Application Name: [Application Name](#)

**Section Township Range**

Section \* :

Township \* :

Range \* :

PLSS Type:

PLSS Lot Number:

5. Complete the fields with available data. For a description of the fields, see [Section, Township, and Range List Portlet Fields](#).



6. Click **Save**.

## Deleting Township Range Information

1. Navigate to the portlet you are working in, and use Search to locate the record you want to work with. See [Using the Search Features](#) for information about searching.
2. Click the link in the Record ID column for the record you want. Civic Platform displays the application details.
3. Click the Section Township Range tab. Civic Platform displays the Section Township Range page.
4. Click **Delete**. Civic Platform displays a pop-up window requesting confirmation.
5. Click **OK**. Civic Platform removes the record from the application.

## Examining Property-Related Portlets

The following tables list and define the fields that may be available in the forms and portlets you see when working with Properties.

- [Address Fields](#)
- [Parcel List Portlet Fields](#)
- [Owner List Portlet Fields](#)
- [Section, Township, and Range List Portlet Fields](#)

### Address Fields

The following table lists (in alphabetical order) and defines the default fields available on the Address list portlet.

Table 51: Address Fields

<b>Address Description</b>	A description of the address.
<b>Address Status</b>	The current status of the address record. You cannot associate disabled addresses with a permit application. Use the drop-down list to search for either Disabled or Enabled addresses or both.
<b>Address Type</b>	Select the Address Type Code for the address from the drop-down list
<b>Audit Date</b>	The creation/modification date of the address.
<b>Audit ID</b>	The identification code of the person who created or modified the address.
<b>City</b>	The city where the address is.
<b>Country</b>	The country where the address is.
<b>Description</b>	A description of the address.
<b>Direction</b>	Use this drop-down list to indicate a street direction. For example, choose N to indicate a north direction. This usually indicates the directional area of a city or street, for example, North Broadway.
<b>Distance</b>	Enter a distance from another landmark used to locate the address.
<b>Event ID</b>	Any event scheduled for the address.
<b>Fraction</b>	In combination with the Street # field, this field indicates a fractional street number. If you are searching for an address, you can specify a range of fractional street numbers using the corresponding Start and End fields.
<b>House # Alpha (end)</b>	The ending street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street name/number is 10-23A WHITESTONE, then 23A is the ending street number.
<b>House # Alpha (start)</b>	The beginning street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street name/number is 10-23A WHITESTONE, then 10 is the beginning street number.
<b>Inspection District</b>	The inspection district within which the address resides.
<b>Inspection District Prefix</b>	The prefix for the inspection district within which the address resides.
<b>Level # (end)</b>	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-storey building/sub-complex.

<b>Level # (start)</b>	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-storey building/sub-complex.
<b>Level Prefix</b>	The prefix for the level numbers (floor numbers) that make up the address.
<b>Neighborhood</b>	The neighborhood within which the address resides.
<b>Neighborhood Prefix</b>	The prefix for the neighborhood within which the address resides.
<b>Prefix</b>	Any part of the address that should come before the street name/number, such as a direction. For example "north" in North Willow Drive.
<b>Primary</b>	Indicates whether the address is the primary residence or business location associated with an application. You can associate many addresses with an item, but only one address is the primary address. If you need to delete a primary address, change this field to No and delete.
<b>Secondary Road</b>	The road for the secondary address.
<b>Secondary Road Number</b>	The number of the address's secondary road.
<b>Source Flag</b>	The Accela application that stores this address information, such as Civic Platform, Kiva, or Tidemark.
<b>Source Number</b>	A number that identifies the Accela application that stores the address information.
<b>State</b>	The state where the address is.
<b>Street # (Start/End)</b>	The street number(s) of the address. If the address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Otherwise, you can specify a singular street number in either field. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.
<b>Street Name</b>	The street name for the address.
<b>Street Suffix (Type)</b>	Choose a type of street, such as Lane or Boulevard.
<b>Unit # (Number)</b>	The unit number, for example, apartment number. If you are searching for an address, you may be able to specify a range of unit numbers in the corresponding Start and End fields.
<b>Unit Type</b>	The type of structure for this address, for example, apartment or condo.
<b>Validated</b>	Indicates the validation status of an address against an external address source.
<b>X Coordinate</b>	If you use a GPS device, this is the longitudinal coordinate for this address.
<b>Y Coordinate</b>	If you use a GPS device, this is the latitudinal coordinate for this address.
<b>Zip</b>	The zip code where the address is.

## Parcel List Portlet Fields

The following table lists (in alphabetical order) and defines the default fields available on the Parcel list portlet.

Table 52: Parcel Detail

<b>Block</b>	The name, or street number, of the block associated with this application. A parcel may contain one or more blocks.
<b>Book</b>	This is a reference to the physical location of this parcel information in the County Assessor's, or other responsible department's records.
<b>Exemption Value</b>	Enter the total value of any tax exemptions that apply to the land within the parcel.
<b>Improved Value</b>	The total value of any improvements to the land within the parcel.

<b>Land Value</b>	The total value of the land within the parcel.
<b>Legal Description</b>	The legal description of the parcel, the parcel boundaries, or the characteristics. You may also include a reference to the official documents that contain this description.
<b>Lot</b>	The name, or boundaries, of the lot associated with the application.
<b>Page</b>	This is a reference to the physical location of this parcel information in the County Assessor's, or other responsible department's records.
<b>Parcel Area</b>	The total area of the parcel. Your agency determines the standard unit of measure (for example, square feet).
<b>Parcel Number</b>	The official parcel number determined by the county assessor or any other responsible department.
<b>Range</b>	A range number to download applications within that range number.
<b>Section</b>	The section number.
<b>Street Suffix (Direction)</b>	The street suffix which indicates the direction. For example, E, NE, and SW. This field is available in the reference parcel search portlet.
<b>Subdivision</b>	The subdivision associated to the application.
<b>Township</b>	The township number.
<b>Tract</b>	The name of the tract associated with this application. A tract may contain one or more related parcels; for example, three parcels with the same owner.

### Owner List Portlet Fields

The following table lists and defines the default fields available on the Owner list portlet.

Table 53: Owner Fields

<b>Address Line 1</b>	The first line of the owner's address.
<b>Address Line 2</b>	The second line of the owner's address.
<b>Address Line 3</b>	The third line of the owner's address.
<b>City</b>	The city where the address is.
<b>Fax</b>	Enter the owner's fax number.
<b>Name</b>	The name of the owner. This may be an individual person, business, or organization.
<b>Phone Number</b>	The owner's daytime telephone number.
<b>State</b>	The state where the address is.
<b>ZIP Code</b>	The zip code where the address is.

### Section, Township, and Range List Portlet Fields

The following table lists and defines the default fields available on the Section, Township, and Range list portlet.

Table 54: Section, Township, and Range Field Details

<b>Section</b>	The name of the section.
<b>Township</b>	The name of the township (usually identified on a north-south grid ).
<b>Range</b>	The range (usually identified on an east-west grid).
<b>PLSS Type</b>	The Public Land Survey System type.
<b>PLSS Lot Number</b>	The Public Land Survey System lot number, up to five digits.

## Random Audits

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Choose a topic from the list below to learn more about working with random audits.

### **Related Information**

[Random Audit Overview](#)

[Creating a Random Audit Set](#)

[Generating or Regenerating a Random Audit Set](#)

[Deleting a Random Audit Set](#)

[Viewing the Random Audit History](#)

[Executing a Script on an Audit Set](#)

[Running a Report on an Audit Set](#)

[Examining Random Audit Details](#)

## Random Audit Overview

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You can use parameters to designate a specific group of records (such as licenses) or inspections, and then generate a random audit set from within that group. Once you have generated an audit set, you can execute scripts, run reports, and filter the audit set.

### **USE CASE 1:**

Regulations require your agency to perform an audit of continuing education requirements for 45% of all pharmacist licensees. The Random Audit feature enables you to select a license type “Pharmacist” and then choose either a percentage or a quantity of Pharmacist licensees. Civic Platform then generates a random list of records for an audit. You can send a form letter to the audited licensees to inform them that they must complete and submit the original continuing education paperwork to renew their license. After you audit a licensee, Civic Platform makes a note in the file to exclude that licensee in the next audit.

### **USE CASE 2:**

Your agency has multiple inspectors whose job it is to inspect restaurants in the same region. To ensure that inspectors complete necessary inspections on a random basis rather than based on preferred territory, your agency can use the random audit feature to assign a random list of businesses to each inspector.

A record or an inspection can belong to multiple audit sets. Civic Platform does not exclude records or inspections with locked or hold conditions from audit sets.

## Creating a Random Audit Set

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When you define the parameters of a random audit set, you determine which records that Civic Platform can randomly choose from for the audit. You can use several factors to define which records go into an audit set, including record type, completed date, assigned to staff, and inspection district. You can also define how many items to include in the audit set, either as a specific number or as a percentage of the items that fall within your parameters.

You can define your audit parameters to ignore any audit frequency settings that the agency administrator defined. For example, if the agency administrator sets the audit frequency for the Licensing module to twelve months, you cannot audit a record in that module more than one time in any twelve-month period. When you create or edit an audit set, you can override the audit frequency settings for the record type by selecting Include Previously Audited Records.

### To create a random audit set

1. Navigate to the Sets portlet and click the Random Audit tab.  
Civic Platform displays the Random Audit list and detail portlet.
2. Hover the mouse cursor on the **New** button to display a command menu.
3. Select either **Record Audit** or **Inspection Audit**.  
Civic Platform displays the new random audit set form.
4. Complete the fields as required with available data. See [Random Audit Set Fields](#) for field definitions.
5. Click **Submit**.  
Civic Platform creates the set and adds it to the list of random audits. The set contains no records until you generate the audit set.  
To generate an audit set, see [Generating or Regenerating a Random Audit Set](#).

## Generating or Regenerating a Random Audit Set

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After you have defined the parameters for the audit set, you can generate the audit set. Civic Platform returns a list of randomly chosen records or inspections within the parameters of the audit set. You can now execute a script or run a report on this set of items.

If you have supervisor privileges, the Generate Audit button displays with the label 'Regenerate Audit' after initial set generation.

### To generate a random audit

1. Navigate to the Sets portlet and click the Random Audit tab.  
Civic Platform displays the random audits list and detail portlet.
2. Locate the random audit you want to generate. Click the link under the **Set ID** column for the random audit set you want to generate.  
Civic Platform displays the random audit set detail portlet.
3. Click the Set Member tab.
4. If you just created the set, click **Generate Audit** to create the audit set.  
If you already generated the set, a list of records displays in the Set Member tab.
5. If you want to update the audit set, click **Regenerate Audit**.  
Civic Platform returns a set of items chosen randomly according to the parameters defined for the audit set. The number of items in the set displays on the Set Member tab.



## Deleting a Random Audit Set

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If you no longer need to track the set of records or inspections defined by a random audit set, you can delete the set. After you delete an audit set, Civic Platform removes all of the data pertinent to the members from the Audit History tab. For more information about Audit History, see [Viewing the Random Audit History](#).

### To delete a random audit set

1. Navigate to the Sets portlet and click the Random Audit tab.  
Civic Platform displays the random audit list portlet and detail portlet.
2. Select the random audits you want to delete.
3. Click **Delete**.  
Civic Platform deletes the audit set.

## Viewing the Random Audit History

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Each time Civic Platform includes a record or an inspection in a random audit, Civic Platform stores information about that audit in the Random Audit History tab for each member included in the audit.

### **To access the random audit history from the record or the inspection**

- With the Record detail portlet open, navigate to the Random Audit History tab for the record.
- With the Inspection detail portlet open, navigate to the Random Audit History tab for the inspection.

### **To access the random audit history from the Set portlet**

1. Navigate to the Sets portlet and click the Random Audit tab.  
Civic Platform displays the Random Audit list and detail portlet.
2. Click the hyperlink for the audit set which includes the item of interest.
3. Click the Set Member tab.
4. Identify and click the item of interest.
5. Navigate to the Random Audit History tab for the item.

## Executing a Script on an Audit Set

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After you have a set of records or inspections that match your audit set parameters, you can execute scripts on the set of items.

**USE CASE:** You run a random audit on all inspections that external inspectors completed in the past month and you want to schedule a surprise inspection on each randomly-selected inspection. Your agency defines an EMSE script to generate surprise inspections based on the results of the random audit. The surprise inspection is a regular inspection in Civic Platform, and it is a child inspection of the audited inspection. If the surprise inspection type's setting "Display in ACA" is set to Yes, external inspectors can see the surprise inspection from the new inspection list in Citizen Access.



**Note:**

Your agency administrator must configure EMSE scripts that you can execute on an audit set. Contact your agency administrator with any questions about the scripts available for random audits.

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### To execute a script on an audit set

1. Locate the audit set for which you want to execute a script.
  - a. Navigate to the Sets portlet.
  - b. Click the Random Audit tab.
  - c. In the list of audit sets, click the link to the set you want under the **Set ID** column.  
Civic Platform displays the random audit set list portlet and detail portlet.
2. In either the Set or Set Member tab, hover over **Execute Script** to display a list of scripts.
3. Click the name of the script you want to execute.  
The script executes on the audit set.

## Running a Report on an Audit Set

After you have a set of records or inspections that match your audit set parameters, you can run reports on the set of records.



**Note:**

Your agency administrator must configure any report you want available to run on an audit set. Contact your agency administrator with any questions about the reports available for random audits.

### To run a report on an audit set

1. Locate the audit set for which you want to run a report.
  - a. Navigate to the Sets portlet.
  - b. Click the Random Audit tab.
  - c. In the list of audit sets, click the link to the set you want under the **Set ID** column.  
Civic Platform displays the random audit set list tab and detail tab.
2. In either the Set or Set Member tab, hover over the **Reports** button to display a list of available reports.
3. Click the name of the report you want to run.  
The report engine runs the report and downloads a copy to your machine. A pop-up window displays the Send Email button.
4. Click **Send Email** to send a copy of the report by email.  
Civic Platform displays a pop-up window to configure email settings.

Submit Cancel Help

Send report via e-mail to:

All set member Records' contacts

Other

(Separate multiple e-mail addresses with a semicolon.)

5. Select one or both of the options.

- |   |  |
|---|--|
| <b>All set member Records' contacts</b> | This sends the report via email to all contacts associated with each record in the audit set.  |
| <b>Other</b>                            | This sends the report via email to recipients you designate. Enter email addresses in the provided textbox. Separate email addresses with a semicolon. |

6. Click **Submit**.

## Examining Random Audit Details

The following table lists and defines the default fields available when working with random audits.

Table 55: Random Audit Set Fields

<b>Assign Date</b>	This date range limits returned records or inspections to those assigned within that range.
<b>Assigned to Department</b>	Filters returned records or inspections by department.
<b>Assigned to Staff</b>	Filters returned records or inspections by staff member.
<b>Audit Type</b>	This is a read-only field. This field indicates whether the audit set includes records or inspections.
<b>City</b>	Filters returned records or inspections by city.
<b>Closed Date</b>	This date range limits returned records or inspections to those assigned within that range.
<b>Comments</b>	Comments for the audit set.
<b>Completed Date</b>	This date range limits returned records or inspections to those completed within that range.
<b>District</b>	Filters returned records or inspections by district. This field is specific to inspection audit sets.
<b>Expiration Date</b>	This date range limits returned records or inspections to those expired within that range.
<b>Expiration Status</b>	Filters returned records or inspections by expiration status.
<b>External Inspector</b>	This filters returned inspections to include inspectors who have Civic Platform user accounts but cannot log in to Civic Platform. For example, contract inspectors and self-certified inspectors are external inspectors. This field is specific to inspection audit sets.
<b>Include Previously Audited Records Excluding the Last x Month(s)</b>	This option overrides any administrator-defined audit frequency settings at the record type, module, or agency level for a user-defined number of months.
<b>Inspection Date</b>	This date range limits returned inspections to those whose inspection dates are within that range. This field is specific to inspection audit sets.
<b>Inspection District</b>	Filters returned records or inspections by inspection district.
<b>Inspection Result</b>	Filters returned records or inspections by inspection result. This field is specific to inspection audit sets.
<b>Inspection Type</b>	Filters returned records or inspections by inspection type. This field is specific to inspection audit sets.
<b>Opened Date</b>	This date range limits returned records or inspections to those opened within that range.
<b>Random By</b>	This field defines (by percentage or by number) the quantity of random records or inspections to audit.
<b>Record Type</b>	Filters returned records or inspections by record type. When you select an item, you also select all subordinate items for your selection in the audit set. The selected record types display in the field.
<b>Record Without Zero Balance</b>	This option include records with unpaid fees in the audit set or includes inspections associated with those records.
<b>Set ID</b>	This a unique identification number for the random audit set.
<b>Set Name</b>	This is the name of the set.
<b>State</b>	Filters returned records or inspections by state.
<b>Status</b>	Filters returned records or inspections by status.

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**Zip Code**

Filters returned records or inspections by zip code.

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# Sets

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Choose a topic from the list below to learn more about working with sets.

## **Related Information**

[Set Overview](#)

[Creating a New Set](#)

[Applying Conditions to a Set](#)

[Adding a Comment to a Set](#)

[Applying Licensed Professionals to a Set](#)

[Applying Owners to a Set](#)

[Applying Contacts to a Set](#)

[Cloning a Set](#)

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[Maintaining Existing Sets](#)

[Creating Records from Parcel Sets](#)

[Importing Parcels from AGIS to a Parcel Set](#)

[Allocating Set Payments](#)

[Generating Reports for Sets](#)

[Executing a Script for Sets](#)

[Performing Random Audits on Sets](#)

[Working with a Set of Sets](#)

[Examining Set Details](#)

## Set Overview

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The Set function enables you organize multiple records, parcels, addresses, and/or licensed professionals into a group, or set, and then use the group for batch processing. For example, you can use a set to simultaneously update several records at the same time. Other functionality includes generating reports and running scripts for all set members in the set.

The Set portlet displays a tab for each set type and provides set details that accommodate the functionality for each. Although the portlets for each set type are similar, some functionality only applies to specific set types. All set types can accommodate conditions, the execution of scripts, and the running of reports. Agencies can configure Civic Platform so that users can generate a record or a record set from a parcel set.

You can also combine record sets to create a “set of sets,” which enables you to engage in set analysis, fee analysis, and payment processing for multiple record sets simultaneously.

Your agency administrator must configure this functionality before it is available for use.



## Creating a New Set

You can group together multiple records, related records, parcels, addresses, or licensed professionals to create a new set.

### To create a new set in the Set portlet

1. Navigate to the Set portlet.  
Civic Platform displays the Set portlet.
2. Click the tab in which you want to create a set. For example, click the Records tab to create a record set or the Parcel tab to create a parcel set.

3. Click **New**.

Civic Platform displays the Set ID form in the portlet.

The screenshot shows a web form for creating a new set. At the top, there is a navigation bar with buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below this, the form is organized into several sections:

- Set ID:** A text input field.
- Set Name \*:** A text input field with an asterisk indicating it is required.
- Comments:** A large text area with a 'check spelling' link below it.
- Set Type:** A dropdown menu currently showing '--Select--'.
- Set Status:** A dropdown menu currently showing '--Select--'.
- Set Status Comments:** A text area with a 'check spelling' link below it.

4. Complete the fields with available data.
5. Click **Submit**.  
Civic Platform creates the set.
6. If you want to add set members to the set, see [Adding Set Members to a Set](#).

## Applying Conditions to a Set

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Civic Platform applies conditions to set members just as it does with individual records. When you apply a condition to a set, the action applies to all records within the set simultaneously. For more information about conditions, see [Conditions](#).

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**Note:**

An agency administrator must enable this feature (see FID 8357 Set Conditions and FID 8352 Parcel Set Create Conditions in the Civic Platform Configuration Reference for more information).

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### To apply conditions to a set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Choose the set to which you want to apply a condition.  
Civic Platform displays the set details.
3. Click the Conditions tab.  
Civic Platform displays the Set conditions list portlet.
4. Click **New**.  
Civic Platform displays the Set conditions detail portlet.
5. Enter available data in the fields.
6. Click **Submit**.

## Adding a Comment to a Set

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You can apply a comment to all set members simultaneously. After you apply a condition, the record, parcel, address, or licensed professional with the condition displays on the Comments tab for the set.

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**Note:**

An agency administrator must enable this feature.

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### To apply a comment to a set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Choose the set to which you want to add a comment.  
Civic Platform displays the set details
3. Click the Comments tab.  
Civic Platform displays the set comments list portlet.
4. Click **New**.  
Civic Platform displays the set comments detail portlet.
5. Add a comment.
6. Click **Submit**.

## Applying Licensed Professionals to a Set

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When applying licensed professionals to a set, the licensed professionals are applied to set members simultaneously. They display on the Licensed Professionals tab for the set. For more information about licensed professionals, see [Licensed Professionals](#).

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**Note:**

An agency administrator must enable this feature.

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### To add or remove a licensed professional

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Choose the set to which you want to apply a licensed professional.  
Civic Platform displays the set details.
3. Click the Licensed Professional tab.  
Civic Platform displays the Set Licensed Professional list portlet.
4. To add a licensed professional, click **New**, enter available data, and click **Submit**.
5. To delete a license professional, select the licensed professional(s) you want to remove, then click **Delete**.

## Applying Owners to a Set

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When applying owners to a set, the owners are applied to set members simultaneously and displayed on the owners tab for the set. For more information about owners, see [Managing Owners](#).

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**Note:**

An agency administrator must enable this feature.

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### To add or remove an owner

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Choose the set you want to work with.  
Civic Platform displays the set details.
3. Click the Owners tab.  
Civic Platform displays the Set Owner list portlet.
4. To add an owner, click **New**, enter available data, and click **Submit**.
5. To delete an owner, select the owner(s) you want to remove, then click **Delete**.

## Applying Contacts to a Set

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When applying Contacts to a record set, the Contacts are applied to set members simultaneously and displayed on the Contacts tab for the set. For more information about Contacts, see [Contacts](#).

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**Note:**

An agency administrator must enable this feature.

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### To manage contacts for a set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Verify you are in the record set portlet. If not, click the Records tab.
3. Choose the set to which you want to apply a contact.  
Civic Platform displays the set details.
4. Click the Contacts tab.  
Civic Platform displays the Set Contacts list portlet.
5. Do one of the following tasks
  - Add a new contact:
    1. Click **New**.
    2. Enter available data, and then click **Submit**.
  - Associate an existing contact:
    1. Click **Look Up**.
    2. Enter search criteria and click **Submit**.
    3. Select one or more contacts, and click **Select**.
    4. Enter the date that the contact becomes active to all set members, and click **OK**.
  - Delete a contact:
    1. Select each contact you want to remove, then click **Delete**.
  - Deactivate a contact:
    1. Select the contact that you want to deactivate on the record.
    2. Click **Deactivate**.
    3. Enter the date that the contact becomes inactive to all set members, and click **OK**.

## Cloning a Set

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You can create a set service request by cloning an existing set service request. Customize the way that Civic Platform clones the set by completing the associated fields and check boxes.

### To clone a set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Select the set you want to clone.
3. Click **Clone**.  
Civic Platform displays the Clone Set portlet.
4. Enter available data in the fields. See [Set Cloning Field Descriptions](#) for field definitions.
5. Click **Submit**.  
Based on your selection, Civic Platform may ask if you are cloning a fee or a parcel.
6. If you select fees, click **OK** to accept the fee to the new record in the set.  
If you select parcels or addresses on each record, select the parcel or address that you want to clone and click **Submit**.
7. Click **Return**.

## Deleting a Set

---

When you delete a set, you are not deleting the individual records - you are only deleting the grouping of them together.

### To delete an existing set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Click the tab containing the set you want to delete.
3. Select each set that you want to delete.
4. Click **Delete**.  
Civic Platform displays the Set ID form in the portlet.



## Maintaining Existing Sets

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Sets enable you to group related records, parcels, addresses, or licensed professionals so that you can process the group as a batch. The topics in this section discuss many of the actions that you can perform while maintaining your sets.

### Topics

- [Adding Set Members to a Set](#)
- [Cloning a Record within a Set](#)
- [Editing Set Name and Comments](#)
- [Deleting Records from a Set](#)
- [Changing the Status in a Record Set](#)
- [Viewing the Set Status History](#)
- [Attaching Documents to a Set](#)
- [Viewing Record Sets](#)
- [Updating a Task for Set Records](#)
- [Copying Set Members](#)

### Adding Set Members to a Set

You can add one or more set members as needed to a set. You determine which ones belong to a set and how many the set includes. There is no limit to the number of set members that you can add to a set nor to the number of sets to which a record (or a parcel, an address, or a licensed professional) can belong.

#### To add a record to a set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Use Search to locate the desired set, then click the Set ID link for the set to which you want to add a record.  
Civic Platform displays the Set ID details in the portlet.
3. Click the Set Member tab.
4. Click **Look Up**.
  - If you add a record to a record set, select **Look Up Record**.
5. Enter the search criteria to locate the records, parcels, addresses, or licensed professionals you want to add. See [Using the Search Features](#) for instructions on locating a record or an object.



#### Note:

You can add external parcels as set members of a parcel set, or add external addresses as set members of an address set.

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6. Click **Submit**.

Civic Platform displays a list of records, or parcels, addresses, or licensed professionals that match your look up criteria.

7. Select each record or object that you want to add to the set.
8. Click **Submit**.

Civic Platform adds the selected set members to the set.



**Note:**

You can usually sort set members by any column in the set members list, except that if a parcel set contains external parcels, you can only sort the set members by Parcel #, not by the other columns.

## Cloning a Record within a Set

You can create a new record by cloning an existing set record.

### To clone a set record

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Use Search to locate the set with the record that you want to clone.  
Civic Platform displays the search results in the Set ID portlet.
3. Click the Set ID link of the set with the record you want to clone.  
Civic Platform displays the Set ID details.
4. Click the Set Member tab.
5. Select the record that you want to clone. You can clone only one record at a time.
6. Click **Clone**.  
Civic Platform displays the cloning form.

SET ID: 582

Menu ▾   Submit   Reset   Cancel   Help

Application #: 05BLD-00000-00122

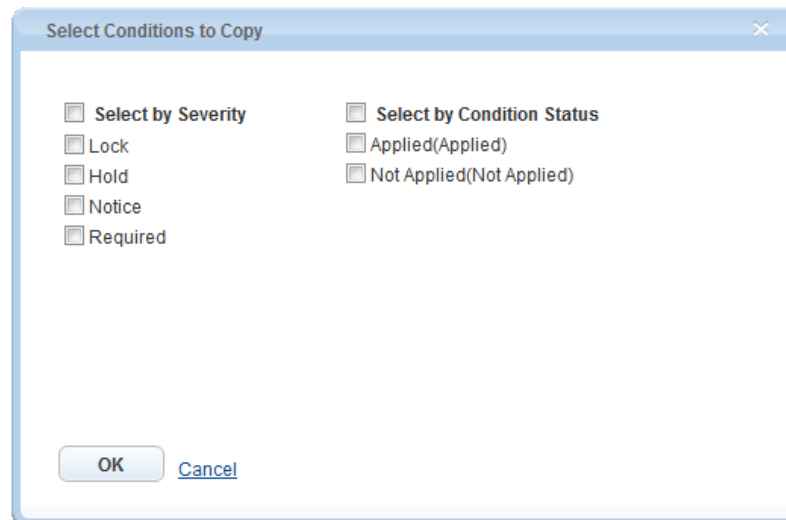
No. of Clones:

Includes:

<p><b>Record Type - Specific Information</b></p> <p><input type="checkbox"/> Fee Items (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Workflow Status</p> <p><input type="checkbox"/> Inspection (<a href="#">Select</a>)</p> <p><input type="checkbox"/> App Specific Info (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Additional Info</p> <p><input type="checkbox"/> Valuation Calc</p> <p><input type="checkbox"/> Workflow Task Specific Information</p> <p><input type="checkbox"/> Status or New Status: <input type="text" value="--Select--"/></p> <p><input type="checkbox"/> Status History</p>	<p><b>General Record Information</b></p> <p><input type="checkbox"/> Record Details (<a href="#">Set Application Description</a>)</p> <p><input type="checkbox"/> Parcel</p> <p><input type="checkbox"/> Owner</p> <p><input type="checkbox"/> Address</p> <p><input type="checkbox"/> Assets</p> <p><input type="checkbox"/> Licensed Professionals (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Contact (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Document</p> <p><input type="checkbox"/> Preserve Dates</p>	<p><input type="checkbox"/> Record Conditions (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Inspection Conditions (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Conditions of Approval (<a href="#">Select</a>)</p> <p><input type="checkbox"/> Education</p> <p><input type="checkbox"/> Continuing Education</p> <p><input type="checkbox"/> Examination</p> <p><input type="checkbox"/> Record Comments</p> <p><input type="checkbox"/> Activities</p>
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7. Specify the number of clones to create.
8. Select the data elements that you want to copy from the source record to the newly created clone(s).
9. If you select a data element that allows you drill down further and select more specific data elements, click the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which of the data elements to copy.

For example, if you click the **Select** link for Conditions of Approval, a dialog displays, prompting you to select which conditions to copy both by severity and by condition status.



- a. To select all of the options in a list, select the **bolded** option at the head of the list.
- b. To select certain options in a list, clear the **bolded** option at the head of the list and select only those options you want to copy.
- c. Click **OK**.

10. If you select **Status or New Status**, you can use the drop-down list to specify a particular status to copy. Otherwise, leave the drop-down list field blank to copy all status options.



**Note:**

When you select **Status or New Status**, Civic Platform enables the **Status History** option and you can select it as well.

11. Click **Submit**.

Civic Platform numbers each cloned record in sequence +1 from the original record.

Civic Platform displays a message listing the number of successfully cloned records in the Set Member list portlet.

## Editing Set Name and Comments

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Use Search to locate the set that you want to edit.  
Civic Platform displays the search results in the Set ID portlet.
3. Click the link in the **Set ID** column for the set you want.  
Civic Platform displays the Set tab with the Set Name and Comment fields.
4. Modify the fields as needed.
5. Click **Submit**.

## Deleting Records from a Set

1. Navigate to the Set portlet.

Civic Platform displays the portlet.

2. Use Search to locate the set that with the record that you want to remove.  
Civic Platform displays the search results in the Set ID portlet.
3. Click the link in the **Set ID** column for the Set you want.  
Civic Platform displays the Set tab with the Set Name and Comment fields.
4. Click the Set Member tab.
5. Select each record that you want to remove from the set.
6. Click **Delete**.

## Changing the Status in a Record Set

When you change the status of a set, Civic Platform applies the change to set members simultaneously and also displays the new status on the Status tab for the set.



### Note:

An agency administrator must enable this feature (see 8364-Set Status Change in the Civic Platform Configuration Reference for more information about configuring FIDs).

### To change the status of set members

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Verify you are in the Record set portlet. If not, click the Records tab.
3. Choose the set to which you want to apply a change of status.  
Civic Platform displays the set details.
4. Click the **Status** tab.  
Civic Platform displays the Set Status form portlet.
5. Complete the fields.

<b>Action by</b>	Use the drop-down list to select the user who is changing the status for the set.
<b>Action by Department</b>	Use the drop-down list to select the department from which the status request originated.
<b>Comments</b>	Enter any comments regarding the change of status.
<b>New Status</b>	Use the drop-down list to select the status for the set members.
<b>Status Date</b>	Enter the date or use the calendar to select the date of the change of status.

6. Click **Save**.

## Viewing the Set Status History

Use the Set Status History tab on the Set detail portlet to review and/or track the status history of a set. Civic Platform creates status history records each time there is a status change or a status comment change. The Set Status History is a valuable reference tool for bulk document printing, because it enables you to view the a summary of activity (based on the set status), such as who performed tasks and when.

### To view set status history

1. Access the Set details portlet either by clicking the Set link in the Main Links section at the top of your console or by clicking the Set tab on the record detail portlet.
2. Click the Set Status History tab.  
The Set Status History page displays.

Set Status	Set Status Date	Action By	Set Status Comments
Report ru...	11/30/2012	ADMIN	Set Status comment goes here.
Mailed	11/30/2012	ADMIN	Set Status comment goes here.
	11/30/2012	ADMIN	Set Status comment goes here.

The display includes the following columns of data: Set Status, Set Status Date, and Set Status Comment.

3. Click any data column header to sort the set status history records by that column in ascending or descending order.

## Attaching Documents to a Set

You can use the Documents secondary tab on the Set detail portlet to attach documents, such as receipts for a set payment, to an entire set of records. This ability is separate from the ability to attach documents to records that are members of a set.



### Note:

If you have a set script that auto-generates a report for the set, Civic Platform saves that report to this tab.

When you attach a document to a set, you use the same process as you use when attaching a document to a record. See [Attaching Files](#) for information about attaching documents to a record or a set.

## Viewing Record Sets

The Set tab on the Record detail portlet lists the sets for which the current record is a set member. You can search the list and you can view data about the sets such as set ID, set name, set type, the latest set status and set status date, set comments and more. If you click the set ID link for a set, you can access the Set detail portlet directly.

### To access the Set tab for a record

1. Navigate to the Record list portlet.
2. Either use the portlet Search functionality or invoke a QuickQuery to locate the record you want to work with.
3. Click the Record ID link to open the Record detail portlet.
4. Click the Set tab.  
The Set page displays.
5. To view set details, click the Set ID link for the set you want to see.  
The Set details portlet displays.

SET ID: 10110

Menu Submit Reset Execute Script Help Data Language(English (US))

Set Set Member (..) Comments (..) Conditions (..) Conditions of Approval (..) Contacts (..) Documents Owner (..) Payment Professionals (..) Set Sta ▶

Set ID: 10110 Set Name: SETTEST

Set Type: Other Set Status: --Select--

Comments: [check spelling](#)

Set Status Date:

Set Status Comments: [check spelling](#)

### Updating a Task for Set Records

If you assign a task to the records in a set, you can edit ongoing task details such as record type, status, or responsible department as needed.

#### To update a task for set records

1. Navigate to the Set portlet.
2. Click the Records tab.  
Civic Platform displays the sets.
3. Click a set link in the Set ID column.
4. Click the Workflow Status tab.  
Civic Platform displays the task list.

SET ID: 12-CAP-00012

Menu Status Change Help

Set Set Member (2) Comments (0) Conditions (0) Contacts (3) Workflow Status

Task Name	Task Status	Record ID	Number of Tasks
Application ...	submit	12CAP-00000-00066...	1
Building Review		12CAP-00000-00066...	1
Closure		12CAP-00000-00066...	1
Examination		LIC12-00000-00199...	1
Issue License	Pending	LIC12-00000-00199...	1
License Status		LIC12-00000-00199...	1
Submit Appli...	Applicati...	LIC12-00000-00199...	1

5. Click the Status Change tab.  
Civic Platform displays the set workflow status portlet.

SET ID: 12-CAP-00012

Menu Submit Reset Cancel Help

Set Set Member (2) Comments (0) Conditions (0) Contacts (3) Owner (0) Payment Professionals (1) Status Workflow Status

Record Type: --Select--

Status To: assign

Action By: Current User (admin admin)

Task: Application Acceptance

Status Date: 12/13/2012

Comments: Standard Comment [check spelling](#)

Status From: No Status

Action By Department: Current Department (Licenses)

6. Complete the fields.

**Record Type** Choose a record type that you want to change its task status.

<b>Task</b>	Choose a task whose status you want to change.
<b>Status From</b>	Use to filter by a former status value.
<b>Status To</b>	Use to filter by a new status value.
<b>Status Date</b>	Use to filter by the date when the task reached its current status.
<b>Action By Department</b>	Use to filter by the department that last updated the task status.
<b>Action By</b>	Use to filter by the individual who last updated the task status.
<b>Comments</b>	Use to add the comments for the task status update.

## 7. Click **Submit**.

Civic Platform saves the status change you made to the task.

## Copying Set Members

You can copy set members from one set to another without impacting the set member list for the source set. When you copy set members, you select a target set, which is the set where you want to add members, then you select a source set, from which you want to copy members. Civic Platform adds all source set members that do not already exist in the target set to the set member list for the target set.



### Note:

When you copy set members from a source set to a target set, Civic Platform does not remove the set members in the source set. Your source set remains intact.

### To copy set members from one set to another

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Use Search in the Set list portlet to locate the target set to which you want to add members.
3. Click the Set ID link for the desired target set to open the set details portlet for your target set.
4. Hover your mouse cursor on the **Look Up** button and select **Look Up Set**.  
A search form displays.

5. Enter search criteria as needed to locate the source set from which you want to copy set members.
6. Click **Submit**.  
A list of sets matching your search criteria displays.
7. Select the set that you want to use as your source set.

SET ID: 310

Menu

<input type="checkbox"/>	<u>Set ID</u>	<u>Set Name</u>	<u>Comments</u>	<u>Set Type</u>	<u>Set Status</u>	<u>Set Status Date</u>	<u>Set Status Comments</u>
<input checked="" type="checkbox"/>	10110	SETTEST		Other			

**8. Click **Select**.**

Civic Platform copies the set members from the source set to the target set.



## Creating Records from Parcel Sets

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Civic Platform enables the creation of records and record sets from a parcel set. Specify the parcel condition and status criteria in the applicable fields.

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**Note:**

An agency administrator must enable this feature.

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### To create a Record from a parcel set

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Click the Parcel tab.
3. Choose the parcel set for which you want to generate a record.  
Civic Platform displays the set details.
4. Click the Create Record tab.  
Civic Platform displays the Set Create Record portlet.
5. Enter data in the fields as available. See [Record Creation Field Descriptions](#) for field definitions
6. Click **Submit**.  
Civic Platform displays the new record set in the Record Set list portlet. All rejected parcels display in the Parcel Set List portlet under the Rejected Parcel Set ID.

## Importing Parcels from GIS to a Parcel Set

Use Accela GIS to collect parcels for a parcel set. After you name a parcel set, you can click the **GIS Import** button to open the map viewer and select the applicable parcels for your set. For more information on how to import parcels from GIS to a parcel set, refer to the respective Accela Civic Platform GIS documentation set.

### To import parcels from GIS

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Click the Parcel tab.
3. Choose the parcel set to which you want to add parcels from GIS.  
Civic Platform displays the set details.
4. Click the Set Member tab.  
Civic Platform displays each parcel in the parcel set.

The screenshot shows the 'Set' portlet in the Accela Civic Platform. The 'Parcels (1)' tab is active, showing a table with one row: Set ID P0008, Set Name EAST PARCEL. Below this, the 'Set Member (3)' tab is active, showing a table with three rows of parcel data.

Parcel #	Address	Owner	Lot	Block	Tract	Parcel Area
11001100	1100 BELL...	SWEENEY TODD				1200
3344567	7 MISSION...		567	3344		9000
44004400	4400 CROC...	CAMILLE L...	12	123		3400

5. Click **GIS Import**.  
Civic Platform displays the GIS map viewer.
6. Select the parcels from the Map viewer.  
The list of selected parcels is displayed at the bottom of the view.
7. Select **Send Features to AA** from the drop-down list.
8. Click **Submit**.  
Civic Platform displays the parcels in a parcel list pop-up window.
9. Select each parcel that you want to add to the parcel set.
10. Click **Submit**.

## Allocating Set Payments

Using set functionality, you can accept and allocate payments made toward the fee items that belong to any record within a record set, saving time and improving efficiency.

You can accept full or partial payment towards the total outstanding balance for all records within the set (you cannot accept a payment that exceeds the total outstanding balance). After entering the payment amount, you can determine what amount of the total payment you want to allocate to each fee item within the set.

Civic Platform summarizes the set, including the following information:

- Total number of records in the set
- Number of fee items that have been paid
- Total job value of all records in the set
- Total fees that have been assessed and invoiced for the set
- Any payments that have been made toward the set
- Outstanding balance for all records in the set.



### Note:

Before you can save set payment information, you must start a cashier session. For information about managing cashier sessions, see [Working with a Cash Drawer Interface](#) . For more information about accepting and allocating set payments, see [Accepting and Allocating Set Payments](#) .

### To accept and allocate set payments

1. Navigate to the **Set** portlet.  
Civic Platform displays the portlet.
2. Use Search to locate the set you want to work with.  
Civic Platform displays the search results in the Set ID portlet.
3. Click the link in the **Set ID** column for the Set you want.  
Civic Platform displays the Set ID detail portlet.

SET ID: 10110

Menu Submit Reset Execute Script Help Data Language English (US)

Set Set Member (...) Comments (...) Conditions (...) Conditions of Approval (...) Contacts (...) Documents Owner (...) Payment Professionals (...) Set St

Set ID: 10110 Set Name: SETTEST

Set Type: Other Set Status: --Select--

Comments:   
[check spelling](#)

Set Status Date:   
[check spelling](#)

4. Click the Payment tab.  
Civic Platform displays the Set Payment detail portlet.
5. Click **Pay**.

**Note:**

Your agency administrator must enable Standard Choice, Allow\_Negative\_Fee\_Transfer\_As\_Credit, in order to process a negative fee item on a record in a set.

---

The Set Payment detail portlet displays.

6. Complete the fields with available data as required. See [Payment Details for a Set](#) for field definitions.
7. Click **Submit**.  
If you did not start a cashier session yet, Civic Platform displays a cashier session pop-up window. See [Working with a Cash Drawer Interface](#) for more information.  
Civic Platform displays a Set Payment Allocation pop-up window.
8. If you are receiving a payment for the entire balance, click **Full Pay**.  
If you are receiving only partial payment, determine what part of the payment you want to allocate to each fee item and enter that amount in the **Amount** field for each fee item.
9. Click **Submit**.  
Civic Platform generates a receipt summarizing the payment. A set payment has a unique set receipt number; the payment for each individual record has its own receipt number as well. You can print this receipt or save it to a file, as necessary.  
If your agency uses a cash drawer and receipt printer, Civic Platform prints a receipt and displays the itemized receipt in a pop-up window.
10. If Civic Platform displays the receipt in a pop-up window so you can print the receipt as needed. Close the window when you finish.
11. If payment method = Check and your agency uses a receipt printer, insert the check in the printer to print the endorsement on the check.  
If payment method = Cash and the payment amount is more than the amount due, Civic Platform calculates the amount of change due.

## Generating Reports for Sets

Civic Platform provides the same functionality for printing and viewing reports for a set as it does for individual Records, parcels, addresses, or licensed professionals. After a report is selected, the specified report runs one time for each set member.



**Note:**

Report Manager configuration defines the list of reports available for sets. If you have problems running a report, contact your agency administrator.

### To generate set member reports

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Click the Set Type tab which holds the applicable set.
3. Choose the set to which you want to run a report.  
Civic Platform displays the set details.
4. Click the Set Member tab.
5. Select the set members for which you want reports generated.
6. Click **Reports**.

SET ID: TOBEMERGED

Menu Look Up Search Clone Delete Reports Help My QuickQueries --Select--

Set Set Member (2) Attachments Comments (0) Conditions (0) Conditions of Approval (0) Contacts (17)

Record ID

<input type="checkbox"/>	Record ID	Brief Description	Street Name	Last Name	City	Assigned to Staff	Number	Record Type	Dir
<input checked="" type="checkbox"/>	13CPF-00000-00001							Planning/Planning	
<input checked="" type="checkbox"/>	13CAP-00000-00006							Building/ALM	

7. Select a report from the drop-down list.  
Civic Platform generates a report for each specified set member.

## Executing a Script for Sets

Civic Platform provides the ability to run a pre-configured EMSE (event manager and script engine) script from the Set detail portlet on set members for record, parcel, address, and licensed professional sets.



**Note:**

This feature requires an agency administrator to set the relevant Function Identifications (FIDs) to Full Access and configure the related Standard Choices for each set type.

If you have problems executing a script, contact your agency administrator.

1. Navigate to the Set portlet.  
Civic Platform displays the portlet.
2. Click the set type tab which holds the applicable set.
3. Choose the set to which you want to execute a script.  
Civic Platform displays the set details.
4. Click the Set tab.  
Civic Platform displays the Set Status form portlet.
5. Click **Execute Script**.

The screenshot shows the 'Set' portlet interface. At the top, there is a 'Menu' dropdown and buttons for 'New', 'Search', 'Delete', 'Clone', and 'Help'. Below this, there are tabs for different set types: 'Records (24)', 'Parcels (5)', 'Addresses (1)', 'Licensed Prof (1)', 'Sets (1)', and 'Random Audit (1)'. A table lists the sets with columns for 'Set ID', 'Set Name', and 'Comment'. The table contains two rows: one for '12-CAP-00012' with 'CONTACT RECORD SET' and another for '12-CAP-00013' with 'TTS'. Below the table, there is a detailed view for 'SET ID: 12-CAP-00012' with a 'Menu' dropdown and buttons for 'Submit', 'Reset', 'Execute Script', 'Reports', and 'Help'. At the bottom, there are tabs for 'Set', 'Set Member (2)', 'Comments (0)', 'Conditions (0)', 'Contacts (3)', 'Owner (0)', and 'Paymer'. The 'Set' tab is active, showing fields for 'Set ID' (12-CAP-00012), 'Set Name' (CONTACT RECORD SET), and 'Comment'. A 'check spelling' link is visible at the bottom.

6. Select a script from the drop-down list.  
Civic Platform executes the script on all set members.

## Performing Random Audits on Sets

---

You can designate a specific group of records (permits, applications, work orders) using parameters you create, and then generate a random selection set for audit purposes from within that group. Use this audit set to execute scripts, run reports, apply filters, and otherwise audit the set of records.

Example: You want to audit twenty electrical licenses. After you define the set parameters, the audit set is generated, creating a list of twenty randomly selected electrical licenses that fall within the set parameters. A script is executed to contact the licensees, notifying them that they are being audited (or to automatically create mailing labels to send hard copies). The script then generates a report to audit fees and continuing education requirements.

Each permit, application, work order, or other type of record can belong to multiple audit sets. Records with locked or hold conditions are not excluded. For more information about managing random audits, see [Random Audits](#).

## Working with a Set of Sets

You can create a set of sets by combining record sets, enabling you to use batch processing for multiple record sets. For example, you can identify and pay unpaid invoiced fee items for multiple record sets simultaneously. Another example: You may want to combine record sets related to a particular building or development project, providing a convenient method for analyzing and processing records, calculating total job values, assessing/verifying fees, and processing fee payments.



### Note:

Your agency administrator must set the relevant Function Identifications (FIDs) to Full Access and configure the related Standard Choices for the sets of sets feature to properly function.

### Topics

- [Administering Sets](#)
- [Analyzing Sets](#)
- [Analyzing Fees](#)
- [Processing Payments](#)

## Administering Sets

You can create and modify sets of sets, view fees, and process payments for Record member sets using the Sets tab.

### Topics

- [Creating a Set of Sets](#)
- [Deleting a Set of Sets](#)
- [Associating a Record with a Set of Sets](#)
- [Viewing Set of Sets Members](#)
- [Removing a Record Set from a Set of Sets](#)

## Creating a Set of Sets

Create a set of sets to analyze record set information for multiple Record sets, including reviewing fees assessed and making payments.

### To create a set of sets

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.
2. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet

Set		
Set ID	Set Name	Comments
<input type="checkbox"/> 119	EMERGENCY...	



### 3. Click **New**.

Civic Platform displays the New Set of Sets portlet.

### 4. Complete the New Set of Set portlet fields:

- |                 |  |
|-----------------|--|
| <b>Set ID</b>   | Civic Platform automatically generates a code for the set of sets. If you want to change the ID, enter a unique alphanumeric abbreviation. |
| <b>Set Name</b> | Enter a name that identifies the set of sets. If you enter an existing name, Civic Platform displays a warning message.                    |
| <b>Comment</b>  | Enter any comments that identify the set of sets or explain its purpose.   |

### 5. Click **Submit**.

Civic Platform adds the set to the Set of Sets list portlet.

### 6. Click the Set Member tab in the Set of Sets detail portlet.

Civic Platform displays the Record Set ID Numbers for set members.

Set ID	Set Name	Comment
<input type="checkbox"/> 13-CAP-00002	AS	

### 7. Click **Look Up**.

Civic Platform displays the Record Set Search page.

### 8. Complete the fields in the Record Set Search page and click **Submit**.

Civic Platform displays the set or sets that match your search criteria.

### 9. Select the set that you want to add to the set of sets and click **Submit**.

Civic Platform adds the set to the set of sets.

## Deleting a Set of Sets

Delete a set of sets as needed. When you delete a set of sets, you simply remove record set member associations you do not delete record sets.

### To delete a set of sets

#### 1. Click the **Sets** main link

Civic Platform displays the Set portlet.

#### 2. Click the Sets tab.

Civic Platform displays the Set of Sets list portlet.

#### 3. Select the sets of sets that you want to delete and click **Delete**.

Civic Platform deletes the set of sets.

## Associating a Record with a Set of Sets

Associate record sets with a set of sets based on your agency's needs. You may want to associate record sets related to a similar building or a development project.

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.
2. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
3. Click the set of sets to which you want to add set members.  
Civic Platform displays the Set of Sets Detail portlet.
4. Click the Set Member tab.  
Civic Platform displays the Record Set ID Numbers for set members.
5. Click **Look Up**.  
Civic Platform displays the Record Set Search page.
6. Complete the fields in the Record Set Search page and click **Submit**.  
Civic Platform displays the set or sets that match your search criteria.
7. Select the sets that you want to add to the set of sets and click **Submit**.  
Civic Platform adds the set to the set of sets.

## Viewing Set of Sets Members

You can view set member records and record details using the Set Member tab.

### To view Record set members

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.
2. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
3. Select the set of sets for which you want to view set members.  
Civic Platform displays the Set of Sets detail portlet.
4. Click the Set Member tab.  
Civic Platform displays the Record set ID Numbers for set members.
5. To view record details for a particular set, click a set ID.  
Civic Platform displays the Record Set Detail portlet.

## Removing a Record Set from a Set of Sets

You can remove a record set from a set of sets as needed. Removal of a record set from a set of sets simply dissolves the association between the record set and the set of sets. the record set remains intact.

### To remove a record set from a set of sets

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.

2. Click the Sets tab.  
Civic Platform displays the set of sets list portlet.
3. Click the Set Member tab in the set of sets detail portlet.  
Civic Platform displays the record set ID numbers for set members.
4. Select the record set that you want to remove from the associated set of sets and click **Delete**.  
Civic Platform confirms that the removal of the record set from the associated set of sets.

## Analyzing Sets

The Set Analysis portlet displays fee information for set member records. The fields list the set member records based on whether they have active conditions at Lock or Hold severity levels. Records with Lock or Hold conditions display in the locked column; Records that do not have active conditions with locks display in the Not Locked column.



### Note:

A Record can belong to more than one record set. If a record is a member of two sets, and both sets belong to the same set of sets, then the respective record details display only one time in the Set Analysis portlet.

You can easily determine the fee status for set of set Record members using the Set Analysis portlet. When you select the Set Analysis tab, Civic Platform iterates through the set of sets members and displays financial data, including the total invoice balance and the total fees paid.

### To view set analysis information

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.
2. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
3. Click the set of sets for which you want to view set analysis.  
Civic Platform displays the Set of Sets Detail portlet.
4. Click the Set Analysis tab.  
Civic Platform iterates through the set and displays the financial data.

SET OF SETS: 12-SETS-00016			
Help			
Set Set Member (1) Set Analysis Fee Analysis Payment			
Total Records 1			
	Locked	Not Locked	Total
Total Job Value	0.00	0.00	0.00
Total Fee Invoiced	0.00	240.00	240.00
Total Fee Applied	0.00	240.00	240.00
Total Invoice Balance	0.00	0.00	0.00
All Fees Paid	0	1	1
Fees Required	0	0	0
Fees Overpaid	0	1	1

5. Review the fields for the selected set of sets. See [Set Analysis Field Descriptions](#) for field descriptions.

**Note:**

The field values in List 5: “Set Analysis Field Descriptions” on page 484 are based on the setting of the Standard Choice ALLOW\_NEGATIVE\_FEE\_TRANSFER\_AS\_CREDIT to a value of Yes. If your agency administrator sets the Standard Choice Value to No, then the fields only display Records without any remaining overpaid invoiced fee items.

## Analyzing Fees

The Fee Analysis tab displays fees related to all the Record set members in a set of sets. When you select the Fee Analysis tab, Civic Platform iterates through the Record set members and builds a grid displaying total Record fees, payments, and balances due.

**Note:**

A single Record may be associated to multiple Record sets. If a Record is a member of two sets that are associated with the same set of sets, then the respective Record details display only one time in the Fee Analysis portlet.

### To view fee analysis information

1. Click the **Sets** main link  
Civic Platform displays the Set portlet.
2. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
3. Click the set of sets for which you want to view set analysis.  
Civic Platform displays the Set of Sets Detail portlet.
4. Click the Fee Analysis tab.  
Civic Platform iterates through the set and displays the financial data.

SET OF SETS: 12-SETS-00016				
Menu ▾ Help				
Set Set Member (1) Set Analysis <b>Fee Analysis</b> Payment				
Record ID	Total Fee Assessed	Total Fee Invoiced	Total Fee Applied	Total Invoice Balance
13CAP-00000011	\$300.00	\$240.00	\$240.00	\$0.00

5. Review the fields for the selected set of sets. For field descriptions, see [Fee Analysis Fields](#).

## Processing Payments

You can use the Payment tab to apply partial or full payments to record members in a set of sets. This allows you to run batch processing on a larger scale than you can with the existing Record set payments functionality. Use the buttons at the top of the portlet to pay full and partial invoices, pay specific fee items for set members, and void payments.

**Note:**

A single Record may be associated to multiple Record sets. If a Record is a member of two sets that are associated with the same set of sets, then the respective Record details display only one time in the Payment portlet.

### Topics

- [Working with the Fee Items Pay button](#)

- [Working with the Pay button](#)
- [Voiding a Payment](#)

## Working with the Fee Items Pay button

The **Fee Items Pay** button allows you to specify payments for particular set of sets Record members. You can apply a specific amount to all Record invoiced fee items. The specified fee payment amount is only applied to Record members where the invoiced fee item amount due is greater than or equal to the amount being applied to the fee item. After you submit a specified payment, the Pay page displays and the Amount box is populated with the total amount. You can pay only this amount by selecting the payment method and clicking the Submit button on the Pay page. Use the buttons at the top of the portlet to Submit, Reset, or Cancel payments.

### To make specific fee item payments

1. Navigate to the Cashier Session portlet and click **New Session**.  
Civic Platform begins a cashiering session.
2. Click the **Sets** main link  
Civic Platform displays the Set portlet.
3. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
4. Click the set of sets for which you want to make a payment.  
Civic Platform displays the Set of Sets Detail portlet.
5. Click the Payment tab.  
Civic Platform iterates through the set and displays the financial data.

SET OF SETS: 12-SETS-00016

Menu ▾ Pay Fee Items Pay Void Help

Set Set Member (1) Set Analysis Fee Analysis Payment

Set Members: 1 Terminal #:

All Fees Paid: 1 Cashier ID: ADMIN

Valuation: \$0.00 Date: 01/31/2013

Total Fee Assessed: \$300.00

Total Fee Invoiced: \$240.00

Total Fee Applied: \$240.00

Total Invoice Balance: \$0.00

Total Credits: \$60.00

Total Balance: (\$60.00)

**Transactions**

<input type="checkbox"/>	Cashier ID	Transaction Code	Method	Receipt #	Amount	Status	Received	Trust Account ID	Date
<input type="checkbox"/>	AMBER		Trust Account	25	\$2.00	Voided		0108	01/17/2013
<input type="checkbox"/>	ELAINE		Cash	23	\$1.00	New			01/17/2013

6. Review the fields for the selected set of sets. For field descriptions, see [Payment Processing Fields](#).
7. Click **Fee Items Pay** at the top of the portlet.  
Civic Platform displays the Fee Items Pay page.

SET OF SETS: 12-SETS-00011								
Menu ▾ Submit Reset Cancel Help								
Set Set Member (10) Set Analysis Fee Analysis Payment								
Fee Code	Fee Item	Quantity	Fee	Paid	Outstanding	Amount Per Record	Record Count	Payment Amount
FEEITEM001	Feeitem001	2	\$120.00	\$119.00	\$1.00	0.00	0	0.00
								Total:
								0.00

8. Complete the fields for the selected set of sets. For field descriptions, see [Fee Items Pay Fields](#).



**Note:**

If a Record has multiple fee items that are the same, only the first fee item displays in the Fee Item List. Duplicate fee items for individual Records do not display.

9. Click **Submit**.

Civic Platform displays the Pay page. The specified amount displays in the Amount field, which is read-only.

10. Complete the fields on the Pay page. For field descriptions, see [Payment Details for a Set](#).

## Working with the Pay button

You can make full or partial payments for set of sets Record members using the Pay button.

### Topics

- [Making Full Payments](#)
- [Making Partial Payments](#)

## Making Full Payments

You can pay record set member invoice amounts in full as necessary.

### To make a full payment

1. Navigate to the Cashier Session portlet and click **New Session**.  
Civic Platform begins a cashiering session.
2. Click the **Sets** main link  
Civic Platform displays the Set portlet.
3. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
4. Click the set of sets for which you want to make a payment.  
Civic Platform displays the Set of Sets Detail portlet.
5. Click the Payment tab.  
Civic Platform iterates through the set and displays the financial data.

SET OF SETS: 12-SETS-00016

Menu Pay Fee Items Pay Void Help

Set Set Member (1) Set Analysis Fee Analysis Payment

Set Members: 1 Terminal #:

All Fees Paid: 1 Cashier ID: ADMIN

Valuation: \$0.00 Date: 01/31/2013

Total Fee Assessed: \$300.00

Total Fee Invoiced: \$240.00

Total Fee Applied: \$240.00

Total Invoice Balance: \$0.00

Total Credits: \$60.00

Total Balance: (\$60.00)

Transactions

<input type="checkbox"/>	Cashier ID	Transaction Code	Method	Receipt #	Amount	Status	Received	Trust Account ID	Date
<input type="checkbox"/>	AMBER		Trust Account	25	\$2.00	Voided		0108	01/17/2013
<input type="checkbox"/>	ELAINE		Cash	23	\$1.00	New			01/17/2013

6. Review the fields for the selected set of sets. For field descriptions, see [Payment Processing Fields](#).

7. Click **Pay** at the top of the portlet.

Civic Platform displays the Pay page and populates the Amount field with the total invoice balance due.

SET OF SETS: 13-SETS-00003

Menu Submit Reset Cancel Help

Set Set Member (1) Set Analysis Fee Analysis Payment

Method:

Check Type:

Check Number:

Check Holder's Name:

City:

Zip:

Business Name:

Amount:

Routing Number:

Driver's License:

Phone Number:

Street:

Check Holder's E-mail:

Comment:

Check Processing Type:

Account Number:

SSN/Federal Tax ID:

State/Province:

Street Address2:

Received:

[check spelling](#)

8. Complete the fields on the Pay page and click **Submit**. For a list of field descriptions, see [Payment Details for a Set](#).

Civic Platform applies the payment amount to set of set Record members.

### Making Partial Payments

1. Navigate to the Cashier Session portlet and click **New Session**.

Civic Platform begins a cashiering session.

2. Open the Sets portlet and click the Sets tab.

Civic Platform displays the Set of Sets list portlet.

3. Click the set of sets for which you want to make a partial payment.

Civic Platform displays the Set of Sets Detail portlet.

4. Click the Payment tab.

Civic Platform iterates through the set and displays the financial data.

5. Review the fields for the selected set of sets. For field descriptions, see [Payment Processing Fields](#).

6. Click **Pay** at the top of the portlet.  
Civic Platform displays the Pay page. For a list of field descriptions, see [Payment Details for a Set](#).
7. To make a partial payment, which means paying less than the invoice balance due for all set of set Record members, enter a smaller amount in the Amount field and click **Submit**.  
Civic Platform displays the Apply Payment page.
8. Complete the fields on the Apply Payment page. For a list of field descriptions, see [Apply Partial Payment Fields](#).
9. Click **Save**.  
If you are making a partial payment towards any of the fee items using cash, Civic Platform displays a message indicating the remaining change due.
10. Click **OK** to continue.  
Civic Platform displays a payment receipt

## Voiding a Payment

1. Navigate to the Cashier Session portlet and click **New Session**.  
Civic Platform begins a cashiering session.
2. Click the **Sets** main link  
Civic Platform displays the Set portlet.
3. Click the Sets tab.  
Civic Platform displays the Set of Sets list portlet.
4. Click the set of sets for which you want to make a partial payment.  
Civic Platform displays the Set of Sets Detail portlet.
5. Click the Payment tab.  
Civic Platform iterates through the set and displays the financial data.
6. Locate the **Transactions** section, select the payment you want to void, then click **Void**.  
Civic Platform displays the Void Sets of Sets Payment page.
7. Enter any comments related to the voided transaction, such as a reason for the void transaction
8. Click **Submit**.  
Civic Platform voids the transaction.



## Examining Set Details

The following tables list and define the default fields available in the different interfaces you may encounter when working with sets.

- [Set Cloning Field Descriptions](#)
- [Record Creation Field Descriptions](#)
- [Payment Details for a Set](#)
- [Set Analysis Field Descriptions](#)
- [Payment Processing Fields](#)
- [Fee Items Pay Fields](#)
- [Apply Partial Payment Fields](#)
- [Fee Analysis Fields](#)

### Set Cloning Field Descriptions

The following fields are available by default when cloning a set.

Table 56: Cloning a Set Field Descriptions

<b>Application Specific Information</b>	Select this option to clone the Application Specific Information for each set member.
<b>Additional Info</b>	Select this option to clone the additional information for each set member.
<b>Contacts</b>	Select this option to clone the contacts for each set member.
<b>Fees</b>	Select from the following options. <b>Clone All Fees:</b> Select this option to clone all fees for all set members. <b>Prompt for Each Member:</b> Select this option to prompt for fee transfer come up for each set member. Click <b>OK</b> to transfer the fees for the set member, Click <b>Cancel</b> to reject the transfer of fees for the set member. <b>Do Not Clone Fees:</b> Select this option to reject the cloning of fees for set members.
<b>From (Record ID)</b>	Select the first Record ID in the range of Records you want to clone.
<b>Inspection Conditions</b>	Select this option to clone the inspection conditions for each set member.
<b>Inspections</b>	Select this option to clone the inspections for each set member.
<b>To (Record ID)</b>	From the drop-down list, select the end record ID in the range of records you want to clone.
<b>Licensed Professionals</b>	Select this option to clone the licensed professionals for each set member.
<b>Locations</b>	Specify how you want to handle Address and Parcel information. <b>No Prompting:</b> Civic Platform clones parcel and address information for each set member. (default) <b>Prompt for Parcel:</b> Civic Platform prompts the user to select parcels for each set member when cloning occurs. <b>Prompt for Address:</b> Civic Platform prompts the user to select addresses for each set member when cloning occurs. Parcels associated with a selected address attach to the record as well.

<b>No. of Clones</b>	Enter the number of records that you want to clone for each set member.
<b>Preserve Dates</b>	Select this option to clone the record related dates for each set member. If this is not marked, Civic Platform assigns standard record related dates.
<b>Record Conditions</b>	Select this option to clone the record conditions for each set member.
<b>Related Records</b>	Select this option to attach related records for each set member to the cloned record.
<b>Status</b>	Select the status that you want to apply to the cloned records.
<b>Structure</b>	Select this option to clone the structure for each set member.
<b>Use Current Parcel Owner</b>	Select this option to clone the owner of the primary parcel to the record owner. If you do not select this option, Civic Platform clones existing record owners. Civic Platform clones licensed professionals and contacts based on specifications in the associated fields on the page.
<b>Workflow Status</b>	Select this option to clone the workflow status for each cloned set member.
<b>Workflow Task Specific Info</b>	Select this option to clone the workflow task-specific information for each set member.

## Record Creation Field Descriptions

The following fields are available by default when creating a new record for a set.

Table 57: Create Record Field Descriptions

<b>Create new Record SET</b>	Generates a new record set from the records created from the parcel set.
<b>New Record SET ID</b>	The Record SET ID for the new record set in this field. This field becomes enabled when you select the <b>Create new Record SET</b> option.
<b>Parcels, Addresses, or Owners Locked</b>	Use to define record creation parameters. Options are: <b>Include:</b> Generates records for all parcels independent of parcel or parcel address current conditions. <b>Exclude:</b> Generates records for all parcel set members except for parcels/parcel addresses with a lock condition applied). <b>Reject:</b> Generates records for all parcels set members except for parcels or parcel addresses with a 'Locked' condition applied.
<b>Pending or Disabled Parcels</b>	Use to define record creation parameters. Options are: <b>Include:</b> Generates records for all parcels independent of parcel or parcel address current status. <b>Exclude:</b> Generates records for all parcel set members except for parcels/parcel addresses with a status of Pending or Disabled. <b>Reject:</b> Generates records for all parcel set members except for parcels/parcel addresses with a status of Pending or Disabled.
<b>Permit Type</b>	Use to select the Permit Type required for the new Records.
<b>Rejected Parcels SET ID</b>	The Rejected Parcel Set ID name if you select the Reject option in the Parcels or Addresses with Locks field or the Pending or Disabled Parcels field. The rejected parcel set contains all the rejected parcels that were not used to generate records because of a condition or status.

## Payment Details for a Set

The following fields are available by default when working with payment details for a set.

Table 58: Payment Details for a Set

<b>Amount</b>	The total payment amount.
<b>Bank Name</b>	If you are receiving a credit card payment or check payment, this is the name of the bank that issued the credit card or check.
<b>CC Auth Code</b>	If you are receiving a credit card payment, this is the credit card number.
<b>CC Exp Date</b>	If you are receiving a credit card payment, this is the credit card's expiration date.
<b>CC Holder Name</b>	If you are receiving a credit card payment, this is the name of the credit card holder as it appears on the credit card.
<b>Check Holder's E-mail</b>	If you are receiving a check payment, this is the email address of the check holder.
<b>Check Holder's Name</b>	If you are receiving a check payment, this is the name of the check holder.
<b>Check Number</b>	If you are receiving a check payment, this is the check number.
<b>Check Type</b>	The check type. For example, company or personal.
<b>City</b>	The city of the payor.
<b>Comment</b>	Comments to help identify or explain the reason for this payment. If there are any special circumstances for this payment, indicate them here.
<b>Country/Region</b>	The country or region of the payor.
<b>Driver's License</b>	The drivers license number of the payor.
<b>Method</b>	The payment method. For example, choose Cash, Check, or Credit Card.
<b>Payor</b>	The name of the payor.
<b>Phone Number</b>	The phone number of the payor.
<b>Received</b>	The manner in which the payment was received. For example, In Person, Mail, or Fax.
<b>Reference #</b>	If you are receiving a check payment, this is the check number.
<b>State</b>	The state where the payor resides.
<b>Trust Account</b>	The number or code that identifies the terminal where you are accepting payment.
<b>Zip</b>	The zip code of the payor.

## Set Analysis Field Descriptions

The following fields are available by default for set analysis.

Table 59: Set Analysis Field Descriptions

<b>All Fees Paid</b>	The sum of all Record related fees with fully paid invoiced fee items.
<b>Fees Overpaid</b>	The sum of all Record related fees with fully paid invoiced fee items and unapplied credits.
<b>Fees Required</b>	The sum of all Record related fees with at least one unpaid invoiced fee item.
<b>Total Records</b>	The total number of Records in the selected set of sets.
<b>Total Fee Applied</b>	The sum of all the applied fees for Record set members.
<b>Total Fee Invoiced</b>	The sum of all invoiced fees for Record set members.
<b>Total Invoice Balance</b>	The difference between the amount of money invoiced and the amount of money applied: the balance due.
<b>Total Job Value</b>	The total job value for all Records.

## Payment Processing Fields

The following fields are available by default when processing payments for a set.

Table 60: Payment Processing Fields

<b>All Fees Paid</b>	The sum of all Record related fees with fully paid invoiced fee items.
<b>Cashier ID</b>	The ID number for the cashier conducting the session.
<b>Date</b>	The cashier session date.
<b>Set Member Records</b>	The total number of Record set members in the set of sets.
<b>Terminal #</b>	The terminal number for the current cashiering session.
<b>Total Balance</b>	The total balance for all set of set Record members less the total credits.
<b>Total Credits</b>	The total accumulated credits for all set of set Record members.
<b>Total Fee Applied</b>	The sum of all the records for which fees have been applied, or paid.
<b>Total Fee Assessed</b>	The sum of all assessed fees, including invoiced and non-invoiced fees, for each record member in the selected set of sets.
<b>Total Fee Invoiced</b>	The amount of all invoiced fees for each Record member in the set of sets
<b>Total Invoice Balance</b>	This column displays the difference between the invoiced fees and the applied, or paid, fees.
<b>Transactions</b>	Use the check boxes under this heading to select Set payments to void.
<b>Valuation</b>	The total job value for all Record set members.

## Fee Items Pay Fields

The following fields are available by default when paying fee items for a set.

Table 61: Fee Items Pay Fields

<b>Amount Per Record</b>	This is the amount you want to apply to each invoiced fee item for each Record member. When you enter an amount in this field, Civic Platform automatically calculates the Record count, Payment Amount, and Total.
<b>Record Count</b>	The total number of Records that will receive payment.
<b>Fee</b>	The total fee amount.
<b>Fee Code</b>	The code that indicates the type of fee assessed.
<b>Fee Item</b>	The description of the fee item.
<b>Outstanding</b>	The total outstanding balance on invoiced fee items for all Record members.
<b>Paid</b>	The total amount paid on invoiced fee items for all member Records.
<b>Payment Amount</b>	<p>This field is auto-populated based on the amount you enter in the Amount Per Record field.</p> <p>For example, if you have a Fire Code Inspection fee for two Records with an unpaid amount of \$100.00 and you enter \$50.00 in the Amount Per Record field, then the Record Count field indicates that the two Records will receive payment and the Payment Amount field displays \$100.00, which is the total amount to be applied: \$50.00 for each Record.</p> <p>If you have multiple Records with the same fee item and you apply less than invoiced amount, then Civic Platform applies the amount to the first Record in the list of Record set members; the amount is not split between the two Records.</p>
<b>Quantity</b>	The total number of invoiced fee items for Records in the selected set of sets.

## Apply Partial Payment Fields

The following fields are available by default when working with partial payments on a set.

Table 62: Apply Partial Payment Fields

<b>Apply Credit</b>	The is a credit amount to be applied to a specific invoice item. You can only enter credits in this field that are equal to or less than available credits.
<b>Apply Payment</b>	This field populates based on the Standard Choice FULL_PAY_ALLOCATION_OPTIONS. When the Standard Choice Value is set to Automatic, fees display and process based on priority. When the Standard Choice Value is set to Standard, fees display and process starting with the first on the list. The <b>Full Pay</b> button reallocates amounts in the Apply Credits and Apply Payments fields based on the Standard Choice settings.
<b>Available Credit</b>	This field displays available credit for each set of sets Record member with outstanding invoiced fee items.
<b>Fee</b>	The amount to be paid.
<b>Fee Code</b>	The code representing the type of fee assessed.
<b>Fee Item</b>	The description of the fee item.
<b>Invoiced Date</b>	The date the fee item was invoiced.
<b>Invoice #</b>	The fee item invoice number.
<b>Outstanding</b>	The unpaid amount on the invoiced fee item.
<b>Paid</b>	The amount paid towards the invoiced fee item.
<b>Payment Period</b>	The payment period for the invoiced fee item.
<b>Priority</b>	The priority level of the invoiced fee item.
<b>Quantity</b>	This field indicates the quantity of invoiced fee items for individual Records.
<b>Record ID</b>	The ID number for the Record with outstanding invoiced fee items.

## Fee Analysis Fields

The following fields are available by default when working with fee analysis on a set.

Table 63: Fee Analysis Field Descriptions

<b>Record ID</b>	This field displays the Record ID or Alternative ID for all Record members in the selected set of sets.
<b>Total Fee Applied</b>	The sum of the applied amounts for each Record member in the selected set of sets.
<b>Total Fee Assessed</b>	The sum of all assessed fees, including invoiced and non-invoiced fees, for each Record member in the selected set of sets.
<b>Total Fee Invoiced</b>	The amount of all invoiced fees for each Record member in the set of sets.
<b>Total Invoice Balance</b>	This column displays the difference between the invoiced fees and the applied, or paid, fees.

## Structures and Establishments

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Choose a topic from the list below to learn more about working with structures and establishments.

### **Related Information**

[Structures and Establishments Overview](#)

[Creating a Structure or Establishment](#)

[Viewing or Editing a Structure or Establishment](#)

[Deleting a Structure or Establishment](#)

[Activating an Inactive Structure or Establishment](#)

[Associating Reference Data to Structures and Establishments](#)

[Examining Structure and Establishment Details](#)

## Structures and Establishments Overview

---

A structure is a physical building or building improvement, such as a mall, an apartment complex, or an office building. You can set up structure records to track the relationships between structures and the addresses, parcels, and owners they have an association with, as well as the records they have a link to.

An establishment is an entity within a structure; for example, an individual store that leases space in a shopping mall. Establishments may have different APO data from the structures they occupy, so Civic Platform allows users to link address, parcel, and owner information to individual structure records and establishment records, enabling users to track the relationship between structures and establishments. Users can also associate applications to structure records and establishment records.

### Creating a Structure or Establishment

You can create a structure or establishment record as needed. This is particularly useful if your agency wants to track the different shops within a shopping mall or the various apartment owners within a large apartment building.

#### To create a structure or establishment

1. Navigate to the Structures and Establishments portlet.

Civic Platform displays the Structures and Establishments list portlet.

2. Click **New**.

Civic Platform displays a detail form.

3. Complete the following required fields:

**Group** Choose either Structure or Establishment.

**Type** Choose a structure type based on the group you selected.

Civic Platform displays a portlet containing the fields associated with the Group and Type you selected.

4. Complete the form with available data. See [Structure and Establishment Fields](#) for field definitions.

5. Click **Submit**.

Civic Platform creates the structure or establishment.

### Viewing or Editing a Structure or Establishment

1. Navigate to the Structures and Establishments portlet.

Civic Platform displays the Structures and Establishments list portlet.

2. Click **Search**.

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

Civic Platform returns a list of structures and establishments meeting your search criteria.

4. Click the hyperlinked name of the structure or establishment record you want to view.

Civic Platform displays the appropriate structure or establishment record detail.

5. Modify fields as needed. See [Structure and Establishment Fields](#) for field definitions.

6. Click **Save**.

## Deleting a Structure or Establishment

When you delete a structure or establishment, Civic Platform preserves the record and its information but sets its status to Inactive. You can still search for the record, edit it, and activate it, and the deleted records are still accessible under the records that are using them.

If you want to delete a structure that has establishments associated to it, Civic Platform will ask if you want to delete the structure only or the structure and its associated establishments.

### To delete a structure or establishment

1. Navigate to the **Structures and Establishments** portlet.

Civic Platform displays the Structures and Establishments list portlet.

2. Click **Search**.

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

Civic Platform returns a list of structures and establishments meeting your search criteria.

4. Select the structure or establishment you want to delete.

5. Click **Delete**.

If you have chosen to delete a structure that has one or more establishments associated to it, a dialog box displays, asking if you want to delete the structure and its associated establishments.

Click **Yes** to delete the structure and establishments. Click **No** to delete only the structure.

Civic Platform deletes the selected object(s).

## Activating an Inactive Structure or Establishment

When you delete a structure or establishment record, both the record and its information are saved in the database with status = Inactive. You can search for and re-activate a deleted structure or establishment record.

### To reactivate an inactive structure or establishment

1. Find the structure or establishment you want to reactivate. See [Viewing or Editing a Structure or Establishment](#) for instructions.

Civic Platform returns a list of records that match your search criteria.

2. Click the hyperlinked name of the desired structure or establishment.

Civic Platform displays the Structure or Establishment detail portlet.

3. Set the **Status** field to **Active**.

Civic Platform reactivates the object and adds it to your Structures and Establishments list portlet.



## Associating Reference Data to Structures and Establishments

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Once you have created structure and establishment records, you can associate reference data to them. Address, Parcel, and Owner data are necessary for managing and maintaining properties, and you can attach APO data to structure and establishment records.

You can also associate structure and establishment records to one another. If your agency is managing a mall structure, for example, you can associate all the establishment records for the stores contained in the mall to the mall structure record. You can perform this association task in either the structure or the establishment record.

Your agency can configure Civic Platform so that when a structure is associated to an establishment, or an establishment to a structure, the APO data associated to that structure or establishment are automatically added to the associated structure or establishment. Once the two records are associated, however, APO data are added and removed independently for the structure and establishment. Adding or removing data from one will not affect the data contained in the other.

### Topics

- [Adding a Condition](#)
- [Removing a Condition](#)
- [Associating a Parcel](#)
- [Removing a Parcel](#)
- [Associating an Address](#)
- [Removing an Address](#)
- [Associating an Owner](#)
- [Removing an Owner](#)
- [Associating a Record](#)
- [Removing a Record](#)
- [Associating a Structure or Establishment](#)
- [Removing a Structure or Establishment](#)
- [Associating Structures and Establishments to Records](#)

### Adding a Condition

A condition is a requirement surrounding a structure or establishment. It displays in the record to show that some requirement has not been met. You can configure a condition to lock or hold a record or to provide a notice. For example, you may want to notify users when a scheduled inspection has not been completed. For detailed information on conditions, see [Conditions](#).

You can create a new condition for the structure or establishment or use a standard condition associated to the structure and establishment group or type.

#### To add a new condition to a structure or establishment

1. Find and open the structure or establishment record for which you want to associate a condition. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Conditions tab.

3. Click **New**.

Civic Platform displays the New Condition portlet.

4. Complete the fields with available data. See [Conditions Form Fields](#) for field definitions.

5. Click **Submit**.

Civic Platform applies the standard condition and displays the conditions for the selected application or application component on the tab.

### To add a standard condition to a structure or establishment

1. Find and open the structure or establishment record for which you want to associate a condition. See [Viewing or Editing a Structure or Establishment](#).

2. Click the Conditions tab.

3. Click **New**.

Civic Platform displays the New Condition portlet. Depending on your administrator's settings, some of the available fields may display the **Standard Condition** hyperlink and data picker.

Structure ID: 13-STR-00002

Menu Submit Reset Cancel Help

Detail Conditions Parcels Addresses Owners Records Structures & Establishments

Group \* [Standard Condition](#)

Status Date

Applied Date 01/30/2013

Short Comments [Standard Comment](#)

[check spelling](#)

Type \* [Standard Condition](#)

Severity --Select--

Effective Date

Applied by Dept \* [Current Department](#)

CDD-Administration

Action by User [Current User](#)

--Select--

Status Applied(Applied)

Condition Name \*

Expiration Date

Applied by User \* [Current User](#)

Admin User

Action by Dept [Current Department](#)

--Select--

4. Click the **Standard Condition** hyperlink.

Civic Platform displays the Standard Condition search portlet.

5. Enter search criteria, then click **Submit**.

Civic Platform returns a list of standard conditions that match your search criteria.

6. Click the button next to the standard condition you want to attach to the structure or establishment.

Civic Platform auto-populates the New Condition form with the values from the standard condition you selected.

7. Click **Submit**.

Civic Platform adds the condition to the record.

### Removing a Condition

1. Find the structure or establishment from which you want to remove a condition. See [Viewing or Editing a Structure or Establishment](#).

2. Click the Conditions tab.

Civic Platform displays the Structures and Establishments portlet.

3. Select the condition you want to remove.

#### 4. Click **Delete**.

Civic Platform removes the condition from the record.

## Associating a Parcel

Associating a parcel to a structure is different than associating a parcel to an establishment. When an establishment is associated to a structure, for example a clothing store located in a mall, that establishment cannot occupy a parcel of land not occupied by the structure. So while you can associate any parcel to a structure record, you are limited in the parcels you can associate to an establishment.

### Topics

- [Associating a Parcel to a Structure](#)
- [Associating a Parcel to an Establishment](#)

## Associating a Parcel to a Structure

You can associate any parcel record to a structure record. You are not limited by any associated establishments.



### Note:

Depending on your agency's settings, any parcel record associated to a structure populates in or is removed from a record when an associated structure is added to or deleted from the record. The information can be added or removed either automatically or following a prompt. This is controlled by agency settings, so contact your agency administrator if you have questions about synchronizing reference data.

---

### To associate a parcel to a structure

1. Find the structure or establishment to which you want to associate a parcel. See [Viewing or Editing a Structure or Establishment](#).
2. Click the **Parcels** tab.
3. Click **Look Up**.  
Civic Platform displays the Parcel Look Up portlet.
4. Enter search criteria as needed then click **Submit**.  
Civic Platform returns a list of parcels that match your search criteria.
5. Select the parcel(s) you want to associate to the structure or establishment.
6. Click **Select**.
7. Click **Submit**.  
Civic Platform adds the parcel(s) to the structure or establishment record.

## Associating a Parcel to an Establishment

When an establishment is associated to a structure, you can only add the structure's parcel information to the establishment record. When an establishment is associated to more than one structure, you can choose which structure to select parcel information from.

**Note:**

Depending on your agency's settings, any parcel record associated to a structure populates in or is removed from a record when an associated structure is added to or deleted from the record. The information can be added or removed either automatically or following a prompt. This is controlled by agency settings, so contact your agency administrator if you have questions about synchronizing reference data.

To add a parcel to an establishment not associated to a structure, see [Associating a Parcel to a Structure](#).

**To associate a parcel to an establishment**

1. Find the establishment to which you want to associate a parcel. See [Viewing or Editing a Structure or Establishment](#).
2. Click the **Parcels** tab.
3. Click **Look Up**.
  - If the establishment is associated to multiple structures, Civic Platform displays the structure(s) to which the establishment is associated.
    1. Select the structure with the parcel information you want to import.
    2. Click **Select**.

Civic Platform displays the parcels associated to that structure.
  - If the establishment is associated to one structure, Civic Platform displays the list of parcels associated to that structure.
  - If the establishment is not associated to a structure, follow the procedure described in [Associating a Parcel to a Structure](#).
4. Select the parcel(s) you want to associate to the establishment record.
5. Click **Select**.

Civic Platform adds the parcel information to the establishment record.

**Removing a Parcel**

1. Find the structure or establishment to which you want to associate a parcel. See [Viewing or Editing a Structure or Establishment](#).
2. Click the **Parcels** tab.
3. Select the parcel you want to remove.
4. Click **Delete**.

Civic Platform removes the parcel from the structure or establishment record.

**Associating an Address**

When an establishment is associated to a structure, you can only add the addresses associated to the structure to the establishment. Any address can be associated to a structure or to an establishment not associated to a structure.

**Note:**

Depending on your agency's settings, any address record associated to a structure or establishment populates in or is removed from a record when the associated structure or establishment is added to or deleted from the record. The information can be added or removed either automatically or following a prompt. This is controlled by agency settings, so contact your agency administrator if you have questions about synchronizing reference data.

**Topics**

- [Associating an Address to a Structure](#)
- [Associating an Address to an Establishment](#)

**Associating an Address to a Structure**

1. Find the structure to which you want to associate an address. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Address tab.  
Civic Platform displays the Addresses portlet.
3. Click **Look Up**.
4. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform returns a list of addresses that match your search criteria.
5. Select the addresses you want to associate with the structure.
6. Click **Select**.  
Civic Platform adds the address to the structure.

**Associating an Address to an Establishment**

When an establishment is associated to a structure, you can only add the address information associated to that structure to the address. If the establishment is associated to multiple structures, you can choose which structure's address information to add to the establishment.

To add a parcel to an establishment not associated to a structure, complete the tasks described in [Associating an Address to a Structure](#).

**To associate an address to an establishment**

1. Find the establishment to which you want to associate an address. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Address tab.  
Civic Platform displays the Addresses portlet.
3. Click **Look Up**.
  - If the establishment is associated to multiple structures, Civic Platform displays the structure(s) to which the establishment is associated.
    1. Select the structure with address information you want to import.
    2. Click **Select**.  
Civic Platform displays the addresses associated to that structure.

- If the establishment is associated to one structure, Civic Platform displays the list of addresses associated to that structure.
  - If the establishment is not associated to a structure, follow the procedure described in [Associating an Address to a Structure](#).
4. Select the addresses you want to associate with the establishment record.
  5. Click **Select**.  
Civic Platform adds the address information to the establishment record.

## Removing an Address

1. Find the structure or establishment from which you want to remove an address. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Address tab.  
Civic Platform displays the Addresses portlet.
3. Select the address you want to remove.
4. Click **Delete**.  
Civic Platform removes the address from the structure or establishment.

## Associating an Owner

1. Find the structure or establishment to which you want to associate an owner. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Owner tab.  
Civic Platform displays the Owners portlet.
3. Click **Look Up**.
4. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform displays a list of owners that match your search criteria.
5. Select the owner(s) to be added to the structure or establishment record.
6. Click **Select**.  
Civic Platform adds the owner(s) to the structure or establishment record.

## Removing an Owner

1. Find the structure or establishment from which you want to remove an owner. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Owner tab.  
Civic Platform displays the Owners portlet.
3. Select the owner you want to remove from the structure or establishment.
4. Click **Delete**.  
Civic Platform removes the owner from the structure or establishment.

## Associating a Record

You may want to associate records to your structure and establishment records to keep track of pending applications or inspections.

### To associate a record to a structure or establishment

1. Find the structure or establishment to which you want to associate a record. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Records tab.
3. Click **Look Up**.
4. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform displays a list of owners that match your search criteria.
5. Select the record you want to add to the structure or establishment record.
6. Click **Select**.  
Civic Platform adds the record(s) to the structure or establishment record.

## Removing a Record

1. Find the structure or establishment from which you want to remove a record. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Record tab.
3. Select the record you want to remove from the structure or establishment.
4. Click **Delete**.  
Civic Platform removes the record(s) from the structure or establishment.

## Associating a Structure or Establishment

In order to track complex properties that contain multiple establishments, you can create structures and associate multiple establishment records to them or vice versa. You can only associate structures and establishments, however; you cannot associate structures to structures or establishments to establishments.

Depending on your agency's settings, APO data associated to an establishment may populate a structure when the establishment is associated to it. This may occur automatically or you may be prompted to allow it.

### To associate a structure or establishment

1. Find the structure or establishment to which you want to associate another structure or establishment. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Structures & Establishments tab.  
Civic Platform displays the Structures and Establishments portlet.
3. Click **Look Up**.
4. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform returns a list of structures or establishments that match your search criteria.
5. Select the structure or establishment you want to associate.

## 6. Click **Select**.

Civic Platform adds the structure(s) or establishment(s) to the structure or establishment record.

The screenshot shows a web interface for a structure record. At the top, it displays 'Structure ID: 12-STR-00003' and a 'Menu' dropdown with buttons for 'Look Up', 'Delete', and 'Help'. Below this are several tabs: 'Detail', 'Conditions (0)', 'Parcels (1)', 'Addresses (1)', 'Owners (1)', 'Records (4)', and 'Structures & Establishments (1)'. A red message states '1 record(s) added successfully.' Below the message is a table with the following data:

ID	Name	Group	Type	Status	Status Date	Land Use	Total Floor Area	Description	Record Status
<a href="#">12-ESB-00003</a>	Establishment Test	ESTABLISHMENT	Establish...		11/21/2012				Active

## Removing a Structure or Establishment

Deleting an establishment associated to a structure or a structure associated to an establishment does not delete the record or its information from the database. Rather, it deletes the relationship between the two records. You can still search, edit, and associate the deleted structure or establishment record.

### To remove a structure or establishment

1. Find the structure or establishment to which you want to associate another structure or establishment. See [Viewing or Editing a Structure or Establishment](#).
2. Click the Structures & Establishments tab.  
Civic Platform displays the Structures and Establishments portlet.
3. Select the structure or establishment you want to remove.
4. Click **Delete**.  
Civic Platform removes the structure(s) or establishment(s).

## Associating Structures and Establishments to Records

Users may want to associate structures or establishments directly to an existing record or to a new record. You can do this either through the record or through the Application Intake Form.

For information on completing the Structures and Establishments sections of the application form, see [Working in the Structures or Establishments Section](#).

### To add structures and establishments from a record

1. From the Record list portlet, select the record you want to work with.  
The Record detail portlet displays.
2. Click the Structures and Establishments tab
3. Click **Look Up**.
4. Enter search criteria as appropriate, then click **Submit**.  
Civic Platform returns a list of structures and/or establishments matching your search criteria.
5. Select the structures and/or establishments you want to associate to the record.
6. Click **Select**.  
Civic Platform adds the structure(s) and/or establishment(s) to the record.  
If there are conditions applied to any of the selected structures or establishments, Civic Platform displays them in a pop-up window.



## Examining Structure and Establishment Details

The following table lists and define the default fields available in the different interfaces you will encounter when working with structures and establishments.

### Structure and Establishment Fields

This table lists and defines the default fields that may be available to you as you work with structure and establishment records.

Table 64: Structure and Establishment Fields

<b>Group</b>	This is the group of objects you want to work with.
<b>Type</b>	This is the type of structure or establishment (depending on which group is selected). Each type has attribute fields associated with it that display when you select that type.
<b>ID</b>	This is the ID number of the structure or establishment.
<b>Name</b>	This the name of the structure or establishment.
<b>Status</b>	This is the status of the structure or establishment. Options vary by agency.
<b>Status Date</b>	This a date range during which the structure or establishment you are searching for had a specified status.
<b>Land Use</b>	This defines how the land is used. Options vary by agency.
<b>Description</b>	This is a narrative description of the structure or establishment.
<b>X Coordinate</b>	The location of the structure or establishment on the horizontal axis of a land grid, if your agency uses this type of mapping.
<b>Y Coordinate</b>	The location of the structure or establishment on the vertical axis of a land grid, if your agency uses this type of mapping.
<b>Height</b>	The height of the structure or establishment.
<b>Date Built</b>	A date range during which the structure or establishment you are searching for was built.
<b>Front Dimension</b>	The dimensions of the structure or establishment's facade.
<b>Rear Dimension</b>	The dimensions of the structure or establishment's rear surface.
<b>Side Dimension 1</b>	The dimensions for one of the structure or establishment's side surfaces.
<b>Side Dimension 2</b>	The dimensions for one of the structure or establishment's side surfaces.
<b>Total Floors</b>	The number of floors in the structure or establishment.
<b>1st Floor Area</b>	The total area of the first floor of the structure or establishment.
<b>Total Floor Area</b>	The total area of all the floors in the structure or establishment.
<b># of Rooms</b>	The total number of rooms in the structure or establishment.
<b>Baths</b>	The total number of bathrooms in the structure or establishment.
<b>Beds</b>	The total number of bedrooms in the structure or establishment.
<b>Garage</b>	This indicates whether the structure or establishment has garage facilities.
<b>Pool</b>	This indicates whether the structure or establishment has a swimming pool.
<b>Floor</b>	The floor number on which the structure or establishment is located.
<b># of Employees</b>	The total number of employees of the structure or establishment.
<b># of Residential Units</b>	The total number of residential units in the structure or establishment.
<b>% of Structure</b>	The percentage of the structure's area taken up by the establishment.

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<b>Parcel(s) Area</b>	The area of the parcel or parcels taken up by the structure or establishment.
<b>% of Parcel(s) Area Used by Structure</b>	The percentage of the parcel or parcels occupied by the structure.
<b>Record Status</b>	The status of the record. Options include <b>Active</b> or <b>Inactive</b> .

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# Time Accounting Tracker

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Choose a topic from the list below to learn more about working with time accounting.

## **Related Information**

[Time Accounting Overview](#)

[Creating a Time Accounting Record](#)

[Examining the Time Accounting Details](#)

## Time Accounting Overview

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Use the Time Accounting module to track the amount of time spent in performing your daily tasks, the descriptions and costs of materials used while performing those tasks, and the usage of vehicles related to the tasks performed.

Time Accounting information is captured in two contexts.

- Time and materials that are required to process applications. As employees log their activity in the time accounting tracker, the agency can calculate the fees and charges and apply them to the application in “real time”. For example, an agency can track the time a user spends on a particular process or group of processes.
- Agencies can record costs relating to time and materials that are not directly related to processing any specific information. This information is entered for reporting purposes only.

Users access to functionality is set by the agency administrator. There are three user levels: administrator, supervisor, and user. Users with administrator privileges can view and edit any records for which any other user has access. Supervisors can view and edit any records within their user group. Users without administrator or supervisor privileges can only view or edit their own records.

The Access Mode column allows the administrator to inform the current user what type of access the user has to each time an entry type displayed in the list. Valid values are:

- |           |  |
|-----------|--|
| <b>N</b>  | User cannot delete or make changes to the entry.   |
| <b>D</b>  | User may delete this entry.  |
| <b>E</b>  | User can make changes to any of the fields that are not displayed as read-only.                          |
| <b>DE</b> | The user may delete this entry or make changes to any of the fields that are not displayed as read-only. |

## Creating a Time Accounting Record

You can create a new time accounting record for each application. You can create records for multiple applications at one time. For example, an inspector completes four electrical inspections, and enters the documentation for all four at one time.

You can access the time accounting portlet from the home page, or from an entity (for example, a record, or a condition assessment).

### To create a Time Accounting record

1. Open the Time Accounting portlet using one of the following approaches:

- Navigate to the Time Accounting portlet.



#### Note:

If you want to add time accounting for inspections or workflow with the enhanced time tracker feature, you must take this approach. The workflow or inspection portlet only allows you to record the time spent.

- Navigate to the record portlet, open the record you want to add time accounting, and then click the **Time Accounting** button in the Record tab.
- Navigate to the Record portlet, open the detail form for an activity in a record, and then click the **Time Accounting** button.
- Navigate to the Condition Assessment portlet, open the condition assessment you want to add time accounting, and then click the **Time Accounting** button in the Detail tab.
- Navigate to the Work Order portlet, go to the Work Order Task tab, and click the link in the **Time Accounting** column at a work order task.

2. Click **New**.

Civic Platform displays the time accounting entry form.

Submit
Reset
Add
Delete
Help

Select All

User ID ✕

Date Logged \*

Created By

Created Date

Entity Type

Reference Record \*

Entity

Time Accounting Group \*

Time Accounting Type \*

Start Time AM/PM Current Time

End Time AM/PM Current Time

Billable \*

Time Elapsed \*

Hourly Rate \*

Start Miles

Percent \*

Detail Time Elapsed

No Pay:

Regular Time Time:

Overtime:

Holiday:

Christmas:

Cost \*

End Miles

Total Miles

Notation

[check spelling](#)

Vehicle ID

Materials

Cost Of Materials

Equipment/Materials [Add](#) [Remove](#)

<input type="checkbox"/> Cost Type *	Cost Item *	Unit Rate1	Quantity9	Unit of Measure	Fixed Rate	Cost Date
0 record(s) found.						

3. Complete the fields with available data. See [Time Accounting Fields](#) for field definitions.

4. As necessary and if available, you can directly add equipment costs and material costs that occurred during the time accounting period.

a. Click **Add** in the Equipment/Materials section.

Civic Platform adds a new row to the list of equipment/materials cost.

Equipment/Materials [Add](#) [Remove](#)

<input type="checkbox"/>	Cost Type *	Cost Item *	Unit Rate	Quantity	Unit of Measure	Fixed Rate	Cost Date	Cost
<input type="checkbox"/>	--Select--	--Select--		No Pay	--Select--		12/03/2013	

b. Complete the fields with available data. See [Equipment and Material Cost Fields](#) for a list of fields and definitions.

c. Click either **Add** to add more rows, or select a row and click **Remove** to remove it.

5. To add another record, click **Add**, and repeat steps 3 and 4.

Civic Platform adds another time accounting record in the detail portlet.

6. Select the records you want to save, and click **Submit**.

Civic Platform saves the time accounting records.

## Examining the Time Accounting Details


The table below lists and defines the fields that may be available on the Time Accounting portlet. Fields are listed in alphabetical order (default names are used).

### Topics

- [Time Accounting Fields](#)
- [Equipments and Material Cost Fields](#)

### Time Accounting Fields

Table 65: Time Accounting Fields

<b>Billable</b>	Defines whether the agency can bill for this type.
<b>Cost</b>	<p>If you set 0 or empty in Hourly Rate, you can enter a value for this Cost field. If there is no time value in Detail Time Elapsed, Civic Platform calculates the cost with the following formula:</p> $\text{Cost} = \text{Hourly Rate} * \text{Percent} * \text{Time Elapsed}$ <p>If you specify time value in Detail Time Elapsed, Civic Platform calculates the cost with this formula:</p> $\text{Cost} = \text{Hourly Rate} * \text{Percent} * (\text{Cost Factor \#1} * \text{Detail Time Elapsed \#1} + \text{Cost Factor \#2} * \text{Detail Time Elapsed \#2} + \dots + \text{Cost Factor \#n} * \text{Detail Time Elapsed \#n})$
<b>Cost of Materials</b>	The total cost for the materials used.
<b>Created By</b>	The agency user who added the record. Read-only field.
<b>Created Date</b>	The date when you created the record. Read-only field.
<b>Date Logged</b>	The date that the time accounting record is logged.
<b>Detail Time Elapsed</b>	<p>The time spent by cost factors for the time accounting.</p> <p> <b>Note:</b> Civic Platform validates that the total time given to each cost factor is equal to the time in the Time Elapsed field.</p>
<b>End Miles</b>	The number listed on the odometer on the agency vehicle at the end of your use.
<b>End Time</b>	The time in the End Time fields that you finished work on the application. The application validates that the elapsed time equals to the difference between the start and end time.
<b>Entity</b>	The actual entity (activity, condition assessment, inspection, workflow, or work order task) you are creating the time accounting record for.
<b>Entity Type</b>	The entity type. If none of the options are applicable, select N/A.
<b>Hourly Rate</b>	The hourly rate, according to the user's profile. The user can enter a positive or negative value. If the user has access to edit the field, the rate specified by the agency for the Time Accounting type displays. If the field is read-only, the default value is 0.0.
<b>Materials</b>	The materials used for this application.
<b>Notation</b>	Comments about the application.
<b>Percent</b>	The percentage point for calculating the cost. 50 stands for 50%, 80 stands for 80%, and 150 stands for 150%. Specially, both 0 and 100 stand for 100%.

<b>Reference Record</b>	The reference record for which you create the time accounting. You can further select the actual entity (activity, workflow, and so forth) in the Entity field. Leave the field as N/A if no reference record is applicable.
<b>Start Miles</b>	The number listed on the odometer on the agency vehicle at the beginning of your use.
<b>Start Time</b>	The Start Time fields that you began work on the application. The application validates that the elapsed time equals to the difference between the start and end time.
<b>Time Accounting Group</b>	The time accounting groups which the user(s) in the User ID field has permission to view or edit.
<b>Time Accounting Type</b>	The time accounting types within the selected time accounting group which the user(s) in the User ID field has permission to view or edit.
<b>Time Elapsed</b>	The time that you want to log for the time accounting. If you enter the Start Time and End Time, the total time between the recorded Start and End times automatically populates in this field.
<b>Total Miles</b>	The number of miles logged on the agency vehicle you used during this application.
<b>User ID</b>	The user identification for the individual you are creating the time accounting for. If you select multiple users in the field, you can only select a time accounting type from the Time Accounting Type field that applies to all the selected users. When you submit the time accounting entry, Civic Platform saves the same entry for all users.
<b>Vehicle ID</b>	Select the identification number from the drop-down list for agency vehicles used during this activity. Users can only enter Vehicle IDs if the vehicle was not used for activities related to a specific Time Accounting type.

## Equipments and Material Cost Fields

Table 66: Equipment and Material Cost Fields

<b>Cost</b>	The field is read-only. Civic Platform automatically calculates the cost according to the formula below:  $\text{Total Cost} = \text{Fixed Rate} + \text{Unit Rate} * (\text{Cost Factor \#1} * \text{Quantity \#1} + \text{Cost Factor \#2} * \text{Quantity \#2} + \dots + \text{Cost Factor \#n} * \text{Quantity \#n})$
<b>Cost Item</b>	The cost item.
<b>Cost Date</b>	The date when the cost occurred.
<b>Cost Type</b>	The appropriate cost type, such as: contract, employee, materials.
<b>Fixed Rate</b>	The fixed cost amount to use for the cost item, identified with the unit of measure as hours, dollars, and so forth. The field can display a default unit rate that your agency administrator configured. You can change the value as needed.
<b>Quantity</b>	The quantity of items, by cost factors, included in this cost item. The field displays only one cost factor by default, which is the default cost factor of the cost item, or the first cost factor configured in the Standard Choice COST_FACTOR where no default cost factor exists. You can click the down arrow below the cost factor field to view more cost factors, and enter values for one or more cost factors.
<b>Unit of Measure</b>	The unit of measure for the cost item.
<b>Unit Rate</b>	The unit cost amount to use for the cost item. The field can display a default unit rate that your agency administrator configured. You can change the value as needed.



# Assets

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Choose a topic from the list below to learn more about working with assets.

## **Related Information**

[Asset Overview](#)

[Examining Asset Details](#)

[Creating a New Asset](#)

[Viewing Assets](#)

[Updating Asset Details](#)

[Setting an Asset Display Image](#)

[Printing an Asset](#)

[Cloning an Asset](#)

[Managing Associated Parts](#)

[Managing Linked Assets](#)

[Viewing the Asset Condition Assessment History](#)

[Viewing PM Schedules for an Asset](#)

[Managing Asset Usage](#)

[Managing Asset Depreciation Values](#)

[Managing Asset Cost Rates](#)

[Working with Asset Conditions](#)

[Working with Asset Ratings](#)

[Managing Asset Contacts](#)

[Working on the Asset Calendar](#)

## Asset Overview

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Assets can be any object that an agency owns or maintains, such as fire hydrants, valves, manholes, street signs, trucks, desks, buildings, parking lots, and telephone lines.

When managing assets, you might need to schedule a truck with an aerial lift, identify the fire hydrants that are due for maintenance, inventory the office equipment, or respond to a request for street signs in a new subdivision.

There are three classifications of assets:

- Lines are assets connected to a node. Examples of lines are water lines, electrical wires, sidewalks, roads, curbs, gutters, telephone wires, and utility tunnels beneath city streets. Lines stretch through your agency connecting nodes.
- Nodes are assets that connect the lines in an agency. Nodes include hydrants, joints in water lines, electrical substations, sewer drains, manholes, traffic lights at intersections, and other elements that connect the lines in your agency.
- Components are assets that are free of lines and nodes. Rather than connecting other assets together, they are often independent or mobile objects such as buildings, vehicles, tools, and equipment.

The first step to working with any asset is to create or locate its record in Civic Platform. Once you have the asset you want to work with, you can calculate its depreciation values, schedule preventive maintenance, submit a work order, or do any other tasks with the asset.



**Note:**

A work order is the basic record used in Civic Platform. A Work Order ID is the work order identification number. The term record may be used in place of work order.

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Your Civic Platform environment and the tasks you perform depend on your agency's implementation package and the way your agency administrator sets up Civic Platform, including access permissions assigned to your Accela User Name.

## Creating a New Asset

You may need to create a new asset in Civic Platform when your agency acquires any new equipment or asset. There are several components that may apply to an asset, including linked assets, addresses, work orders, associated files, and details about the asset itself.

Your system administrator determines which fields are available for each asset that you create. These fields vary as much as assets vary. You may have fields for length, width, diameter, and material for pipes and water line material. Other fields may be more appropriate for a building or a vehicle.

When you create an asset, be certain that you put it in the right group with similar assets. There are three classifications of assets:

- **Lines** include water lines, electrical wires, sidewalks, roads, curbs, gutters, telephone wires, and utility tunnels beneath city streets. Lines stretch through your agency connecting nodes.
- **Nodes** include hydrants, joints in water lines, electrical substations, sewer drains, manhole covers, traffic lights at intersections, and other elements that connect the lines in your agency.
- **Components** are assets that are free of lines and nodes. Rather than connecting other assets together, they are often independent or mobile objects such as buildings, vehicles, tools, and equipment.

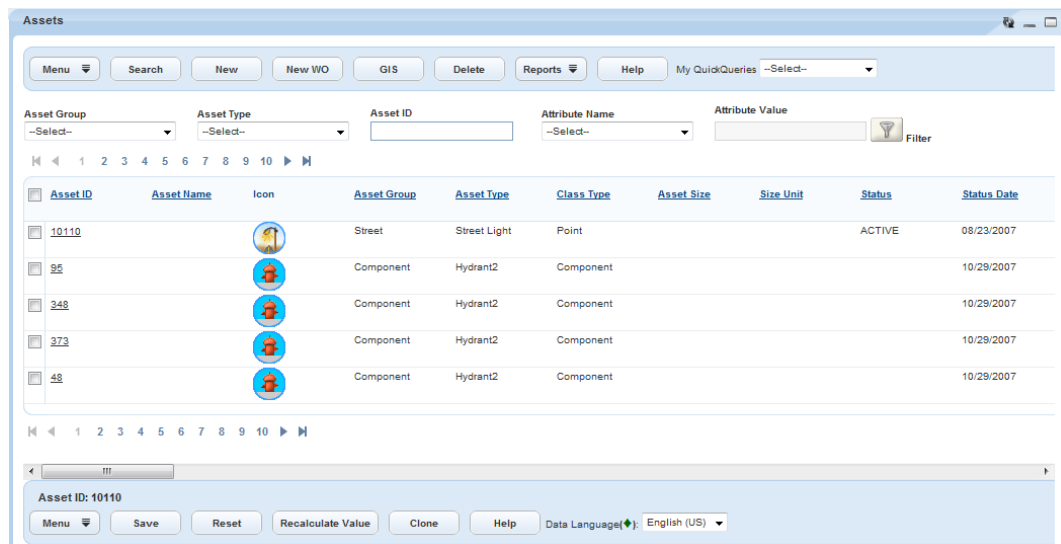
Depending on your setup, you may be able to search for information that you want to enter on a new asset. For example, you may be able to search existing assets rather than manually entering asset information.

You can specify the value for an asset and then start to track its depreciations. For information on asset depreciation calculation, see [Managing Asset Depreciation Values](#).

### To create an asset

1. Navigate to the Assets portlet.

Civic Platform displays the Asset list portlet.



2. Click **New**.

Civic Platform displays the new asset detail form below the list portlet.

3. Choose Asset Group, followed by Asset Type.

Civic Platform displays the fields that apply to the asset.

4. To calculate depreciation value, complete the fields: start value, date of service, useful life, and salvage value.

5. Complete the fields with available data.
6. Click **Save**.  
Civic Platform updates the Asset list portlet.

## Viewing Assets

You can quickly access assets from the asset list portlet, and view the details of each asset from this list by selecting the Asset ID. To view additional information on the asset such as addresses, work orders, linked assets, attached documents, preventative maintenance schedules, usages, conditions, condition assessments, ratings, and associated parts, use the record tabs available after selecting the asset.

The screenshot shows the 'Assets' portlet interface. At the top, there are buttons for Menu, Search, New, New WO, GIS, Delete, View Log, and Help. Below these are filters for Asset Group, Asset Type, Asset ID, Attribute Name, and Attribute Value. A table lists assets with columns for Asset ID, Asset Name, Icon, Asset Group, Asset Type, Class Type, Asset Size, Size Unit, Status, and Status Date. The asset 'FH-00002' is highlighted. Below the table, the 'Asset ID: FH-00002' is displayed, and a set of 'Record Tabs' includes Asset Detail, Address (0), Work Order (0), Linked Assets, Documents (0), PM Schedules (0), Condition (0), and Condition Assessment. The 'Asset Detail' tab is active, showing fields for Asset Group, Asset Type, Class Type, Status, and Status Date.

Asset ID	Asset Name	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
<a href="#">FH-00002</a>			Water	Fire Hydrant	Point			In Service	01/31/2012
<a href="#">SM-00003</a>			Sewer	Main	Linear	20	Feet	In Service	01/31/2012
<a href="#">SL-0002</a>			Street	Light	Point			In Service	01/31/2012

**Figure 21: Asset List and Detail Portlet**

- A **Asset ID link.** Click the link to the Asset ID of the asset you want to view.
- B **Asset ID.** The Asset ID displays at the top of the asset details portlet.
- C **Record tabs.** Data is organized in tabs. You can click any tab to see that data.

### To view assets

1. Navigate to the Assets portlet and use Search to locate the asset record you want to view. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. To update an asset, see [Updating Asset Details](#).

## Searching for an Asset

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An agency may have thousands of assets. You can quickly filter your assets list by selecting your asset group and asset type from the drop-down menus in the Asset List portlet and clicking the Filter button. Or, use a search to enter any information that you know about the asset.

Civic Platform allows you to search assets by asset details, asset addresses, associated work order details, as well as rating types and attribute fields associated to your selected asset type. If you want to view the list of fire hydrants around a school, you may begin your search by identifying the asset type as Hydrant. Since you know the location of the school, you could enter the city, zip code, street, and any other fields narrowing the search.

If you lack the asset detail information, but want to get all the assets that have due work orders in the next week, you just enter the work order scheduling details and perform the asset search.

### To search for an asset

1. Navigate to the Assets portlet.

Civic Platform displays the Asset list portlet.

2. To quickly filter your list, use the **Asset Group**, **Asset Type**, **Asset ID**, **Attribute Name**, and **Attribute Value** drop-down menus at the top of the page to filter the list of assets.

Select a value from one or more of the drop-down lists and click **Filter**.

Civic Platform returns a list of assets that match your filter criteria.

3. To perform a search, click **Search**.

Civic Platform displays the Asset Search portlet.

The available search fields are a combination of asset detail fields, address fields and work order fields. After you select an asset type, the rating types and attribute fields associated to the asset type also display as search fields at the end of the page.

You can choose what fields to display and group the fields as necessary with the Edit View feature. For more information on Edit View, See [Editing Your View](#).

4. Complete any of the fields that display.

For a description of the asset detail fields, see [Asset Fields](#).

For a description of the address fields, see [Table 85: Address Fields](#).

For a description of the work order fields, see [Work Order Fields](#).

5. After you enter all the desired search parameters, click **Submit**.

Civic Platform returns a list of all assets that match your search criteria.

If you specify some work order fields as the search criteria, Civic Platform returns a list of all assets that associate with the specified work orders.

## Updating Asset Details

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You have the options to update asset details individually or as a group. If you select several assets and request to update them as a group, you can only update the fields that are common to all the selected asset types.

### Topics

- [Updating a Single Asset](#)
- [Updating Multiple Assets](#)

### Updating a Single Asset

You can update asset details as necessary. For example, update the last service date of a vehicle, or modify the speed or capacity of a computer after its upgrade. You may also change the address of an asset.

#### To update a single asset

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Asset Detail tab.
3. Complete the fields with available data. See [Asset Fields](#) for field definitions.
4. Click **Save**.  
Civic Platform saves your information and refreshes the asset list so that it reflects the changes.

### Updating Multiple Assets

Occasionally, you may find that you need to update several assets with the same information. For example, several streetlights, or a variety of assets in different parts of town may all be put into service on the same day. Civic Platform allows you to save time and improve data accuracy by updating a group of assets at once.

#### To update group asset details




1. Navigate to the Assets portlet and use Search to locate the assets that need to be updated (see [Searching for an Asset](#)).  
Civic Platform displays a list of assets matching your search criteria.
2. Select the assets you want to update. You may select assets of the same type, or of different types.
3. Hover your mouse on **Menu** to display a command menu, then select **Group Update**.

**Assets**

Menu Search New New WO GIS Delete View Log Help

Customize Content  
 CSV Export  
 My QuickQueries  
 Expand List  
 Edit View  
 Group Depreciation  
 Group Update  
 Print Page

Asset Type: --Select-- Asset ID: Attribute Name: --Select-- Attribute Value: Filter

	Asset Name	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
<input checked="" type="checkbox"/>	FH-00002		Water	Fire Hydrant	Point			In Service	01/31/2012
<input checked="" type="checkbox"/>	SM-00003		Sewer	Main	Linear	20	Feet	In Service	01/31/2012
<input type="checkbox"/>	SL-0002		Street	Light	Point			In Service	01/31/2012

- Complete the fields common to the selected asset types. Notice that when assets of the same type are selected, such as a group of street lights, additional attributes or attribute tables display that are specific to the asset type. For a description of the attributes and attribute tables, see [Asset Fields](#).
- Click **Save**.  
Civic Platform saves your information and refreshes the asset list so that it reflects the changes.



## Setting an Asset Display Image

Customize the asset detail view by setting a display image for an asset record. When you upload an image of the asset, you can select that image file to display in the asset record. Users can view the asset's image in the asset record detail tab as well as in the linked asset detail view. This allows users to visually identify assets and linked assets without leaving the asset detail view.

For information on uploading image files, see [Attaching Files](#). For information on linked assets, see [Managing Linked Assets](#).

### To set an asset display image

1. Navigate to the Assets portlet and locate the asset record you want to work with (see [Searching for an Asset](#)).

Civic Platform displays a list of all of the assets currently assigned to you.

2. Click the asset ID link for the asset record for which you want to set a display image.

Civic Platform displays the asset details.

3. Click the Documents tab.

Civic Platform displays the Asset Documents.

Asset ID: 200803291134888E

Menu Look Up New Info Download Display Image Delete Help

Go To Asset Detail Address (0) Work Order (5) Linked Assets Documents (4) PM Schedules (0) Usages (0)

Entity ID	File Name	Category	Size	Type	Modified Date	Modified By	Source	Department
<input type="checkbox"/> 2	42576.txt	9Specify LP	190.0 bytes	text/plain	02/06/2013	admin admin	ACCELA	Licenses
<input type="checkbox"/> 2	No Comment.pdf		32.99 KB	applicati...	02/06/2013	admin admin	ACCELA	Licenses
<input type="checkbox"/> 2	1.txt.bak	2All permission	871.0 bytes	text/plain	02/06/2013	admin admin	ACCELA	Licenses
<input type="checkbox"/> 2	background1.jpg		258.21 KB	image/pjpeg	02/06/2013	admin admin	ACCELA	Licenses

4. Select the image you want to use as the display image.

5. Click **Display Image**.

Civic Platform changes the value of the Display Image column of the image file to Y and displays the image in the Asset detail portlet.

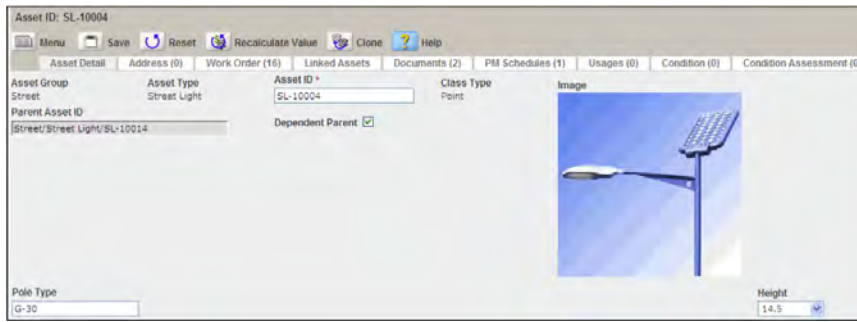
Asset ID: 200803291134888E

Menu Look Up New Info Download Display Image Delete Help

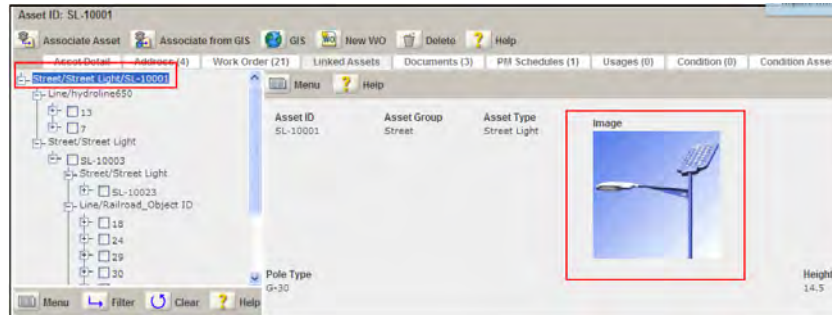
Go To Asset Detail Address (0) Work Order (5) Linked Assets Documents (4) PM Schedules (0) Usages (0) Condition (1)

The image file is successfully set as the source file for the current asset.

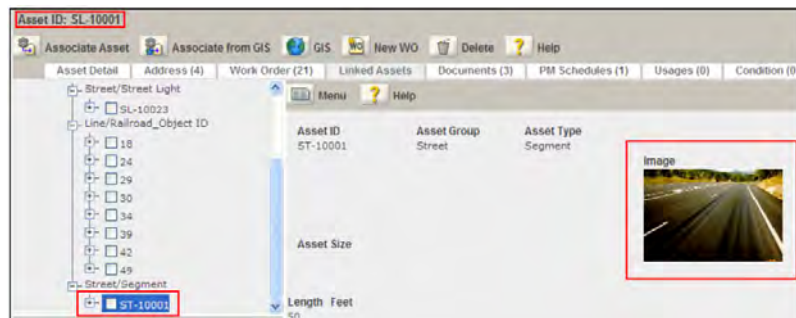
Entity ID	File Name	Category	Size	Type	Modified Date	Modified By	Source	Department	Display Image
<input type="checkbox"/> 2	background1.jpg	42576.txt	258.21 KB	image/pjpeg	02/06/2013	admin admin	ACCELA	Licenses	Y
<input type="checkbox"/> 2	No Comment.pdf		32.99 KB	applicati...	02/06/2013	admin admin	ACCELA	Licenses	N
<input type="checkbox"/> 2	1.txt.bak	2All permission	871.0 bytes	text/plain	02/06/2013	admin admin	ACCELA	Licenses	N
<input type="checkbox"/> 2		9Specify LP	190.0 bytes	text/plain	02/06/2013	admin admin	ACCELA	Licenses	N



The display image also appears in the linked assets detail portlet. The asset's own display image is visible by default in this portlet.



When a child or parent asset is selected from the linked asset navigation tree, the display image for the linked asset appears in the linked asset detail portlet.



## Printing an Asset

---

Asset details or an asset list can be printed using Civic Platform. For example, if someone submits an application for a new building, they might need a list of all the water lines and other underground utilities on the parcel. You can search for the assets on the parcel and then print the list. Or you might print the asset details for a truck that needs repair so that you can provide the history and specifications to the mechanic.

### To print an asset

1. Navigate to the Assets portlet and locate the asset record you work with. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. To print the list of assets, click the **Print** button above the list.
3. To print asset details, click the **Print** button above the record tabs.  
Civic Platform generates a PDF version of either the asset list or the asset details in a new browser window.
4. Use your browser's print command to print the asset.  
Depending on what browser you use to view PDF files, you may have the option to save the application PDF to your hard drive or send it as an email attachment.

## Cloning an Asset

You can create one or more new assets by cloning an existing asset. Cloning is the act of creating a duplicate application, asset, or service request using an existing application, asset, or service request as a template. Civic Platform automatically generates asset IDs for an asset created by cloning.

When you clone an asset, all the attributes except the Asset ID are copied to the new asset. For example, if you clone a water line, the line length, line width, flow, and pressure attributes are copied to each of the new assets.

### To clone an asset

1. Navigate to the Asset portlet.

Civic Platform displays the Asset list portlet.

Asset ID	Asset Name	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
FH-00002			Water	Fire Hydrant	Point			In Service	01/31/2012
SM-00003			Sewer	Main	Linear	20	Feet	In Service	01/31/2012
SL-0002			Street	Light	Point			In Service	01/31/2012

2. Click the **Asset ID** link for the asset you want to clone.

Civic Platform displays the Asset detail portlet.

3. Click **Clone**.

4. Complete the following fields:

**Asset ID Prefix**

Enter the prefix you want the group of assets to begin with. Leave this field blank if you want Civic Platform to use the Asset ID Mask setup by your administrator.

**No. of Clones**

Enter the number of clones to be created.

5. Click **Save**.

Civic Platform displays an Asset Clone Summary Report. To print the report, click **Print**.

Asset ID: FH-00002

Complete Print Help

Asset Detail Address (0) Work Order (0)

5 record(s) added successfully.

Asset Clone Summary Report

Asset ID: 5-1, 5-2, 5-3, 5-4, 5-5

Asset Type: Fire Hydrant

No. of Clones: 5

Updated Date: 02/05/2013

Updated By: ADA

6. Click **Complete**.

Civic Platform clones the asset and returns to the Asset detail portlet.

# Managing Associated Parts

Managing an asset often involves managing the parts commonly used to repair and maintain the asset. Maintenance personnel need to quickly access part information in order to complete work orders. You can associate part records to asset records so that users can view part information such as type, number, brand, description, and quantity in the asset record. When parts are associated to an asset, these standard parts are loaded into work orders generated for that asset. Users can click a button in the work order form to view the parts associated to the asset and then select parts from this list for issuance to complete the work order.

For information on working with part records, see [Part Inventory](#) .

## Topics

- [Associating a Part to an Asset](#)
- [Viewing Associated Part Details](#)
- [Deleting Associated Parts](#)

## Associating a Part to an Asset

Associate parts to asset records so that part information is readily accessible.

### Associating a part to an asset

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Associated Parts tab.  
Civic Platform displays a list of parts associated to the selected asset.

Asset ID: 200803291134888E

Menu Look Up Delete Help

Go To Associated Parts (1) contact update (1)

<input type="checkbox"/>	Part Number	Part Type	Part Brand	Part Description	Unit of Measure	Quantity	Comments	Status	Updated By	Updated Date
<input type="checkbox"/>	2323				Each	1.00		Active	ADMIN	02/06/2013

3. Click **Look Up**.

Civic Platform displays the Associated Parts search form.

Asset ID: 200803291134888E

Menu Submit Reset Cancel Help

Go To Associated Parts (1) contact update (1)

Part Number

Part Type

Part Brand

Part Description

Part Status

Unit Cost From  To

[check spelling](#)

Unit of Measure

Taxable

Total Supply From  To

Maximum Quantity From  To

Minimum Quantity From  To

Reorder Quantity From  To

4. Enter search criteria in the available fields. See [Part Inventory Fields](#) for field definitions.

## 5. Click **Submit**.

Civic Platform returns a list of parts that match your search criteria.

The screenshot shows the Civic Platform interface for an asset with ID 200803291134888E. The interface includes a header with the asset ID and buttons for Menu, Select, Look Up, Cancel, and Help. Below the header is a navigation bar with tabs for Asset Detail, Address (0), Work Order (5), Linked Assets, Documents (5), PM Schedules (0), Usages (0), and Condition (1). A table below the navigation bar lists associated parts. The table has columns for Part Number, Part Type, Part Brand, Part Description, Part Status, Track Cost by Location, Unit Cost, Unit of Measure, Taxable, and Total Supply. One part is listed with Part Number 296, Unit Cost 0.0000, and Total Supply 96.0000.

Part Number	Part Type	Part Brand	Part Description	Part Status	Track Cost by Location	Unit Cost	Unit of Measure	Taxable	Total Supply
<input type="checkbox"/> 296					No	0.0000	Each	No	96.0000

## 6. Select the part you want to associate to the asset.

## 7. Click **Select**.

Civic Platform selects the part.

## 8. Make changes to the **Quantity** or **Comments** fields, if desired. The default quantity is 1.

## 9. Click **Save**.

Civic Platform adds the part to the asset record and returns you to the list of associated parts.

## Viewing Associated Part Details

You can view detailed information about an associated part and edit the Quantity and Comments fields.

### To view associated part details

#### 1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column

Civic Platform displays the asset details.

#### 2. Click the Associated Parts tab.

Civic Platform displays a list of parts associated to the selected asset.

#### 3. Click the part name hyperlink.

Civic Platform displays the part details.

#### 4. Make changes to the **Quantity** or **Comments** fields, if desired. The default quantity is 1.

#### 5. If you have made changes, click **Save**.

Civic Platform saves your changes.

## Deleting Associated Parts

You may want to change the parts that are associated to an asset record. The manufacturer's recommendations for parts may have changed, or you may have discovered a more cost-effective part to use. Deleting a part record from an asset record does not delete the part from the database; rather, it deletes the relationship between the part and the asset.

### To delete associated parts

#### 1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.

Civic Platform displays the asset details.

#### 2. Click the Associated Parts tab.

Civic Platform displays a list of parts associated to the selected asset.

3. Select the part you want to delete from the asset record.
4. Click **Delete**.  
Civic Platform deletes the relationship between the part and the asset.

# Managing Linked Assets

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## Topics

- [About Linked Assets](#)
- [Linking an Asset](#)
- [Viewing or Editing Linked Assets](#)
- [Deleting an Asset Link](#)
- [Filtering Linked Assets in the Tree View](#)
- [Linking Assets to Work Orders Using Accela GIS](#)
- [Linking Assets Using Accela GIS](#)
- [Viewing Linked Assets Using Accela GIS](#)

## About Linked Assets

Assets may be associated with other assets. For example, a fire hydrant should be linked to the water lines that feed it. Telephone poles should be linked to the telephone wires that run across them. Manhole covers may be connected to the streets that they lie in as well as the pipes beneath them. A building might be linked to the furniture and equipment that are housed in it. Trucks and other heavy equipment might be linked to the shop or garage where they are stored when not in use.

Agencies establish practices regarding which types of assets link to one another. Once an asset is linked, the relationships between them can be viewed to better track and manage changes and more easily find assets that relate a project.

The relationship between assets indicate how an asset relates to another asset. A parent asset has dependent assets or children that would not exist without the parent. For example, a building is a parent asset to an HVAC unit.

When a parent to child relationship is made, the child to parent relationship is established at the same time. The combined relationship of assets to a parent is called an asset hierarchy, and is displayed in a tree view on the Linked Asset tab. Upon the first load of the page, the assets will display in a tree view to the left of the page. This will enable you to see the current asset record as the parent, and the children assets. You have the option of expanding any child asset to see the linked children. Since the number of relationships can be unlimited from parent to child asset, the software will query the child assets when the branch is expanded.

A parent asset may be a child to another asset. For example, a traffic signal is a parent to a luminaire and a child to a control box. The asset hierarchy tree view will allow the user to move up the tree to view the parent asset record to the displayed asset.

When the asset hierarchy tree view initially loads, it will only be one level deep, showing the relationship of the parent asset to one generation of child asset. The tree will display the first level of child assets organized by Asset Type. A plus sign is displayed next to the child assets to allow further expansion of the child relationships as needed. If you want to view the parent asset to the asset at the top of the tree view, either load the parent to the current parent asset, or right click on the asset and select Move Up.

## Linking an Asset

You can link one or more child assets to a parent asset. When a parent to child relationship is made, the child to parent relationship will also be made. For example, multiple street signs can be linked as a child asset to a segment of street.

**To link an asset to a parent asset**



1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Linked Assets tab.  
Civic Platform displays the Linked Assets tab.

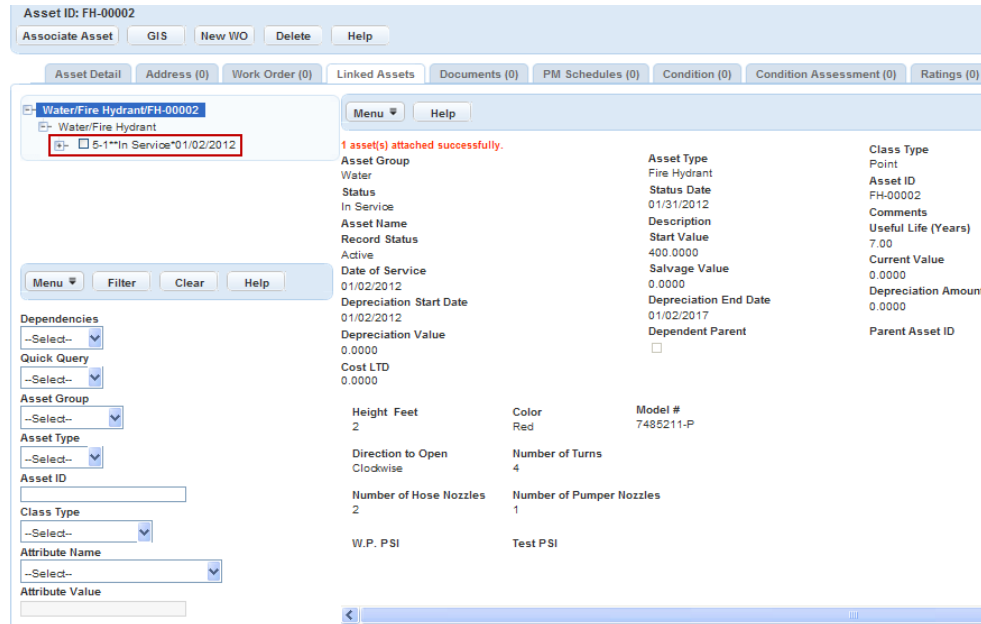
3. Click the parent asset, and then click **Associate Asset**.  
Civic Platform displays the form you use to link assets.
4. Search for the Asset IDs to link using these steps:
  - a. Select the Asset Group and then the Asset Type.  
Civic Platform displays the fields that apply to the asset.
  - b. Complete the fields with available data. See [Asset Fields](#) for field definitions.
  - c. Click **Submit**.  
Civic Platform returns a list of all assets that match your search parameters.
  - d. Select the assets you want to link.



**Note:**

An asset can only be linked to one parent asset. Assets already linked to a parent asset will not display in the search results.

- e. Click **Save**.  
Civic Platform adds the new asset to the tree view.

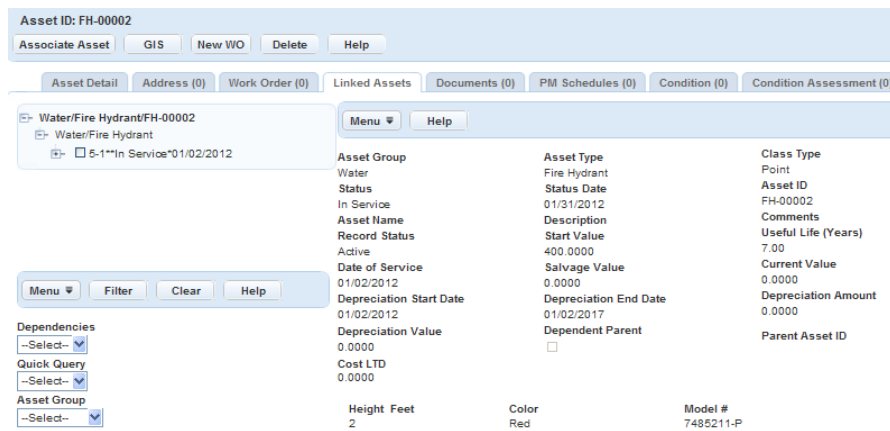


### Viewing or Editing Linked Assets

You can view the details of any of the child assets linked to an asset. For example, you are viewing the records for a control box, and want to see the records for the linked traffic lights.

#### To view or edit details about a linked asset

1. Navigate to the **Assets** portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the **Linked Assets** tab.  
Civic Platform displays the Linked Assets.



3. Click the **Asset ID** link for the asset you want to view or modify.  
Civic Platform displays the Linked Asset details.
4. Review, update, or print the details as necessary. If you update the information in any of the fields, click Submit to save your changes.

## Deleting an Asset Link

There may be reason to remove a link between two assets. A link may have been made by mistake or an asset may be moved or used differently, resulting in the link being obsolete. For example, an agency may sell off fleet vehicles after a few years. In such a case, any asset linked to a vehicle that is sold would need to have the link deleted. When a linked asset is deleted, it does not delete any assets; only the association between the assets is removed.

### To delete an asset link

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Linked Assets tab.  
Civic Platform displays the Linked Assets.
3. Select the linked assets that you want to dissociate in the Asset Hierarchy tree view.
4. Click **Delete**.

## Filtering Linked Assets in the Tree View

You have the option to filter the data displayed in the asset hierarchy tree view.

### To filter linked assets

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Linked Assets tab.  
Civic Platform displays the Linked Assets.
3. Select one or more of the Filter options, and click Apply.

## Linking Assets to Work Orders Using Accela GIS

There are multiple ways of linking an asset to a work order, one of which is via Civic Platform GIS.

If you have Accela GIS, you may select one or more GIS objects such as assets or addresses and link them to a work order through the map viewer. Existing assets can also be viewed from Accela GIS map viewer to help identify the assets that are already linked to the work order. This helps to define additional assets that might need to be linked to the work order.

### To link an asset to a work order using Accela GIS

1. Navigate to the Work Orders portlet and use Search to locate the work order to which you want to link.  
Civic Platform displays a list of all of the work orders currently assigned to you.
2. Click the record ID link in the record ID column.  
Civic Platform displays the work order summary.

Record ID: 13CAP-00002548

Menu ▾ Help

Go To ▾ Summary Record Info Activities (0) Activity Summary (1)

Application Detail: [Detail](#)

Application Type: [AMS/ACA/carol/Child Application](#)

Address: [921 carol street ALY, 123123123](#)

Owner Name: [DREAM HOUSE](#)

Owner Address: [SAN RAMON, CA](#)

Application Name:

File Date: [02/02/2013](#)

Application Status: [submit](#)

Initiated by Product: ACA

Parcel No:

3. Click the Asset tab.

Civic Platform displays a list of assets associated with the work order.

Record ID: 13CAP-00002548

Menu ▾ Save Look Up GIS ▾ Delete Help

Go To ▾ Summary Record Info Activities (0) Activity Summary (1) Address (1) Addtl Info App Specific Info App Specific Ir

<input type="checkbox"/> Asset ID	Asset Name	Order	Completion Date	Short Notes	Asset Group	Asset Type	Class Type	Asset Size
<input type="checkbox"/> <a href="#">1567641</a>					sail group 1	Elena-Nod...	Node-Link Linear	100

4. Click **GIS**.

Accela GIS displays the map viewer.

5. Using the Selection Tool, select the desired object.

6. Select the desired object ID from the GIS Data tab within the Select List tab.

7. From the drop-down list select **Link Objects to Work Order**

8. Click **Save**.

## Linking Assets Using Accela GIS

You can link assets via Accela GIS. If you have Accela GIS, and the GIS objects have been mapped to an asset type, you can select one or more GIS objects from a record set and link them to the selected parent asset. It also provides a visual of existing assets to help identify relationships for future assets. Once an asset is associated to a parent, it cannot be linked to another parent asset.

### To link assets using GIS

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.

Civic Platform displays the asset details.

2. Click the Linked Assets tab.

Civic Platform displays the Linked Assets.

3. Click **GIS**.

Accela GIS displays the map viewer.

4. Using the Selection Tool, select the desired object.

5. Select the desired object ID from the GIS Data tab within the Select List tab.
6. From the drop-down list select **Link Objects to Asset**
7. Click **Save**.

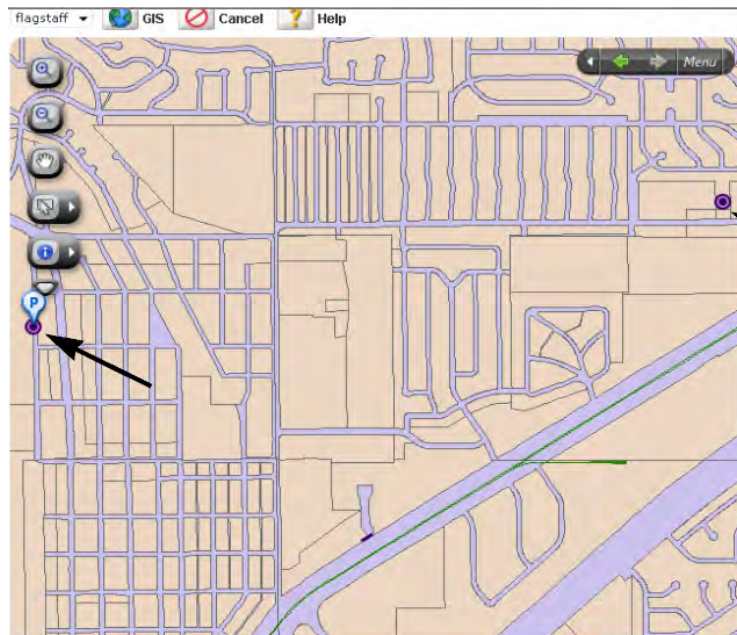
## Viewing Linked Assets Using Accela GIS

If you have Accela GIS, you may be able to select one or more GIS objects such as assets or addresses and view them in the map viewer. The map viewer provides a visual which can be very helpful when identifying the specific areas where assets are located and assist in identifying the relationships between assets, such as lines connecting to nodes.

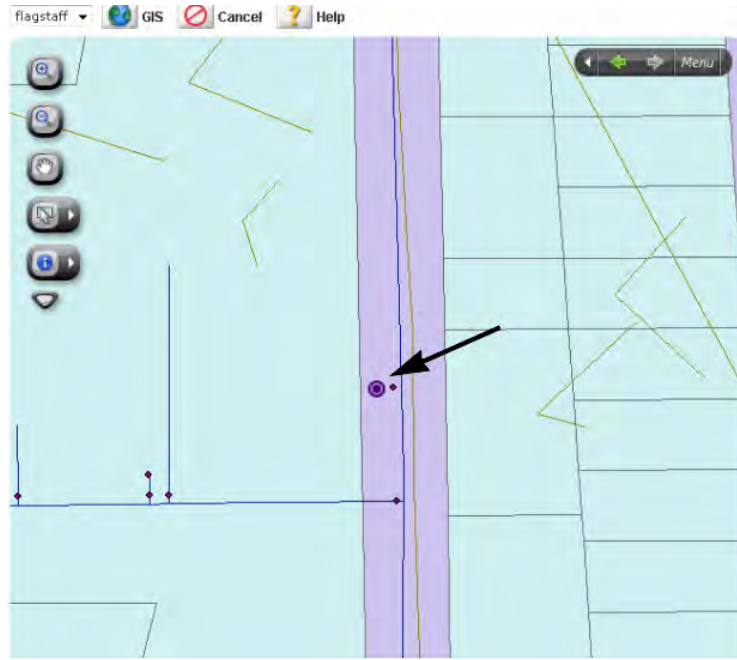
### To view an asset using GIS

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Linked Assets tab.  
Civic Platform displays the Linked Assets.
3. Select the linked asset(s) you want to view.
4. Click **GIS**.

If you select one or multiple linked assets, Accela GIS displays the parent asset and its selected children in the GIS Map Viewer with a map marker "P" identifying the parent asset.



If you do not select a linked asset, Accela GIS displays the parent asset in the GIS Map Viewer.



## Viewing the Asset Condition Assessment History

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You can look at which condition assessments have been completed for a given asset. Follow the steps below to review the condition assessment history.

### **To view an asset condition assessment history**

1. Navigate to the Assets portlet and use Search to locate the asset record you want to view. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Condition Assessment tab.  
Civic Platform displays the Linked Condition Assessment list.
3. Click the Condition Assessment ID link you want to review.  
The Condition Assessment ID Details tab displays the condition assessment and inspection history.

## Viewing PM Schedules for an Asset

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You can view the list of PM schedules that a given asset is linked to.

### To view PM schedules for an asset

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the PM Schedules tab.  
Civic Platform displays the PM Schedules list with all the PM schedules that the asset is linked to. Most fields in the list are standard PM schedule fields. See [Preventative Maintenance Schedule Fields](#). A few additional fields, as described below, give more information on the PM schedules with the asset.

<b>Last Date</b>	The Schedule Date of the last work order for this asset.
<b>Last Usage</b>	The usage reading of the asset when the PM schedule generates the last work order for the asset.
<b>Next Date</b>	This field equals to the Next Schedule Date configured in the PM schedule.
<b>Next Usage</b>	This field equals to the Last Usage value plus Usage Interval configured in the PM schedule.
<b>Previous Work Order Number</b>	The number of the work order that is generated most recently by the PM schedule for the asset.



## Managing Asset Usage

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The usage of a specific asset can be tracked within Civic Platform. For example, a fleet vehicle is used on a regular basis to perform maintenance on the cities water lines. The vehicle hours and mileage should be tracked to identify the use of the vehicle. Each usage reading that is entered will be collected and generate a history of how and when the asset was used.

The asset usage reading history can be viewed and managed from the asset usage reading list. The history of the usage will help identify if and when new assets may be needed based on over usage. It will also help identify when maintenance of the asset will need to be performed. In addition, the difference between the current usage reading and the previous reading is available on the asset usage reading list. You will be able to easily view and identify how much an asset was used since the last reading. The usage also affects the asset depreciation value and will be updated as appropriate.

### Topics

- [Adding an Asset Usage Reading](#)
- [Editing Asset Usage Reading](#)
- [Deleting an Asset Usage Reading](#)

### Adding an Asset Usage Reading

Adding usage readings on asset such as fleet vehicles assists in identifying when preventative maintenance tasks need to be performed on the vehicle as well as if additional assets need to be acquired. When an asset usage reading is added it is logged and the vehicle usage counts are updated. The usage also affects the asset depreciation value and will be updated as appropriate.

#### To add an asset usage reading

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Usage tab.  
Civic Platform displays the Asset Usage tab.
3. Click **New**.  
Civic Platform displays the fields that apply to the asset usage reading.
4. Enter the current Reading first, then select the Unit Type from the drop-down list, and then specify the Reading Date.  
For a description of the fields, see [Asset Usage Fields](#).
5. Click **Save**.  
Civic Platform updates the asset usage history list.

### Editing Asset Usage Reading

There may be need to edit an asset usage reading if there was mistake when it was originally created. Each time a reading is updated the usage is re-calculated to display the current usage counts on the asset. The usage also affects the asset depreciation value and will be updated as appropriate.

#### To edit an asset usage reading

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.

Civic Platform displays the asset details.

2. Click the Usage tab.

Civic Platform displays the usage history for the asset.

3. Enter the **Reading** details for the usage reading you want to modify.

For a description of the fields, see [Asset Usage Fields](#).

Civic Platform displays the Asset Usage reading details.

4. Review, update, or print the details as necessary. If you modify the information in any of the fields, click **Submit**.

## Deleting an Asset Usage Reading

There may be reason to remove an asset usage reading because of duplicate readings, a reading may have been made by mistake or on the wrong vehicle. When a reading is deleted, assets are not removed, only the usage history record of the asset is removed.

### To delete an asset usage reading

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.

Civic Platform displays the asset details.

2. Click the Usage tab.

Civic Platform displays the Asset Usage tab.

3. Select the asset usage readings that you want to dissociate.

4. Click **Delete**.

## Managing Asset Depreciation Values

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Assets lose value over the course of their use. This accounting principle is known as depreciation. Businesses usually record the amount of depreciation as expenses, thereby to gain tax relief. You can calculate the depreciation of an asset or multiple assets any time in Civic Platform.

Civic Platform keeps a historical log for all depreciation calculations performed on each asset. You can access to the log and view all the past depreciation calculations.

### Topics

- [Asset Depreciation Formulas](#)
- [Calculating Depreciation for an Asset](#)
- [Performing Asset Group Depreciation](#)
- [Viewing Depreciation History](#)

### Asset Depreciation Formulas

Civic Platform calculates asset depreciations based on the passage of time. The depreciation rate is the depreciable cost of an asset divided by the number of years of its useful life. For example, a vehicle is purchased at a cost of US\$24,000 and has a salvage value of US\$4,000. If the vehicle depreciates over 5 years, it depreciates at US\$4,000 per year:  $(\$24,000 - \$4,000) / 5 \text{ years} = \$4,000$ .



#### Note:

##### Depreciation Formulas:

Depreciation per Year =  $(\text{Start Value} - \text{Salvage Value}) / \text{Useful Life}$

Depreciation Period =  $(\text{Depreciation End Date} - \text{Depreciation Start Date}) / 365$

Years Elapsed =  $(\text{Current Date} - \text{Depreciation Start Date}) / 365$

Depreciation Amount =  $\text{Depreciation Period} \times \text{Depreciation per Year}$

Depreciation Value =  $\text{Start Value} - \text{Depreciation Amount}$

Current Value =  $\text{Start Value} - \text{Years Elapsed} \times \text{Depreciation per Year}$

Remaining Life =  $\text{Useful Life} - \text{Depreciation Period}$

There are two values after depreciation: depreciation value and current value. The depreciation value deducts the depreciation amount from the start value based on the depreciation end date you specify; the current value deducts the depreciation amount from the start value with the current date as the depreciation end date. If you specify the current date as the depreciation end date, the two values are identical.

The formulas require the following criteria on the asset fields. Civic Platform would skip the depreciation calculation on an asset if any of the criteria is not satisfied, and select "Depreciation Failed" for the asset.

- Start value: the start value must be greater than 0.
- Depreciation start date and depreciation end date: the depreciation start date cannot be null, and the depreciation end date must be later than the depreciation start date.
- Useful life: the useful life must be greater than 0.
- Salvage value: the salvage value must be no greater than the start value.

For a description of these fields, see [Asset Usage Fields](#).

## Calculating Depreciation for an Asset

After the creation of an asset, you may calculate its depreciation any time during its useful life.

### To calculate the depreciation for an asset

1. Navigate to the Assets portlet and click **Search**.
2. Complete any fields that display. For a description of the fields, see [Asset Fields](#).
3. Locate the asset record you want to calculate the depreciation. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
4. Complete the asset fields that act as the criteria in the asset depreciation formulas. See [Asset Depreciation Formulas](#).
5. Click **Recalculate Value** above the record tabs.  
Civic Platform calculates the asset depreciation and updates the following three fields of the asset: Depreciation Amount, Depreciation Value and Current Value.

## Performing Asset Group Depreciation

You may need to calculate the depreciations for a group of assets or all assets in your agency. Civic Platform gives you the option to perform group depreciations.

### To perform asset group depreciation

1. Navigate to the Assets portlet and use Search to locate the asset records you want to work with.
2. Select the assets you wish to perform group depreciation on. You may select assets of the same type, or of different types; you may skip this step if you plan to perform group depreciation for all the assets in the current list.
3. Choose **Menu > Group Depreciation**.  
Civic Platform displays the Depreciation Options page.
4. Set the depreciation options.
 

**Through Date**                      The depreciation end date. It is the current date by default.

**Depreciation For**                      Select whether to calculate depreciations for the selected assets or all the assets in the current assets list. The Selected Assets Only option does not display if you skipped step 2.
5. Click **Recalculate**.  
Civic Platform displays the Group Depreciation Report.

Asset Group	Asset Type	Start Value	Depreciation Amount	Depreciation Value	Salvage Value	Current Value	Recalculation
Water	Fire Hydrant	\$800	\$125,5578	\$674,4422	\$0	\$674,4422	2 Succeeded

The report shows the depreciation results by asset types.

- The values for each asset type (including **Start Value**, **Depreciation Amount**, **Depreciation Value**, **Salvage Value** and **Current Value**) are the sum values of the assets that belong to the asset type and succeeded in the group depreciation calculation.
  - **Depreciation Succeeded** of each asset type gives the number of assets that belong to the asset type and succeeded in the group depreciation calculation. The depreciation amount, depreciation value, and current value of these assets are all updated after the group depreciation.
  - **Depreciation Failed** of each asset type gives the number of assets that belong to the asset type but failed in the group depreciation calculation. For information on why an asset fails in depreciation calculation, see [Asset Depreciation Formulas](#).
6. Click **Menu > CSV Report** above the group depreciation report if you want to export the report to a CSV, comma-separated value, file.
  7. Click **Close** to exit the group depreciation report.

## Viewing Depreciation History

Civic Platform provides the ability to track the depreciation history for each asset. The history information may assist you in evaluating the asset depreciation status.

### To view an asset depreciation history

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Choose **Menu > Depreciation History**.  
Civic Platform displays the depreciation history for the current asset.
3. Do one of the following:
  - To export the log to a CSV (comma-separated value) file, click **Menu > CSV Report** above the depreciation history.
  - To remove a history record, select a record and click **Delete**.

## Managing Asset Cost Rates

Cost rates are very important for work orders management. For example, material and equipment cost rates are types of cost rates that must be identified and tracked for calculating the costs of work orders generated by an agency. If your agency administrator sets an asset type as resource in the administrator portlet, you can define the cost rates for the assets of the asset type. The cost rates are the default rates when you add assets into work orders.

If you want to define cost rates for some types of assets but the Cost Rates tab does not display in the Assets portlet, contact your agency administrator.

### Topics

- [Adding an Asset Cost Rate](#)
- [Editing an Asset Cost Rate](#)
- [Deleting an Asset Cost Rate](#)

### Adding an Asset Cost Rate

For each asset that your agency administrator enables the “Asset as Resource” option, you may define multiple cost rates, although only one cost rate can be effective at any given time.

#### To add an asset cost rate

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.

Civic Platform displays the asset details.

2. Click the Cost Rates tab.

Civic Platform displays the Cost Rates tab for the asset.

ID	Active Date	Expiration Date	Default Cost Factor	Fixed Rate	Unit Rate	Record Status	Updated Date	Updated By
<a href="#">5015</a>	02/06/2013	02/05/2014	20		10	Active	02/06/2013	ADMIN

3. Click **New**.

Civic Platform displays the Cost Rates details portlet for creating new cost rates for the assets.

Asset ID: FH-00002

Menu ▾ Submit Reset Cancel Help

Asset Detail Address Work Order Linked Assets Documents PM Schedules **Cost Rates** Condition

Active Date:  Expiration Date:

Fixed Rate:  Unit Rate:

Default Cost Factor: --Select--

4. Complete the fields that display. Note that the active period of a new cost rate shall not conflict with that of existing ones, because only one cost rate can be effective for an asset at any given time.

For a list of field descriptions, see [Asset Cost Rates Definitions](#).

5. Click **Submit**.

Civic Platform displays a list of all existing cost rates including the item just recorded.

## Editing an Asset Cost Rate

There may be need to edit a cost rate if there was mistake when it was originally created.

### To edit an asset cost rate

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Cost Rates tab.  
Civic Platform displays the Cost Rates tab for the asset.
3. Click the ID link of the cost rate you want to modify.  
Civic Platform displays the cost rate details.
4. Modify the details as necessary. For a list of field descriptions, see [Asset Cost Rates Definitions](#).
5. Click **Submit**.

## Deleting an Asset Cost Rate

There may be reason for you to delete an asset cost rate. When a cost rate is deleted, you cannot use it anymore in Civic Platform.

### To delete an asset cost rate

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Cost Rates tab.  
Civic Platform displays the Cost Rates tab.
3. Select the asset cost rates that you want to delete.
4. Click **Delete**.

## Working with Asset Conditions

Asset conditions, also known as Critical Notices, can be identified within Civic Platform. They specify requirements surrounding an application that an applicant must fulfill in order to qualify for approval. Although asset conditions do not necessarily impose holds, they may prolong the application process until they are met. For example, there may be manholes that have excessive toxic gas. When a work order is issued to inspect or repair the manhole or linked pipe line, a notice will be issued with the work order so that the worker will know how to handle the situation correctly. The critical notice or condition may look like “Excessive toxic gas in manhole. Manhole must be forced to air vent for one hour before entering.”

When an asset is linked to a work order, the work order checks the active conditions in the asset, and get the highest severity of the conditions. If the asset has any active condition, a Condition Notice View window displays. If the asset has an active lock condition, the work order fails to save.

### Topics

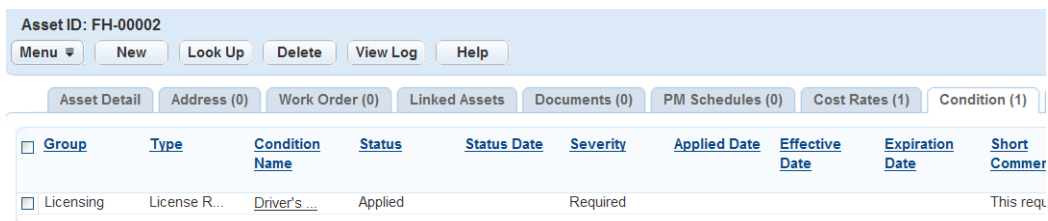
- [Adding a Condition](#)
- [Searching for and Editing a Condition](#)
- [Applying Asset Conditions on Work Orders](#)

### Adding a Condition

Conditions, also known as Critical Notices, are used to notify the worker performing a work order of any special instructions or information on a specific asset. These conditions are associated with an asset but will notify the worker when a work order is generated. Based on the severity and the status, a prompt message will appear when working with asset details or associating the asset with a work order. If an asset has a lock, hold, or notice condition, a notice pop-up will display. When the required condition is used, there will be no pop-up but the information will be viewable in the asset condition list page or the work order summary page.

#### To add a condition

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Condition tab.  
Civic Platform displays the list of Asset Conditions.



<input type="checkbox"/>	Group	Type	Condition Name	Status	Status Date	Severity	Applied Date	Effective Date	Expiration Date	Short Comment
<input type="checkbox"/>	Licensing	License R...	Driver's ...	Applied		Required				This requ

3. Click **New**.  
Civic Platform displays the fields that apply to the asset condition.
4. Enter the Condition Type, Name, Comments and any other additional fields that apply to the critical notice or condition.  
For a description of the fields, see [Asset Condition Fields](#).
5. Click **Save**.  
Civic Platform updates the asset condition list



## Searching for and Editing a Condition

Asset conditions, also known as critical notices, may be updated as necessary. In most cases, there may not be more than one or two conditions for a specific asset, but in the case that there are more, the conditions can be found by using the search. The condition can be selected and edited from the search results and changes saved will execute in the immediate pop-up screen that appears when working with the asset or creating a work order using the asset.

### To search or edit a condition

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Condition tab. If the condition you are looking for displays in the asset condition list portlet, select the condition name you want to edit and skip to step 8.  
Civic Platform displays the conditions for the asset.
3. Click **Search**.  
Civic Platform displays a search form.
4. Enter search criteria as needed to locate the asset condition you want. See [Asset Condition Fields](#) for field definitions.
5. Click **Submit**.  
Civic Platform displays the conditions that match the selection criteria.
6. Click the condition you want to view or edit.  
Civic Platform displays the details of the asset condition.
7. Update the fields that apply to the selected asset condition or critical notice. See [Asset Condition Fields](#) for field definitions.
8. Click **Save**.  
Civic Platform displays the updated asset condition list.

## Applying Asset Conditions on Work Orders

When you create or edit a work order against an asset, Civic Platform checks the schedule dates and effective dates of the conditions in the asset. If a condition meets one of the following criteria, Civic Platform considers the condition as active and applies it on the work order:

- The work order schedule date is after the current date, and falls between the effective date and expiration date of the condition;
- The work order schedule date is before the current date, and the current date falls between the effective date and expiration date of the condition.

When you save the work order, a Condition Notice View window pops up with all the active conditions of the assets that link to the work order. If the severity level of an active condition is Lock, you cannot create or save the work order successfully. An error message “Record cannot be created because there are lock conditions” displays.

When you generate work orders with PM Schedules, the generation process skips the assets with active Lock condition, and counts the assets in the Skipped Assets (not due to Generate Work Orders) column. For more information on generating work orders using PM schedules, see [Generating Work Orders Using PM Schedules](#).

## Working with Asset Ratings

Asset ratings are generally calculated using a rating formula created by your agency administrator. This formula can take into account asset details, asset attributes, condition assessment details, and condition assessment attributes.

### Topics

- [Creating an Asset Rating](#)
- [Viewing or Deleting Rating Values](#)

### Creating an Asset Rating

An inspector can inspect and rate an asset. After inspection, the inspector records the Rating Type, Rating Value, inspector's department, inspector name, Rating Date and Rating Time for the asset.

#### To create an asset rating

1. Navigate to the Assets portlet and use **Search** to locate the asset record you want to update.
2. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
3. Click the Ratings tab.
4. Click **New**.  
Civic Platform displays the rating details.

The screenshot shows the 'Ratings' tab for Asset ID: 475. The form contains the following fields:

- Rating Type:** A dropdown menu with '--Select--' selected.
- Rating Value:** A text input field.
- Department:** A dropdown menu with 'Current Department' selected.
- Inspector:** A dropdown menu with 'Current User' selected.
- Rating Date:** A date input field with '09/28/2012' entered.
- Rating Time:** A dropdown menu with '08:21 PM' selected.

5. Complete the fields with available data.  
For a list of field descriptions, see [Asset Rating Field Descriptions](#).
6. Click **Submit**.  
Civic Platform saves your information.

Table 67: Asset Rating Fields Descriptions

<b>Rating Type</b>	The rating type your administrator associates with the asset.
<b>Rating Value</b>	The value for the selected rating type.
<b>Department</b>	The department responsible for rating the selected asset.
<b>Inspector</b>	The inspector responsible for rating the selected asset.
<b>Rating Date</b>	The date that the asset rating is scheduled to occur.
<b>Rating Time</b>	The time that the asset rating is scheduled to occur.

## Viewing or Deleting Rating Values

You can generate a chart to represent the rating and rating values instead of a list view. This is useful if you need to track the pattern of change in the rating values over a period of time. Use the Chart button to create a chart for the rating values using the data in from the same rating type you selected. After viewing, you can close the chart by clicking the Close button.

### To view or delete rating values

1. Navigate to the Assets portlet and use **Search** to locate the asset record you want to update. Civic Platform displays a list of assets.
2. Click the asset ID link in the Asset ID column. Civic Platform displays the asset details.
3. Click the Ratings tab. Civic Platform displays the ratings portlet.
4. Click a rating type link. Civic Platform displays the rating values of the same rating type.

Asset ID: 00100040

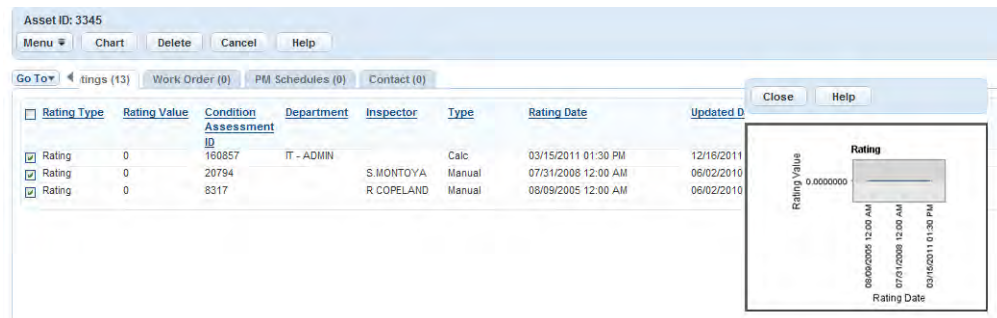
Menu Chart Delete Cancel Help

Go To Ratings Usages Work Order

<input type="checkbox"/>	Rating Type	Rating Value	Condition Assessment ID	Department	Inspector	Type	Rating Date
<input type="checkbox"/>	Test2	12		CD - ADMIN		Manual	10/18/2012 12:04 PM
<input type="checkbox"/>	Test2	11		CD - ADMIN		Manual	10/17/2012 12:04 PM

5. Select a rating value and do any of the following:

- To chart the rating value, click **Chart**. The rating values chart pops up.



- To delete the rating value, click **Delete**.

## Managing Asset Contacts

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You can manage contacts associated with an asset using the Contact tab. This allows you to easily track the individuals related to specific assets.

Contacts can be associated with one or multiple assets. Similarly, an asset can be associated with one or multiple contacts.

In order to use this feature, your agency administrator must complete the necessary configuration.

### Topics

- [Creating an Asset Contact](#)
- [Associating a Contact with an Asset](#)
- [Removing the Association between a Contact and an Asset](#)

### Creating an Asset Contact

You can create a contact and associate it with an asset.

#### To create an asset contact

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Contact tab.  
Civic Platform displays a list of contacts associated with the asset.
3. Click **New**.  
Civic Platform displays the Add Contact form.
4. Complete any fields that display.  
For a description of the fields, see [Contact Detail Fields](#).
5. Click **Submit**.  
Civic Platform creates the contact and associates it with the selected asset and displays the contact in the Contact list portlet.

### Associating a Contact with an Asset

You can look up a contact in the Civic Platform reference database and create an association between a contact and an asset.

#### To associate a contact with an asset

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Contact tab.  
Civic Platform displays a list of contacts associated with the asset.
3. Click **Look Up**.  
Civic Platform displays the Contact search page.

4. Complete any fields that display.  
For a description of the fields, see [Contact Detail Fields](#).
5. Select the contact you want to associate with the asset.
6. Click **Select**.  
Civic Platform associates the contact with the selected asset and displays a confirmation message.

## Removing the Association between a Contact and an Asset

You can remove the association between a contact and an asset.

### To remove the association between a contact and an asset

1. Navigate to the Assets portlet and use Search to locate the asset record you want to update. Click the asset ID link in the Asset ID column.  
Civic Platform displays the asset details.
2. Click the Contact tab.  
Civic Platform displays a list of contacts associated with the asset.
3. Select the contact you want to remove from the asset.
4. Click **Delete**.  
Civic Platform removes the association between the contact and the asset and displays a deletion confirmation message.

## Working on the Asset Calendar

The Calendar tab of the Assets portlet provides the asset calendar. The asset calendar provides a quick view to the following types of events that users performed on an asset.

- Records
- Condition Assessments
- PM Schedules
- Ratings
- Resource Scheduling

Asset event entries display in the calendar by their event times, such as the schedule time, or the time when users conducted the event. For more information, see [Asset Events on Display in the Asset Calendar](#).

You can view the calendar in daily, weekly and monthly mode. The image below shows a sample monthly view of the asset calendar. The calendar legend shows that each asset event type has a designated color for easy identification. You can enable the display of one or more (or all) asset event types in the calendar.

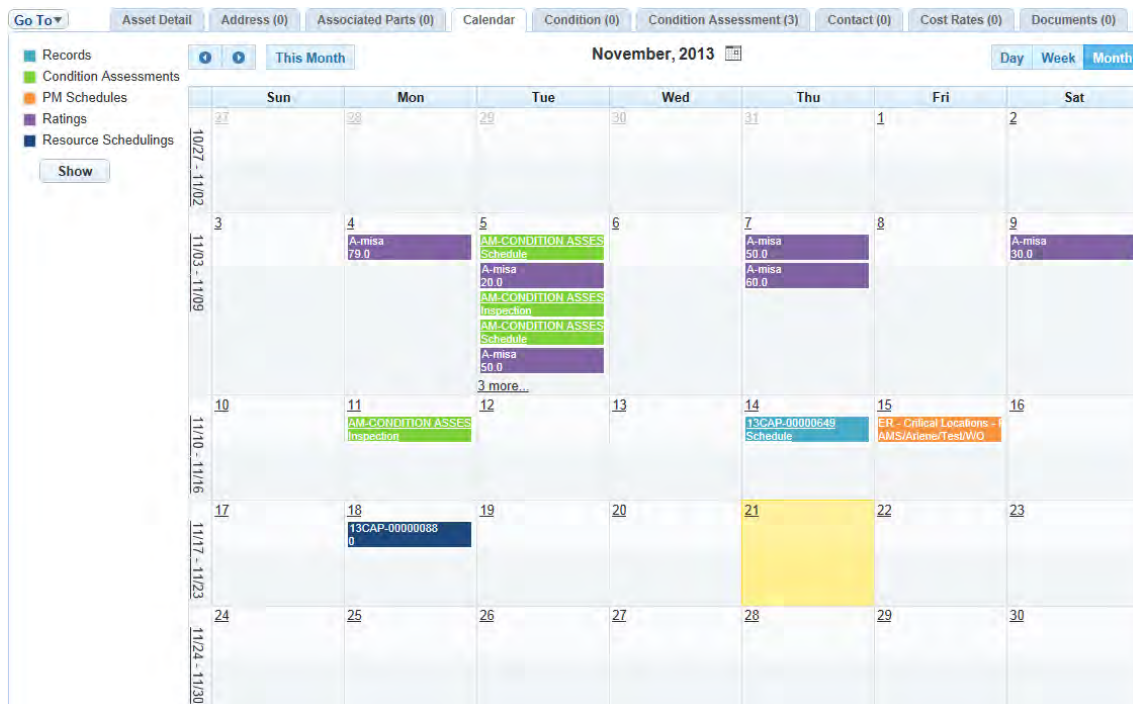


Figure 22: Sample Asset Calendar

### To work on an asset calendar

1. Navigate to the Assets portlet and use Search to locate and select the asset you want to work with. Civic Platform displays the asset details on the secondary tabs.
2. Click the Calendar tab. Civic Platform displays the asset calendar in daily mode. The records that you associated with the asset display in the calendar by default.

3. To change the view of the calendar, do one of the following:

- Click the **Day**, **Week**, or **Month** button on the upper right of the calendar, depending on in what mode you want to view.
- Click the left or right arrow on the upper left of the calendar to move one day, or one week, or one month back or forward.
- Click the **Today**, **This Week**, or **This Month** button on the upper left of the calendar to change the view to today, this week, or this month.
- Click the calendar icon to quickly locate a date.
- In the weekly mode, click a date link to view the calendar of the date.
- In the monthly mode, click a week link to view the calendar of the week, or click a date link to view the calendar of the date.

4. To configure what asset event types display in the calendar, do the following:

- If the square box next to a type has no color in it, the type is currently not on display in the calendar. Click the type or click the square box to select the type.  
Civic Platform displays colored square boxes next to the asset event types that you select.
- If the square box next to a type displays in a color, the type is already on display in the calendar. Click the square box to remove the type.  
Civic Platform removes color from the square box of the asset event type that you remove.
- Click **Show** to enable the display of the selected asset event types in the calendar.  
Civic Platform refreshes the calendar, with the events of the selected types added as entries in the calendar.

5. Hover the mouse over an asset event in the calendar to view the identification information and time information about the event. For more information, see [Asset Events on Display in the Asset Calendar](#).

- With record entries and condition assessment entries in the calendar, you can click the link at the entry to open the record details or condition assessment details, and perform further actions on the record or the condition assessment.

Table 68: Asset Events on Display in the Asset Calendar

Type	Events Shown in Calendar	Event Time	Remark
<b>Record</b>	Schedule arrangement of the record/work order	Schedule Date Completed Date Closed Date Meeting Date	If there is an event date but the time is null or 12:00 AM, the event displays as an all day event. If both the event date and event time are not null, unless there is a time duration (for example, in the schedule of a record meeting, the time duration displays as half-an hour in the calendar.
<b>Condition Assessment</b>	Schedule and inspection arrangement of the condition assessments	Schedule Date Inspection Date	
<b>PM Schedule</b>	Schedule arrangement in the PM Schedule, preconditioned that the Trigger By option of the PM schedule is Scheduled Date	Next Schedule Date	
<b>Rating</b>	Entry of rating scores for the asset	Rating Date	

Type	Events Shown in Calendar	Event Time	Remark
<b>Resource Scheduling</b>	Assignment of the asset to work orders or condition assessments as a resource, preconditioned that the asset is flagged as a resource	Assignment Date	

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## Examining Asset Details


There may be many detail forms and fields you will work with assets. The following tables list and define the default fields available in the different interfaces you will encounter.

- [Asset Fields](#)
- [Part Inventory Fields](#)
- [Tree View Filtering Fields](#)
- [Asset Usage Fields](#)
- [Asset Condition Fields](#)
- [Asset Cost Rates Definitions](#)

### Asset Fields

The table below lists and defines the default fields available on the Assets portlet.

Table 69: Asset Fields

<b>Asset Group</b>	The asset group. Example: component, line or node.
<b>Asset ID</b>	The number used to identify the asset.
<b>Asset Size</b>	A positive numeric value for the size of the asset. This field may be required for asset types that belong to the Linear, Node-Link Linear, or Polygon class types, depending on your agency's settings. Enter the unit of measure in the Size Unit field.
<b>Asset Type</b>	<p>The type of asset.</p> <p> <b>Note:</b></p> <p>After you select an asset type, some asset attributes or attribute tables may display below the standard asset fields. The attributes and attribute tables are defined by your agency administrator in the asset template that associates with the asset type. You can enter more information about the asset in the attributes or attribute tables.</p>
<b>Comments</b>	Enter any comments associated with the asset.
<b>Current Value</b>	This read-only field shows the current value of the asset. The value is the result of the asset depreciation calculation that takes the current date as the depreciation end date. For the formula on how to calculate the current value, refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Date of Service</b>	The date the asset was initially placed into service.
<b>Dependent Parent</b>	Indicates whether the parent asset is dependent on this asset. This action will update the parent asset status whenever this asset status changes.
<b>Description</b>	The description of the asset.
<b>Depreciation Amount</b>	This read-only field shows the decline in the asset value by the asset depreciation calculation. For the formula on how to calculate the depreciation amount, refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Depreciation End Date</b>	The end date for the asset depreciation calculation. This field is used in the asset depreciation calculation. Refer to <a href="#">Asset Depreciation Formulas</a> .

<b>Depreciation Value</b>	This read-only field shows the asset value after the asset depreciation calculation. For the formula on how to calculate the depreciation value, refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Depreciation Start Date</b>	The start date for the asset depreciation calculation. This field is used in the asset depreciation calculation. Refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Parent Asset</b>	The asset is linked to a parent asset, the parent asset ID appears in this field. For more information on asset relationships, see <a href="#">Managing Linked Assets</a> .
<b>Salvage Value</b>	The residual value of the asset at the end of its useful life. This field is used in the asset depreciation calculation. Refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Size Unit</b>	The unit of measure from this drop-down menu that corresponds to the value entered in the Asset Size field. Your system administrator determines which units are available in this menu.
<b>Start Value</b>	The beginning value or purchase price of the asset. This field is used in the asset depreciation calculation. Refer to <a href="#">Asset Depreciation Formulas</a> .
<b>Status</b>	The status of the asset. The status will default to active when a new asset is created. Changing the status of the asset will effect the maintenance, availability, and depreciation calculation of the asset.
<b>Status Date</b>	The date the asset status changed.
<b>Sub Total for Condition Assessments</b>	This read-only field displays the sub-total costs from all the condition assessments on the asset.
<b>Sub Total for Work Orders</b>	This read-only field displays the sub-total costs that you distributed to the asset from work orders.
<b>Total Cost LTD</b>	This read-only field displays the total amount of the <b>Sub Total for Condition Assessments</b> , and <b>Sub Total for Work Orders</b> .
<b>Useful Life</b>	The number of years the asset is expected to be used. This field is used in the asset depreciation calculation. Refer to <a href="#">Asset Depreciation Formulas</a> .

## Part Inventory Fields

The following table lists and defines the fields that may be available on the Parts Inventory portlet.

Table 70: Part Inventory Fields

<b>Calculate Type</b>	<p>The calculation type. This type is used to calculate the average cost of the part</p> <p>Choices include</p> <p>Simple Average: The average cost is equal to the sum of the unit cost of a current shipment and existing average cost, divided by two. This provides the average value of the existing average cost and the cost per unit of the current shipment.</p> <p>Weighted Average: This is the same as the Simple Average, but weighted by quantity. This means that the existing part quantity is multiplied by the existing average cost and then the quantity of the current shipment is multiplied by the unit cost of the shipment. Then the sum of these values is divided by the total part quantity.</p>
<b>Comments</b>	Comments associated with the part.
<b>Maximum Quantity</b>	The maximum quantity of the part.
<b>Minimum Quantity</b>	The minimum quantity on hand for the part for all locations.
<b>Part Brand</b>	The brand of the part. For example, Valvoline is a brand of motor oil.
<b>Part Description</b>	The description of the part.

<b>Part Number</b>	The number of the part that will be used to identify the part in the parts inventory list. This number may be the manufacturer part number or the number that your agency uses for the part.
<b>Part Status</b>	The status of the part.
<b>Part Type</b>	The type of part. Example: Fittings, Fleet, Materials.
<b>Reorder Due</b>	The status of reorder will display “Yes” if the total supply is greater than the minimum quantity. The reorder due will display “No” if the total supply is less than the minimum quantity.
<b>Reorder Quantity</b>	The quantity needed when the part is reordered.
<b>Taxable</b>	The status of whether or not the part is taxable.
<b>Total Supply</b>	The total quantity on hand for the part displays in this field. It is a read-only field and will updated based on part inventory.
<b>Unit of Measure</b>	The unit of measure for the part. Example: Hours, Miles.

## Tree View Filtering Fields

The following table lists and defines the fields available for filtering on the Tree View.

Table 71: Tree View Filtering Fields

<b>Dependency</b>	Select to display only the child assets that the parent asset is dependent on for operation. To mark an asset as dependent to the parent, see <a href="#">Viewing or Editing Linked Assets</a> .
<b>Quick Query</b>	Choose a field to determine which child assets to display. Only the child assets that match the selected field will display. For a list of options, see
<b>Class Type</b>	The Class Type is how Civic Platform groups objects that an agency owns or maintains.  The five class types are component, linear, node-link linear, point, and polygon. Asset class types provide the ability to assign or group multiple asset types together. Choose a field to determine the asset type you want to display. Only child assets that match that type will display.
<b>Asset Group</b>	The Asset Group is an agency-defined collection of objects the agency owns or maintains.  Choose a field to determine the asset group you want to display. Only child assets that match that group will display.
<b>Asset ID</b>	The Asset ID is the unique identification for an asset.  Type an asset ID into the test field to search for child assets. This field supports the use of the “ % ” wildcard. If a value is entered in this field, then only assets matching the value will display.
<b>Attribute</b>	This displays all available asset attributes.  Choose an asset type to filter the asset list to those available within that asset type. If a value is selected but there is no entry in the Attribute Value field and no asset type selected, then only assets with this attribute are displayed in the tree view. If an attribute is selected and an asset type is selected, but no attribute value, then the result will be the same as only having the asset type selected, as all assets of that type should have the attribute.
<b>Attribute Value</b>	This field is read only until an attribute is selected. The field then refreshes based on the attribute.

## Asset Usage Fields

The following table lists and defines the fields available on the Asset Usage portlet.

Table 72: Asset Usage Fields

<b>Comments</b>	Any comments related to the asset usage or reading.
<b>Reading</b>	The current usage reading number.
<b>Reading by Department</b>	The department responsible for completing the reading for the asset. Click the Selection icon to choose a department.
<b>Reading by Staff</b>	The individual within a department that enters the asset usage reading. Use the drop-down list to choose an individual within the selected department. If you are responsible, click the <b>Current User</b> link to enter your user name into the field. When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.
<b>Reading Date</b>	The date of the usage reading.
<b>Reading Unit</b>	The unit of measure related to the current usage reading. Use the drop-down list to select a reading unit.
<b>Unit Type</b>	The unit type applicable to the specific Asset ID. As a reference, the corresponding Last Reading and Last Reading Date fields will populate with the last usage reading and reading date as read-only fields. The Unit Type field only displays if your agency administrators enabled this specific functionality.
<b>Work Order</b>	The work order associated with the asset usage reading.

## Asset Condition Fields

The following table lists and defines the fields available when working with asset conditions.

Table 73: Asset Condition Fields

<b>Action by Dept</b>	The department that identified the critical notice.
<b>Action by User</b>	The user that identified the critical notice.
<b>Applied by Department</b>	The department of the user creating the condition.
<b>Applied by User</b>	The user creating the condition. The current user link can be selected to automatically populate the field with the current user.
<b>Applied Date</b>	The date the condition or critical notice should be applied.
<b>Comment</b>	Comments associated with the notice or condition. You can also click the Standard Comment button or link to display the general standard comment selection window.
<b>Condition Name</b>	The name used to identify the condition or notice. This field will display as read only when in edit mode.
<b>Effective Date</b>	The date the condition or critical notice takes effect.
<b>Expiration Date</b>	The date the condition or critical notice is to be expired. The prompt message will display until the expiration date or if the expiration date is blank the prompt message will display until removed or date is entered. The date must be after the current and effective date.

<b>Severity</b>	The severity of the condition or notice. The Lock, Hold, and Notice severities will execute a prompt message to appear when working with the asset or creating a work order using the asset. The severity Required does not prompt a message. If the status field is not set to “Applied” the prompt message will not display for any of the severities.
<b>Status</b>	The status of the condition. If the status is changed set to “Applied”, the field severity will be set to Lock, Hold, Noticed, Required and a prompt message will be executed for the asset. If the status is not “Applied”, the severity field will be blank and a prompt message will no be executed.
<b>Type</b>	The type of condition or critical notice.

## Asset Cost Rates Definitions

The following table lists and defines available asset cost rates.

Table 74: Asset Cost Rates Definition

<b>Active Date</b>	The date when the cost rate becomes effective.
<b>Default Cost Factor</b>	The cost factor. Example: 1.0 Regular Pay, 1.5 Overtime Pay, 2.0 Holiday Pay. This field is associated primarily with labor cost types. The Standard Choice COST_FACTOR defines the options for this field.
<b>Expiration Date</b>	The date when the cost rate expires.
<b>Fixed Rate</b>	The fixed cost amount to be used for the cost item. It will be identified as hours, dollars, etc. using the units of measure.
<b>ID</b>	Auto-generated cost rate ID.
<b>Record Status</b>	Read-only field in the cost rates list. It is “Active” for all cost rates, however, only one cost rate can be effective at a given time.
<b>Unit Rate</b>	The unit cost amount to be used for the cost item. It will be identified as hours, dollars, and so forth, using the units of measure.
<b>Updated Date</b>	Read-only field in the cost rates list. It shows the date when the cost rate is last updated.
<b>Updated By</b>	Read-only field in the cost rates list. It shows the user who last updated the cost rate.

## Work Order Cost Distribution

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Choose a topic from the list below to learn more about work order cost distribution.

### **Related Information**

[Work Order Cost Distribution Overview](#)

[Navigating to the Distribute Costs Portlet](#)

[Distributing Costs](#)

[Managing Work Order Cost Distribution History](#)

## Work Order Cost Distribution Overview

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Work Order Cost Distribution enables you to distribute the costs of a work order to its associated assets and track how much cost is spent on the assets. Work order costs can include the materials, equipment, and labor required to maintain an asset.

If a work order has only one associated asset, then the cost distribution process is basic, and the selected costs are associated to the asset record. For example, you have a work order for a hydrant flush. Because only one hydrant is associated to the work order, all the work order costs related to the hydrant flush are associated with the hydrant asset.

If a work order has multiple assets, you have many distribution options.

- **Asset Count:** If each associated asset on a work order is of the same asset type, then you can use Asset Count to distribute the costs. This method (Costs/Number of assets) is the simplest distribution method, and can be used with all asset types and classes. For example, you have a work order to stripe multiple street segments. You can use Asset Count to distribute the work order costs evenly to each street segment.
- **Asset Size:** When you distribute costs by Asset Size, (Sum of the costs/Weighted size of each asset selected), you give each asset a proportional share of the costs. For example, you have a work order to repair the connection point of two sewer lines, one smaller and one larger. You can use Asset Size to account for the size difference in each sewer line when you distribute work order costs.
- **Asset Type:** If the associated assets on a work order are of varying types, you can distribute costs by Asset Type. This allows you to break out costs based on the type of asset rather than the quantity or size.
- **Manual Allocation:** You may have the option to manually define the amount to be allocated to each associated asset on a work order.

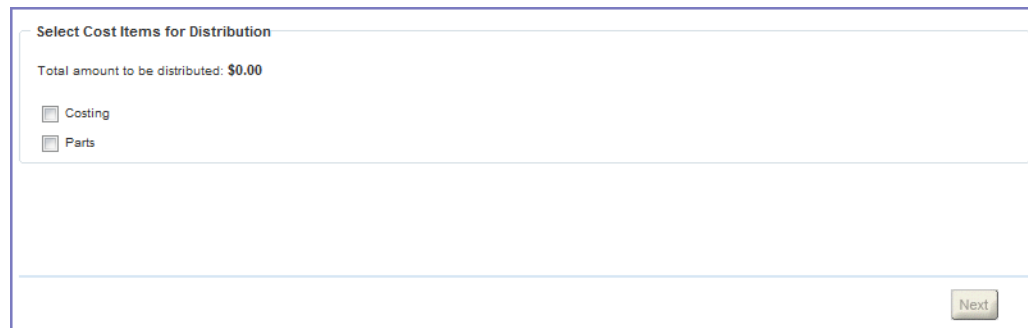
You can view distributed cost data on the Summary and Distribution History tabs on a Work Order record, or on the Work Order or Asset Detail tabs of an Asset record. The Distribution History tab provides the option of rolling back distributed costs.

## Navigating to the Distribute Costs Portlet

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You can distribute costs from multiple access points within the Work Order portlet, including the Summary, Assignments and Costs, Part, and Record portlets. The steps below describe how to navigate to the Distribute Cost portlet from each of these four portlets.

1. Navigate to the Work Order portlet and use search to locate the work order for which you want to distribute costs.
2. Click the work order link in the Record ID column for the record you want to work with. Civic Platform displays the work order details on the Summary tab.
3. Complete one of the following:
  - From the Summary or Record portlet.
    1. Stay on the Summary page or click the Record tab.
    2. Hover on **Menu** to reveal a command menu, then select **Distribute Costs**.
  - From the Assignments and Costs or the Part tab.
    1. Click the Assignments and Costs or Part tab.
    2. Click **Distribute Costs**.  
Civic Platform displays the first page of the Distribute Costs portlet.



Select Cost Items for Distribution

Total amount to be distributed: \$0.00

Costing

Parts

Next

4. Distribute costs as needed. See [Distributing Costs](#) for more information.



## Distributing Costs

If there are multiple assets associated with a work order, you have multiple options for cost distribution.

### To distribute costs

1. Navigate to the Distribute Costs portlet. See [Navigating to the Distribute Costs Portlet](#) for more information.  
Civic Platform displays the Distribute Costs portlet.
2. Select **Costing** and/or **Parts**, depending on how you want to select items for costing.  
Civic Platform displays a list of available costs and/or parts.
3. Select one or more items for distribution. To select all the items in the list, mark the check box in the header row as shown below.

Select Cost Items for Distribution

Total amount to be distributed: \$0.00

Costing

Parts

<input type="checkbox"/> Transaction Number	Location Name	Part Number	Part Type	Quantity	Work Order Task	Transaction Date	Tr
<input type="checkbox"/>	Loo-Offic..	gaby	Equipment	1		01/23/2012	\$
<input type="checkbox"/> 685	Loo-Offic..	DEMO-PART1	Equipment	1		01/23/2012	\$
<input type="checkbox"/> 684	Location 1	hendry-test	Equipment	1		01/23/2012	\$
<input type="checkbox"/> 683	Location 1	aam-demo...	Equipment	1		01/23/2012	\$
<input type="checkbox"/> 682	Loo-Offic..	918	Equipment	1		01/23/2012	\$

Next

As you select items, the Total Amount to be Distributed at the top of the page is updated to reflect your selections.

4. Click **Next**.  
Civic Platform displays the 'Select Assets to Distribute to' page.
5. Select the assets to which you want to distribute costs, then click **Next**.  
Civic Platform prompts you to choose a method of distribution.

Choose a Method of Distribution

By Number of Assets

By Asset Size

By Asset Type

By Manual Allocation

6. Choose the distribution method you want to use:

- To distribute costs by Asset Count
  1. Choose **By Number of Assets** and click **Next**.
- To distribute costs by Asset Size
  1. Choose **By Asset Size** and click **Next**.



**Note:**

If the assets in a work order are all of the linear class type, when you distribute costs among them by Asset Size, the costs are in fact distributed by the Work Lengths of the assets. Work Length is the distance between the start location and end location of the linear assets in the work order.

- To distribute costs by Asset Type
  1. Select **By Asset Type** on the Distribution Method page.  
Civic Platform displays a list of Asset Types.

Choose a Method of Distribution

By Number of Assets  
 By Asset Size  
 By Asset Type

Asset Group	Asset Type	Class Type	Count	Percentage
Component	AAM_DEMO_TA		1	<input type="text"/> %
Component	AAM_DEMO_TA1	Point	4	<input type="text"/> %

Total Percentage: 0.00%

2. Complete these fields:

**Distribute by size**

Enable to distribute costs to an asset based on the asset size. This option displays when distributing work order costs to a polygon, linear, or node-link linear asset class.

**Percentage**

The percentage of the total cost you want to distribute to each asset type. The sum of all the **Percentage** field values must equal 100%.

3. Click **Next**.

- **To distribute costs by manual allocation**

1. Select **By Manual Allocation**.

Civic Platform displays the Manual Allocation Cost Distribution section.

2. Enter the amount you want to distribute to each associated asset in the **Cost** field (you may need to scroll to the right to find the **Cost** fields). The total cost you allocate to all assets must equal the cost allocation for distribution
3. Click **Next**.  
Civic Platform displays the Distribution Summary page. This page summarizes the cost distribution based on your selections.

**Distribution Summary**

Total Cost allocated for distribution: \$13,702.00 [Edit](#)

Number of Assets selected: 5 of 5 [Edit](#)

Distribution method: By Number of Assets [Edit](#)

---

**Cost allocated by Assets**

Assets							
ID	Asset Type	Class Type	Asset Size	Work Length	Size Unit	Completion Date	Cost
	loo	Point					\$2,740.40
	loo	Point					\$2,740.40
	loo	Point					\$2,740.40
	loo	Point					\$2,740.40
	AAM_DEMO_TA						\$2,740.40

Total Cost: \$13,702.00

[Back](#) [Distribute](#)

7. If necessary, you can modify the distribution details by clicking the Edit link next to the item you want to modify. If you are happy with your distribution settings, proceed to the next step.
8. Click **Distribute**.  
Civic Platform distributes the work order costs to the selected assets.

## Managing Work Order Cost Distribution History

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You can use the Distribution History tab to confirm the work order costs assigned to individual assets, and to roll back work order costs as needed.

### Topics

- [Reviewing Work Order Cost Distribution History](#)
- [Rolling Back Work Order Cost Distribution](#)

### Reviewing Work Order Cost Distribution History

Review a list of distributed work order costs in the Distribution History portlet if you want to confirm the work order cost assigned to individual assets.

#### To review work order cost distribution history

1. Navigate to the Work Order portlet and use Search to locate the work order for which you want to review costs.
2. Click the work order link in the Record ID column.  
Civic Platform displays the work order details on the Summary tab.
3. Click the Distribution History tab.  
Civic Platform displays the cost transactions completed for the selected work order.

### Rolling Back Work Order Cost Distribution

When you roll back costs, you remove all the costs assigned to assets in a transaction. For example, you have a work order cost transaction that distributes costs to three assets. You want to roll back the costs for one of the assets. In order to do this, you must roll back the costs for all three assets included in the work order transaction.

#### To roll back work order cost distribution

1. Navigate to the Work Order portlet and use Search to locate the work order for which you want to review costs.
2. Click the work order link in the Record ID column.  
Civic Platform displays the work order details on the Summary tab.
3. Click the Distribution History tab.  
Civic Platform displays the cost transactions completed for the selected work order.
4. Select the transaction numbers you want to work with.  
Civic Platform automatically selects all transactions with the same transaction number.
5. Click **Undo**.  
You are prompted to confirm whether you want to roll back all the costs.
6. Click **OK** to proceed.  
Civic Platform rolls back all the costs for the selected transaction.

## Asset Condition Assessments

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Choose a topic from the list below to learn more about working with asset condition assessments.

### **Related Information**

[Asset Condition Assessments Overview](#)

[Creating an Asset Condition Assessment](#)

[Viewing and Editing an Asset Condition Assessment](#)

[Rescheduling an Asset Condition Assessment](#)

[Working with Asset Condition Assessment Observations](#)

[Managing Asset Condition Assessment Attachments](#)

[Working with Asset Condition Assessment Ratings](#)

[Working with Asset Condition Assessment Work Orders](#)

[Managing Condition Assessment Assignments and Costs](#)

[Examining Asset Condition Assessment Details](#)

## Asset Condition Assessments Overview

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An asset condition assessment is a scheduled maintenance review and/or a quality review of a group of assets. Agencies may require such assessments for many different asset types such as vehicles, buildings, and water lines. Agencies may set different intervals for different asset types as well. For example, agency vehicles might require safety and emissions inspections yearly, while water lines might require an assessment every three months.

You can configure Civic Platform to assign an inspector when a user schedules an assessment date and time. If the inspector cannot perform the assessment on the scheduled date, you can reschedule as needed.

During an assessment, an inspector may make observations about the condition of the asset. For example, he may go to a certain area to look at the condition of the sidewalk and determine if there any cracks or whether the sidewalk is level. The inspector also looks at the area around the section sidewalk to determine whether trees or brushes block the walking path.

After the inspector completes the assessment, the inspector can log his findings into Civic Platform as an asset condition assessment observation, which he can modify later as more information becomes available. He can attach documents and photos as needed to the asset condition assessment record, and record the assignments and costs that occur on the assessment.

## Creating an Asset Condition Assessment

You can create one or more asset condition assessment records as needed to meet the requirements of your agency.

### To create an asset condition assessment

1. Navigate to the Asset Condition Assessment portlet.  
The Asset Condition Assessments list portlet displays.

Condition Assessment ID	Asset ID	Asset Group	Asset Type	Class Type	Asset Description	Asset Comments	Asset Status
353	36	Line	Hydrant_o...	Linear	37	WS	
343	DEMO_GRP_...	Water	Hydrant	Point	This asse...		ACTIVE
333	DEMO_GRP_...	Water	Hydrant	Point	This asse...		ACTIVE
329	DEMOJUNE22	Component	AAM_DEMO_TA				ACTIVE
328	COMPONENT...	Component	AAM_DEMO_TA		New Asset		ACTIVE
327	DEMOJUNE22	Component	AAM_DEMO_TA				ACTIVE
313	103	Component	Street	Component			
141	DEMO_ASSE...	Component	0918-04	Component			
131	MH-10001	Wastewate...	Manhole	Point			
121	TEST1	Component	0918-04	Component	error		

2. Click **New**.
3. Select the **Condition Assessment** from the drop-down list.
4. Click **Submit**.  
Civic Platform displays the Asset ID search form.
5. Enter search criteria as needed to locate the asset you are seeking.
6. Click **Submit**.  
Civic Platform returns a list of assets meeting the search parameters.

Asset ID	Asset Name	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
SL-0002			Street	Light	Point			In Service	01/31/2012

7. Select each asset you want to add to the condition assessment.
8. Click **Select**.  
The Condition Assessment ID detail portlet displays.
9. Enter available data in the Asset Condition Assessment fields as needed. See [Asset Condition Assessment Detail Fields](#) for field definitions.
10. Click **Save**.  
Civic Platform updates the Asset Condition Assessment detail portlet.

## Viewing and Editing an Asset Condition Assessment

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You can modify assessment records as needed. For example, you can attach documents and images (see [Managing Asset Condition Assessment Attachments](#)), you link work orders to the assessment (see [Associating a Work Order to an Asset Condition Assessment](#)), and you can reschedule the assessment (see [Rescheduling an Asset Condition Assessment](#)).

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See for information about using Search.  
Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to view.  
The Asset Condition Assessment ID detail portlet displays.
3. Modify the Assessment Detail fields as needed. See [Asset Condition Assessment Detail Fields](#) for field definitions.



**Note:**

The following fields are not editable: Asset ID, Asset Group, Asset Type, Class Type, and Condition Assessment.

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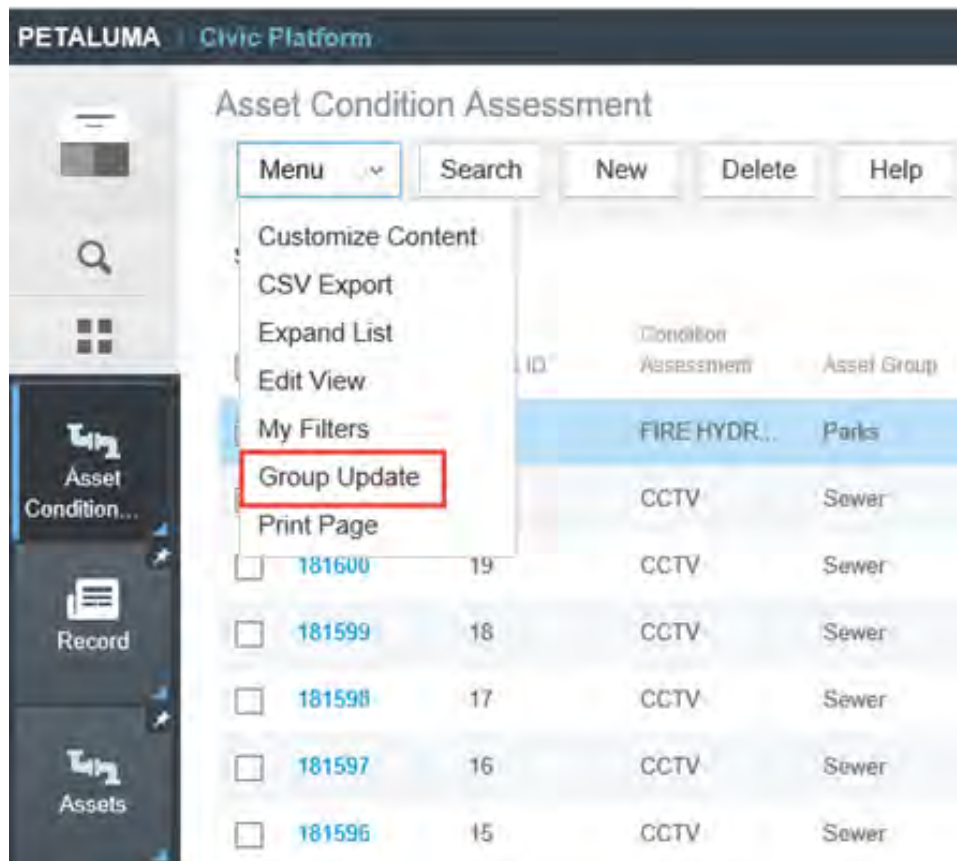
4. Click **Submit**.



## Group Updates for Condition Assessments

You can edit or update multiple Asset Condition Assessments at the same time if they all require the same change with the Group Update feature. For example, you can add the same Schedule Status to all the records using the Group Update function.

To use this feature, FID 8601-Asset Condition Assessment Group Update must be enabled.



### To perform a Group Update on Condition Assessments

1. Navigate to **Asset Condition Assessments**.
2. Select the Condition Assessment that contains the details you want to apply to other Conditions Assessments.
3. In the Asset Condition Assessment details area, update those details as appropriate and click **Save**.
4. Select the other Condition Assessments that you want to update with the same details.
5. Go to **Menu > Group Update**.
6. Edit the Condition Assessments with the new values.
7. Click **Save**.

## Rescheduling an Asset Condition Assessment

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When an inspector cannot perform an assessment because of a scheduling conflict, an inability to access the assessment site, or because an asset is not ready for assessment, you can reschedule the assessment.

### To reschedule an asset condition assessment

1. Navigate to the Asset Condition Assessment portlet and use Search to locate the assessment you want to reschedule. See [Using the Search Features](#) for information about using Search.
2. Click the link for the **Assessment ID** you want to reschedule.  
Civic Platform displays the Asset Condition Assessment detail portlet.
3. Modify the date and time fields as needed.
4. Update any other fields as necessary in the Asset Condition Assessment detail portlet.
5. Click **Save**.  
Civic Platform saves and updates the Asset Condition Assessment with your changes.

## Working with Asset Condition Assessment Observations

An inspector can record his observations about the condition of an assessment, and update his observations later if needed.

### Topics

- [Creating an Asset Condition Assessment Observation](#)
- [Viewing and Editing an Asset Condition Assessment Observation](#)

### Creating an Asset Condition Assessment Observation

Most agencies pre-define assessment observation formats to accommodate specific assessment types and specific attributes. The inspector can then use these formats as a guideline when performing an assessment. For example, when an inspector assesses a vehicle, he inspects everything with great detail. Do the headlights and taillights function properly? Are seat belt latches in good condition? Are the windshields free of cracks and chips? Are the rear view mirrors intact? A pre-defined observation format serves as a checklist for the inspector, and his observation results help determine what needs repair. Civic Platform can then generate work orders for needed repairs.

To support the assessment process, inspectors can use the Observation Documents tab to upload supporting documents and files such as diagrams, drawings, or photos. See [Managing Asset Condition Assessment Attachments](#) for more information about attaching documents and photos to an assessment observation record.

If your agency associates assessment observations with weighting factors, Civic Platform updates the assessment condition rating. The condition rating determines the value of the asset attribute as observed during the assessment. For more information about the formula used to determine these values, contact your agency administrator.

#### To create an asset condition assessment observation

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search. Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to report on. The Asset Condition Assessment ID detail portlet displays.
3. Click the Observation tab. The Asset Condition Assessment Observation list portlet displays.

	BUILD_SQAR (Number)	BUILD_UNIQ (Number)	HYD_SOURCE (Text)	HORCODE (Number)	HYD_NUMBER (Number)	Fleet-demo (Yard) (Date)
<input type="checkbox"/>	48	8			56	11/09/2010
<input type="checkbox"/>	29	78			14	11/09/2010

4. Click **Add**. Civic Platform adds a new observation row to the detail portlet.

Condition Assessment ID: 353

Save Add Delete Help

Detail Observation (2) Documents (0) Ratings (0) Work Order (0)

	BUILD_SQAR (Number)	BUILD_UNIQ (Number)	HYD_SOURCE (Text)	HORCODE (Number)	HYD_NUMBER (Number)	Fleet-demo (Yard) (Date)
<input type="checkbox"/>	48	8			56	11/09/2010
<input type="checkbox"/>	29	178			14	11/09/2010
<input type="checkbox"/>						--Select--

5. Complete the fields in the row with available data.

6. Click **Save**.

Civic Platform saves the new observation record.

## Viewing and Editing an Asset Condition Assessment Observation

You view and modify observation data as needed.

### To edit an asset condition assessment observation

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to report on.  
The Asset Condition Assessment detail portlet displays.
3. Click the Observation tab.  
The Asset Condition Assessment Observation list portlet displays.
4. Modify the observation fields as needed.
5. Click **Save**.  
Civic Platform saves your observation data.

## Managing Asset Condition Assessment Attachments

You can upload images and documents as needed in support of your assessment findings and remove any that are no longer relevant.

### Topics

- [Uploading an Asset Condition Assessment Attachment](#)
- [Downloading and Viewing Asset Condition Assessment Attachment](#)
- [Deleting an Asset Condition Assessment Attachment](#)

### Uploading an Asset Condition Assessment Attachment

During an asset condition assessment, the inspector may take photos or create a diagram with detailed condition information. He can upload and attach his photo files and diagram files to the Civic Platform assessment record.

#### To upload an attachment

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search. Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to report on. The Asset Condition Assessment detail portlet displays.
3. Click the Documents tab.
4. Click **New**.  
Civic Platform displays Document detail portlet.

Condition Assessment ID: 353

Menu Save Add Delete Cancel Help

Detail Observation **Documents** Ratings Work Order

Document Group/Category  
--Select-- --Select--

Description

Source \*  
ACCELA

Department **Current Department**  
Engineering Department

5. Complete the fields with available data. See [Asset Condition Assessment Document Attachment Fields](#) for field definitions.
6. Click **Add** to add another attachment, then complete the document attachment fields with available data.
7. Click **Save**.  
Civic Platform displays a confirmation message.
8. Click **Cancel** to review attached documents.  
Civic Platform updates the documents list portlet.

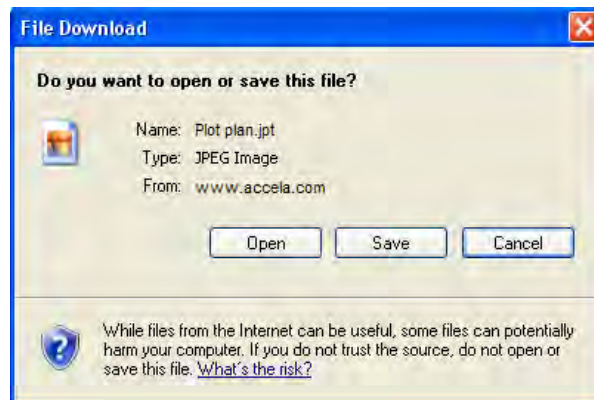
Condition Assessment ID: 353								
<span>Menu</span> <span>New</span> <span>Info</span> <span>Download</span> <span>Delete</span> <span>Help</span>								
<span>Detail</span> <span>Observation (2)</span> <span>Documents (1)</span> <span>Ratings (0)</span> <span>Work Order (0)</span>								
Entity ID	File Name	Category	Description	Size	Type	Modified Date	Modified By	Source
<input type="checkbox"/> 353	Accela.jpg	Plot Plan		62.06 KB	image/jpeg	02/07/2013	John Q Smith	ACCELA

## Downloading and Viewing Asset Condition Assessment Attachment

After you attach a file to an assessment record, the file is available to download and use as part of the assessment process.

### To download and view an asset condition assessment attachment

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search.. Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to report on. The Asset Condition Assessment detail portlet displays.
3. Click the Documents tab. Civic Platform displays the Asset Condition Assessment Documents list portlet.
4. Select the files you want to download, and click **Download**. You are prompted to confirm the download.



5. To view the document, click **Open**.

## Deleting an Asset Condition Assessment Attachment

You can remove attachments as needed that are incorrect or no longer relevant.



### Note:

When deleting an attached file, Civic Platform does not ask you to confirm the deletion. Once you click **Delete**, Civic Platform removes the attachment.

### To delete an attachment

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search. Civic Platform displays the Asset Condition Assessment list portlet.

2. Click the **Condition Assessment ID** link for the assessment you want to report on.  
The Asset Condition Assessment detail portlet displays.
3. Click the Documents tab.  
Civic Platform displays the Asset Condition Assessment Documents list portlet.
4. Select each attachment you want to delete.
5. Click **Delete**.  
Civic Platform removes the file from the selected Condition Assessment ID.

## Working with Asset Condition Assessment Ratings

Civic Platform generally calculates asset ratings using a rating formula that your agency administrator created. This formula can take into account asset details, asset attributes, condition assessment details, and condition assessment attributes.

Your administrator can set a rating to run when a an inspector completes a condition assessment. Inspectors can also enter a rating manually. In both cases, the rating displays in the Ratings portlet for the condition assessment record.

You can enter ratings manually, independent of any system event. For example, if you are conducting a scheduled assessment of one asset but happen to notice an unexpected deterioration of another asset, you may want to enter a brief rating of the damaged asset in Civic Platform.

Civic Platform time-stamps and saves each rating value for an asset, which provides users with a historical log of past ratings.

### Topics

- [Viewing Condition Assessment Ratings](#)
- [Pre-Calculating a Condition Assessment Rating](#)

### Viewing Condition Assessment Ratings

You can view an asset's current rating and other rating details in the Ratings tab on the Asset Condition Assessment portlet. You can also see whether the current value is a pre-calculated value or if the current value is a rating triggered by completion of a condition assessment. See [Pre-Calculating a Condition Assessment Rating](#) for information about pre-calculated ratings.

You can also view an asset's condition assessment rating from the Ratings tab on the Asset record. For information about viewing an asset record, see [Viewing Assets](#).

#### To view condition assessment ratings

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment you want to report on.  
The Asset Condition Assessment detail portlet displays.
3. Click the Ratings tab.  
Civic Platform displays the current rating(s) for this condition assessment.

Condition Assessment ID: 313							
Menu ▾ Pre-calc Help							
Detail Observation (5) Documents (0) Ratings (1) Work Order (0)							
Rating Type	Pre-calc	Rating Value	Previous Rating	Department	Inspector	Type	Rating Date
AAM	Y	10	1	DEMO/BUIL...	John Q Smith	Calc	05/13/2010 12:00 AM

### Pre-Calculating a Condition Assessment Rating

You can pre-calculate a rating value for a condition assessment without completing the condition assessment, which enables you the ability to get a current view of an asset's condition.

#### To pre-calculate a condition assessment rating



1. Navigate to the Asset Condition Assessment portlet and create a new assessment record, or use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search.

The Asset Condition Assessment detail portlet displays.

2. Click the Ratings tab of the new condition assessment.

The Ratings portlet for the condition assessment displays.

3. Click Pre-calc.

Civic Platform calculates any rating formulas attached to this condition assessment.

## Working with Asset Condition Assessment Work Orders

Asset assessments often alert agencies to problems that need attention. A work order is the starting point in the repair process. Associating a work order with an assessment helps track the work order's progress.

### Topics

- [Creating a Work Order for an Asset Condition Assessment](#)
- [Associating a Work Order to an Asset Condition Assessment](#)

### Creating a Work Order for an Asset Condition Assessment

The first step towards resolving problems or issues that an asset condition assessment exposes, is to create a work order.

#### To create a new work order for an asset condition assessment

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search. Civic Platform displays the Asset Condition Assessment list portlet.
2. Click the **Condition Assessment ID** link for the assessment that needs a work order. Civic Platform displays the Asset Condition Assessment detail portlet.
3. Click the Work Order tab. The Asset Condition Assessment Work Order list portlet displays.

<input type="checkbox"/>	<a href="#">Record ID</a>	<a href="#">Status</a>	<a href="#">Record Type</a>	<a href="#">Asset Cost</a>	<a href="#">Priority</a>	<a href="#">Total Job Cost</a>	<a href="#">Opened Date</a>	<a href="#">Alternate ID</a>
<input type="checkbox"/>	07WTR-00000-00007		AMS/Water/Hydrant/Flush	\$0.00			12/13/2007	07WTR-00000-00007

4. Click **New**. A Record Type Select pop-up displays.

5. Select a Work Order Template or Work Order Type. Civic Platform displays the fields relevant to the selected template or type in the New Record By Single portlet.
6. Complete the fields with available data.
7. Click **Submit**. Civic Platform creates the work order and then returns to the Asset Condition Assessment Work Order list portlet.

## Associating a Work Order to an Asset Condition Assessment

Associate a work order to an assessment to help your agency track the repairs related to the assessment. For example, if a vehicle assessment keeps revealing the same problems, previous work orders show this pattern, and an inspector knows what problem to look for in future assessments.

### To link a work order to an asset condition assessment

1. Navigate to the Asset Condition Assessment portlet and use search to locate the assessment record you want to work with. See [Using the Search Features](#) for information about using Search.

The Asset Condition Assessment list portlet displays.

2. Click the Condition Assessment ID link for the assessment to which you want to link a work order. The Asset Condition Assessment detail portlet displays.

3. Click the Work Order tab.

Civic Platform displays the Asset Condition Assessment Work Order list portlet.

Condition Assessment ID: 32							
<input type="button" value="Menu"/> <input type="button" value="Look Up"/> <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>							
Detail		Observation (1)	Documents (0)	Ratings (0)	Work Order (1)		
<input type="checkbox"/> Record ID	Status	Record Type	Asset Cost	Priority	Total Job Cost	Opened Date	Alternate ID
<input type="checkbox"/> 07WTR-00000-00007		AMS/Water/Hydrant/Flush			\$0.00	12/13/2007	07WTR-00000-00007

4. Click **Look Up** and enter the search criteria needed to locate the work orders you are looking for.

5. Click **Submit**.

Civic Platform returns a list of work orders matching the lookup criteria.

Condition Assessment ID: 32						
<input type="button" value="Menu"/> <input type="button" value="Select"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>						
Detail		Observation (1)	Documents (0)	Ratings (0)	Work Order (1)	
<< 1 >>						
<input type="checkbox"/> Record ID	Short Notes	Record Type	Status	Opened Date	Priority	
<input type="checkbox"/> 13AST-00000-00001	Alex	AMS/Street/Light/Relamp		02/07/2013		
<input type="checkbox"/> 12AAM-00000-00007		AMS/AAM641/AAM641/AAM641		10/17/2012		
<input type="checkbox"/> 12AAM-00000-00006		AMS/AAM641/AAM641/AAM641		10/17/2012		
<input type="checkbox"/> 12AAM-00000-00001		AMS/AAM641/AAM641/AAM641		07/11/2012		
<input type="checkbox"/> 12WTR-00000-00007		AMS/Water/Hydrant/Flush		07/11/2012		

6. Select each work order you want to link to the asset condition assessment.

7. Click **Select**.

Civic Platform links the asset condition assessment to the work order.

Condition Assessment ID: 32									
<a href="#">Menu</a> <a href="#">Look Up</a> <a href="#">New</a> <a href="#">Delete</a> <a href="#">Help</a>									
<a href="#">Detail</a> <a href="#">Observation (1)</a> <a href="#">Documents (0)</a> <a href="#">Ratings (0)</a> <a href="#">Work Order (3)</a>									
2 selected records added successfully.									
<input type="checkbox"/>	<a href="#">Record ID</a>	<a href="#">Status</a>	<a href="#">Record Type</a>	<a href="#">Asset Cost</a>	<a href="#">Priority</a>	<a href="#">Total Job Cost</a>	<a href="#">Opened Date</a>	<a href="#">Alternate ID</a>	<a href="#">Short Notes</a>
<input type="checkbox"/>	<a href="#">07WTR-00000-00007</a>		AMS/Water/Hydrant/Flush			\$0.00	12/13/2007	<a href="#">07WTR-00000-00007</a>	
<input type="checkbox"/>	<a href="#">12WTR-00000-00008</a>		AMS/Water/Hydrant/Flush			\$135.00	07/11/2012	<a href="#">12WTR-00000-00008</a>	Alex
<input type="checkbox"/>	<a href="#">13AST-00000-00001</a>		AMS/Street/Light/Relamp			\$0.00	02/07/2013	<a href="#">13AST-00000-00001</a>	Alex

## Managing Condition Assessment Assignments and Costs

---

You can add assignments and costs to an asset during condition assessments for time, labor and materials. Because Civic Platform creates every condition assessment against an asset, if you add an assignment or cost to a condition assessment, you are adding the assignment or cost to the asset under the condition assessment. The cost, together the costs that you recorded on work orders for the asset, result in the total cost that occurred on the asset.

### Topics

- [Adding a Condition Assessment Assignment or Cost](#)
- [Editing Condition Assessment Assignments and Costs](#)
- [Searching for an Assignment or Cost Item](#)
- [Deleting an Assignment or Cost Item from a Condition Assessment](#)
- [Converting Assignments to Costs](#)

### Adding a Condition Assessment Assignment or Cost

You can add cost items to a condition assessment either as assignments or costs.

- Assignments are the cost item arrangement for the condition assessment. They do not comprise the total condition assessment cost but can be converted into costs.
- Costs are the actual spending on a condition assessment and comprise the total condition assessment cost.

### Topics

- [Looking Up Cost Items to Add Assignments or Costs](#)
- [Looking Up Cost Groups to Add Assignments or Costs](#)
- [Adding a New Assignment or Cost](#)

### Looking Up Cost Items to Add Assignments or Costs

You can search the cost items defined by your agency administrator and add them as assignments or costs into a condition assessment.

#### To look up cost items and add assignments or costs

1. Navigate to the Condition Assessments portlet and use Search to locate and select the condition assessment you want to add assignments or costs to.  
Civic Platform displays the condition assessment detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the condition assessment. Notice the line directly below the row of tabs where the Estimated Cost and Total Cost are listed. The Estimated Cost is the sum of the total costs of all assignment items in the list. The Total Cost is the sum of the total costs of all the cost items in the list.

Condition Assessment ID: 353

Menu Look Up New Convert to Cost Cost Group Management Delete Help

Detail Observation (2) Documents (1) Ratings (0) Work Order (0) Assignments and Costs (2)

Estimated Cost: 0.00 Total Cost: 0.00

Cost ID	Type	Cost Type	Cost Item	Fixed Rate	Unit Rate	Unit of Measure	Quantity	Cost Date	Total Cost	Cost Account
<input type="checkbox"/> 2	Cost	Equipment	VEH-305	0	0	Mile		02/11/2014	0	Account3
<input type="checkbox"/> 3	Cost	Equipment	gaby	0	0	Days		02/11/2014	0	Account1

3. Click **Look Up**.

4. Select **Look up by Cost Item** from the drop-down menu.

Civic Platform displays detail fields associated with the cost item.

Condition Assessment ID: 353

Menu Submit Reset Cancel Help

Detail Observation (2) Documents (1) Ratings (0) Work Order (0) Assignments and Costs (2)

Cost Type: --Select--

Fixed Rate:

Default Cost Account: --Select--

Record Status: Active

Cost Item:

Unit Rate:

Cost Subgroup:

Default Cost Factor: --Select--

Unit of Measure: --Select--

Description:

[check spelling](#)

5. Choose an option from the **Cost Type** drop-down list and/or complete the fields associated with the cost item you are searching for.

6. Click **Submit**.

Civic Platform returns a list of condition assessment cost items matching your search parameters.

7. If you are adding a single cost item, select the cost item you want to associate with the condition assessment, and then complete the fields with available data (see [Asset Condition Assessment Costing Fields](#) for field definitions). If you are adding multiple cost items, go to the next step.

If you are assigning an asset or human resource to the condition assessment, you can select the asset or human resource, and then click **Resource Calendar** to view the availability of the asset or human resource.

Multi-Resource Calendar View [Help](#)

02/08/2014 -- 02/14/2014 Busy

Resource Name	12:00 AM	01:00 AM	02:00 AM	03:00 AM	04:00 AM	05:00 AM	06:00 AM	07:00 AM	08:00 AM
<input type="checkbox"/> All									
<input type="checkbox"/> ANDERSON									

[View More](#) [Remove](#)

8. If you are adding multiple cost items,

a. Select the first cost item you want to associate with the condition assessment and complete the fields with available data. See [Asset Condition Assessment Costing Fields](#) for field definitions. Use the Resource Calendar to view the availability of the assets or human resources as needed (see previous step).

b. Select the next cost item that you want to associate with the condition assessment.

The following fields auto-populate, provided you entered data into the same fields for the previous cost item, and provided you have not entered data into the current cost item fields: Type, Quantity, Date, Start Time, End Time, and All Day Event checkbox.



**Note:**

When you select the next cost item, the values of the cost item preceding the new item are auto-populated to the newly marked item unless the newly marked item had previously entered data. Previously entered data is not overwritten.

EXAMPLE: Cost item one is added as Type = Assignment, Quantity = 1, and Start/End times = 3:00pm-4:00pm. Cost item two has the same values for all of the fields, so when you select the second item, all of the item one data values copy to the item two fields. Cost item three has the same values for all the fields except for Quantity. For Cost item three, Quantity = 5. Enter 5 in the Quantity field, then check the box to select the third item. All of the item two data values except for Quantity copy to the item three fields.

- c. You can accept the auto-populated data, and repeat the previous step for subsequent cost items that you want to add, or you can modify the one or more of the values in the fields for the new cost item.

**9. Click Select.**

Civic Platform creates an association between the selected assignment and cost items and the condition assessment, and it displays them in a list.

## Looking Up Cost Groups to Add Assignments or Costs

If you work frequently with certain cost items, you can apply the cost group management functionality to group the cost items as needed. This enables you to look up and add costs by group, adding each cost item in the group to condition assessments in a single step.



**Note:**

The Assignments and Costs tab in the Condition Assessment portlet applies the same cost group management functionality as the Assignments and Costs tab in the Work Orders portlet. For information on cost group management, see [Looking Up Cost Groups to Add Assignments or Costs](#) in the Work Orders section of this document.

### To look up cost groups and add assignments or costs

1. Navigate to the Condition Assessments portlet and use Search to locate and select the condition assessment you want to add assignments or costs to.  
Civic Platform displays the condition assessment detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the condition assessment.
3. Click **Look up**.
4. Select **Look up by Cost Group** from the drop-down menu.  
Civic Platform displays the cost group selection drop-down list.

The screenshot shows a web interface for 'Assignments and Costs (2)'. At the top, there are three buttons: 'Go To', 'Assignments and Costs (2)', and 'Calendar'. Below these is a 'Group Name' dropdown menu with a red asterisk next to the label. The dropdown menu is currently set to '--Select--'.

5. Choose the cost group name you want to use, and click **Submit**.

Civic Platform returns a list of all condition assessment cost items in the cost group. You can use the auto-populate feature to add multiple cost items quickly and efficiently.

6. If the cost items you are adding have similar data (such as Type, Quantity, Date, Start Time, End Time, and/or All Day Event), do the following:
  - a. Select the first cost item you want to associate with the condition assessment and complete the fields with available data. See [Asset Condition Assessment Costing Fields](#) for field definitions.  
If you are assigning assets or human resources to the condition assessment, you can select the assets or human resources, and then click **Resource Calendar** to view the availability of the assets or human resources in a calendar. The calendar displays in date range view.
  - b. Select the next cost item in the group that you want to associate with the condition assessment.  
The following fields auto-populate, provided you entered data into the same fields for the previous cost item, and provided you have not entered data into the current cost item fields: Type, Quantity, Date, Start Time, End Time, and All Day Event checkbox.



**Note:**

When you select the next cost item, the values of the cost item preceding the new item are auto-populated to the newly marked item unless the newly marked item had previously entered data. Previously entered data is not overwritten.

EXAMPLE: Cost item one is added as Type = Assignment, Quantity = 1, and Start/End times = 3:00pm-4:00pm. Cost item two has the same values for all of the fields, so when you select the second item, all of the item one data values copy to the item two fields. Cost item three has the same values for all the fields except for Quantity. For Cost item three, Quantity = 5. Enter 5 in the Quantity field, then check the box to select the third item. All of the item two data values except for Quantity copy to the item three fields.

- c. You can accept the auto-populated data, and repeat the previous step for subsequent cost items that you want to add, or you can modify the one or more of the values in the fields for the new cost item.
7. Double check the auto-populated values and make any needed adjustments.
8. Click **Select**.  
Civic Platform creates an association between the selected assignment and cost items and the condition assessment, and it displays them in a list.

## Adding a New Assignment or Cost

In some circumstances you may want to add a new assignment or cost to a condition assessment directly.

### To add a new assignment or cost

1. Navigate to the Condition Assessments portlet and use Search to locate and select the condition assessment you want to work with.  
Civic Platform displays the condition assessment detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the condition assessment.
3. Click **New**.  
Civic Platform displays the fields related to cost items.
4. Select the **Cost Type** and **Cost Item**, then set the **Type** to **Assignment** or **Cost**.



5. Complete the fields with available data. See [Asset Condition Assessment Costing Fields](#) for field definitions.

If you are assigning an asset or human resource to the condition assessment, you can click the **Show Calendar** link besides the **Date** field to view the availability of the asset or human resource in a calendar. The calendar that displays is the same one shown on the Calendar tab of the Assets portlet. For more information about the calendar, see [Working on the Asset Calendar](#) .

6. Click **Submit**.

Civic Platform creates an association for the selected assignment or cost item with the condition assessment and displays the condition assessment assignments and costs list.

## Editing Condition Assessment Assignments and Costs

You can edit the assignments and costs for a condition assessment as needed, and as permitted.



### Note:

If all of the fields are read-only, and a cost item needs to be updated, please contact your system administrator.

### To edit condition assessment assignments and costs

1. Navigate to the Condition Assessments portlet and use search to locate and select the condition assessment you want to work with.  
Civic Platform displays the detail of the condition assessment selected.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the condition assessment.
3. Open the assignment or cost item you want to view or edit.  
Civic Platform displays detail fields associated with the cost item.
4. Make changes as needed. See [Asset Condition Assessment Costing Fields](#) for field definitions
5. Click **Submit**.  
Civic Platform returns a list of all cost items associated with the condition assessment.

### Searching for an Assignment or Cost Item

You can use the **Look Up** button on the Assignments and Cost tab to locate assignment and cost items. For more information about searching in Civic Platform, see [Using the Search Features](#) .

### Deleting an Assignment or Cost Item from a Condition Assessment

When a cost item is deleted, the association between the cost item and the condition assessment is removed. However, the cost item is still available in the cost item definition list and you can use it to associate with other condition assessments.

#### To delete a condition assessment assignment or cost item

1. Navigate to the Condition Assessments portlet and use Search to locate and select the condition assessment you want to work with.  
Civic Platform displays the detail of the condition assessment selected.
2. Click the Assignments and Costs tab.

Civic Platform displays a list of existing assignment and cost items associated with the condition assessment.

3. Select the cost item(s) you want to remove.

4. Click **Delete**.

Civic Platform displays a message indicating record(s) deleted successfully.

## Converting Assignments to Costs

When managing a condition assessment, you may find that an assignment that is associated with the condition assessment needs be converted to a cost.

### To convert an assignment to cost

1. Navigate to the Condition Assessments portlet and use Search to locate and select the condition assessment you want to work with.

Civic Platform displays the detail of the condition assessment selected.

2. Click the Assignments and Costs tab.

Civic Platform displays a list of existing assignment and cost items associated with the condition assessment.

3. Select each assignment item that you want to convert to costs. You can select multiple assignments. However, if an assignment is converted to cost before, you cannot do it again.

4. Click **Convert to Cost**.

If the cost type is human resource, Civic Platform displays a Usage/Time Tracking window.

5. Enter the usage/time tracking information for the cost item, and click **Submit**.

Civic Platform generates a cost item for each selected assignment while still keeping the assignment entry.

## Examining Asset Condition Assessment Details

The following tables list and define the default fields available in the asset condition assessment user interfaces.

### Tables

- [Asset Condition Assessment Detail Fields](#)
- [Asset Condition Assessment Document Attachment Fields](#)
- [Asset Condition Assessment Costing Fields](#)

### Asset Condition Assessment Detail Fields

The following table lists and defines fields that may be available as you work with Asset Condition Assessments.

Table 75: Asset Condition Assessment Detail Fields

Read-only fields for reviewing only:	
<b>Asset Group</b>	The asset group. For example: Water or Street. An Asset Group is an agency-defined collection of objects the agency owns or maintains.
<b>Asset ID</b>	The numbering sequence used to identify the asset. An Asset ID is the unique identification for an asset.
<b>Asset Type</b>	The type of asset. For example: Hydrant or Manhole. An Asset Type is an agency-defined classification of similar objects that share the same standard asset attributes. Multiple asset types can share the same Class Type.
<b>Class Type</b>	The class type. A class type is how Civic Platform groups objects that an agency owns or maintains. Asset class types provide the ability to assign or group multiple asset types together.
<b>Condition Assessment</b>	The type of condition assessment.
Activated fields available for editing:	
<b>Comments</b>	General comments.
<b>Department</b>	The department responsible for the assessment. The selection may change the names listed in the Inspector drop-down menu.
<b>Inspection Date</b> <b>Inspection Time</b>	The inspection start (from) and end (to) dates from the calendar icon. The time of the inspection.
<b>Inspector</b>	The name of the inspector responsible for the assessment.
<b>Schedule Date</b> <b>Schedule Time</b>	The start (from) and end (to) dates from the calendar icon: The Schedule Time from the drop-down list.
<b>Status</b>	The status of the condition assessment: Completed or Scheduled.
<b>Time Spent (Hours)</b>	The amount of time spent on the assessment. If enabled, you may enter a range when searching where the desired amount of time spent is between the upper (From) and lower (To) values.

### Asset Condition Assessment Document Attachment Fields

The following table lists and defines fields that may be available as you work with attachments to asset condition assessment records.

Table 76: Asset Condition Assessment Document Attachment Fields

<b>Document Group/Category</b>	A document group that relates to the asset condition assessment ID. The selection that you make affects the options in the adjacent category drop-down menu. For example, the types of document categories might be Photos or Engineering drawings.
<b>Document Name</b>	A name for the document attachment. For example, Image of 1 of 3 Pavement Section.
<b>Description</b>	A description about the attachment. For example, This is the inside circle of the circular pavement. Depending on the option selected, either Description or Document Description field displays.
<b>Source (or EDMS Name)</b>	The name of the electronic document management system (EDMS) where you want to store the attachment. Consult your agency administrator if you need assistance with this field.
<b>File Name [Browse]</b>	The file name of an attached document. Use the Browse link to locate the file.

## Asset Condition Assessment Costing Fields

The table below lists and defines the fields that may be available when costing a condition assessment.

Table 77: Costing Field Descriptions

<b>Cost Account</b>	The cost account where the units should be added or subtracted from when associating with a condition assessment.
<b>Cost ID</b>	The identification number populates automatically when you click Submit.
<b>Cost Item</b>	The name for the cost item.
<b>Cost Type</b>	This is the type of cost. For example, contract, employee, materials.
<b>Current Asset Usage</b>	The current usage of the asset. This field displays only when you are assigning an asset as a cost to the condition assessment, and the asset type is associated with usage types in the administrator portlet.
<b>Date</b>	The date when the costing is done.
<b>Description</b>	The description for the cost item.
<b>End Time</b>	The end time of the assignment or cost item usage. Mark "All Day Event" if applicable.
<b>Fixed Rate</b>	The fixed cost rate to be used for the cost item.
<b>Quantity</b>	<p>The quantity of items included in this type. If your agency administrator did not configure the Standard Choice COST_FACTOR, when you add a new cost item to a condition assessment, you can specify only one quantity for the cost item.</p> <p>If your agency administrator configured the Standard Choice COST_FACTOR, when you add a new cost item to a condition assessment, the Quantity section of the Cost Item New form provides several cost factors, for example, Regular, Overtime, and Holiday. You can enter quantities by cost factors.</p>
<b>Record Status</b>	Read-only field. It indicates whether the cost item record is active or inactive in the administrator portlet.
<b>Start Time</b>	The start time of the assignment or cost item usage. Mark "All Day Event" if applicable.
<b>Time Accounting Group</b>	The Time Accounting group. This field displays only when you are assigning human resources as a cost to the condition assessment, and the selected user profile is associated with a Time Accounting group.
<b>Time Accounting Type</b>	The Time Accounting type. This field displays only when you are assigning human resources as a cost to the condition assessment, and the selected user profile is associated with a Time Accounting type.

<b>Time Elapsed</b>	The actual work time of the cost item (human resource). This field displays only when you are assigning human resources as a cost to the condition assessment, and the selected user profile is associated with a Time Accounting type.
<b>Total Cost</b>	<p>Automatically calculated according to the formula below. If there are no cost factors for the cost items:</p> $\text{Total Cost} = \text{Fixed Rate} + \text{Quantity} * \text{Unit Rate} * \text{Default Cost Factor}$ <p>If there are multiple cost factors for the cost items: Total Cost = Fixed Rate + Unit Rate * (Cost Factor #1 * Quantity #1 + Cost Factor #2 * Quantity #2 +...+ Cost Factor #n * Quantity #n)</p>
<b>Type</b>	Select the type from assignment or cost.
<b>Unit Rate</b>	Enter the unit cost rate to be used for the cost item.
<b>Unit of Measure</b>	Use the drop-down list to select the unit of measure for the cost item.
<b>Updated Date</b>	Read-only field. It indicates when the cost item is last updated in the administrator portlet.
<b>Updated By</b>	Read-only field. It indicates the user account that last updated the cost item in the administrator portlet.
<b>Usage/Time Tracking</b>	This field contains three parts: Time Accounting Group, Time Accounting Type, and Time Elapsed.

## Part Inventory

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Choose a topic from the list below to learn more about working with part inventories and transactions.

### **Related Information**

[Part Inventory Overview](#)

[Working with Part Inventory](#)

[Managing Part Contacts](#)

[Managing Part Transactions](#)

[Tracking Work Order Parts](#)

[Examining Parts \(and Related\) Details](#)

## Part Inventory Overview

---

Civic Platform allows an agency to track usage and supply of consumable parts using the part inventory. Your agency may be responsible for maintaining assets such as a fleet of trucks. Maintaining a truck requires several different parts, one of these is an oil filter.

The part inventory tracks part availability, identifies where parts in the inventory are located, and identifies approved vendors. As oil filters are used, the available supply is automatically updated. If an agency has three trucks that are in need of an oil change, an oil change work order is generated. By using the part inventory you can find the total number of oil filters in stock and their location. If more oil filters are needed, you can find an approved vendor to reorder more filters.

All parts are listed in the part inventory list portlet. This portlet displays the part status, type, cost, current total supply, and many other useful details regarding the part. The agency administrator defines the items in the inventory list portlet. For information on setting up part contacts or part locations, please contact your agency administrator.

Your Civic Platform environment and the tasks you perform depend on your agency's implementation package and the way your agency administrator set up Civic Platform, including access permissions assigned to your Accela User Name.

## Working with Part Inventory

### Topics

- [Adding a New Part Inventory](#)
- [Editing Part Inventory](#)
- [Deleting Parts from the Part Inventory](#)
- [Attaching a Document to a Part](#)

### Adding a New Part Inventory

Use the part inventory to add one or more new parts. Each time you approve a new part and add it to the inventory, Civic Platform calculates and updates the total supply on hand. These parts are also available for use when you create part transactions and work orders. When an agency has more than one location for a part, the location and quantity on hand for the part updates when you create a part transaction. Civic Platform generates a part transaction each time that a user assigns a part to a work order, a location receives a part order, a part transfers between locations, or manual stock adjustments occur. For information about creating a part transaction, see [Managing Part Transactions](#).

#### To add a new part to the part inventory

1. Navigate to the Part Inventory portlet.  
Civic Platform displays the list of all parts in the parts inventory.
2. Click **New**.  
Civic Platform displays the part detail form.

The screenshot shows the 'Part Detail' form with the following fields and controls:

- Menu** (dropdown), **Submit**, **Reset**, **Cancel**, **Help** buttons.
- Tabs: **Part Detail** (selected), **Part Transaction**, **Part Contact**, **Part Supply**, **Attachments**.
- Part Number \***: Text input field.
- Part Description**: Text area with a **check spelling** link below it.
- Part Type**: Dropdown menu (value: --Select--).
- Part Status**: Dropdown menu (value: --Select--).
- Part Brand**: Text input field.
- Unit Cost**: Text input field (value: 0.0000).
- Unit of Measure \***: Dropdown menu (value: --Select--).
- Maximum Quantity**: Text input field (value: 0.0000).
- Taxable**: Dropdown menu (value: --Select--).
- Minimum Quantity**: Text input field (value: 0.0000).
- Total Supply**: Text input field (value: 0.0000).
- Reorder Quantity**: Text input field.
- Reorder Due**: Text input field (value: No).
- Calculate Type \***: Dropdown menu (value: Simple).
- Comments**: Text area with a **check spelling** link below it.
- Track Cost by Location**
- Reserved Quantity**: Text input field (value: 0.0000).
- Hard Reserve**: Text input field (value: 0.0000).

3. Enter the part number first, then enter the Units of Measure and Calculate Type.
4. Complete the remaining fields in the part details.  
For a description of the fields, see [Part Inventory Fields](#).
5. Click **Submit**.  
Civic Platform adds the part to your inventory.



## Editing Part Inventory

You can modify part inventory details as needed. For example, a vendor might no longer carry a brand of oil filters that your agency uses, but they carry a different brand for the same type of oil filter. You can go to the part inventory, find the oil filter, and then change the brand in the part details.



### Note:

To track the cost of a part based on its stock location, select the **Track Cost by Location** option.

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Some part supply details such as the minimum quantity, maximum quantity, reorder quantity, and unit cost, auto-calculate based on the quantities of a part at a stock location.

### To edit a part

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform. Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to review. Civic Platform displays the part details.
3. Update any of the fields that display. For a description of the fields, see [Part Inventory Fields](#).
4. Click **Submit**.

## Deleting Parts from the Part Inventory

You can remove a part from the part inventory. For example, you may have entered a part by mistake or your agency no longer has a use for a part.



### Note:

When you click **Delete**, Civic Platform does not prompt you to confirm the deletion before it removes the selected records. Double check that the parts you have marked for deletion are the ones you want to remove BEFORE you click **Delete**.

---

### To delete a part from the part inventory

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to remove. See [Using the Search Features](#) for information about performing a search in Civic Platform. Civic Platform returns a list of all parts that match your search parameters.
2. Select the parts that you want to remove from the inventory.
3. Click **Delete**. Civic Platform deletes the selected parts.

## Attaching a Document to a Part

You can attach document files and image files (such as PDF or JPG files) to a part record. For more information on how to attach a document to a part record, see [Attachments](#).

## Managing Part Contacts

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Part contacts are approved vendors and approved manufacturers that supply the agency with specific parts. You can link one or more contacts to a part and then use this information to interact with vendors and manufacturers for pricing, re-orders, and questions about the parts they supply. For information on how to set up a new part contact, please contact your system administrator.

### Topics

- [Linking a Part Contact to a Part](#)
- [Viewing Part Contact Details](#)
- [Deleting a Part Contact](#)

### Linking a Part Contact to a Part

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part details.
3. Click the Part Contact tab.  
Civic Platform displays the part contact list of contacts associated with part.
4. Click **Look Up** to display a list of search criteria you can use.
5. Enter search criteria as needed to locate the contacts that you want to link. For a description of the fields, see [Part Contact Fields](#).
6. Click **Submit**.  
Civic Platform displays the search results.
7. Select the contacts that you want to link to the selected part.
8. Click **Submit**.  
Civic Platform associates the selected contacts with the part and displays the associated part contact list.

### Viewing Part Contact Details

It may be necessary to speak with the vendor or manufacturer about a re-order. You can easily view the contact's name and phone number from the part contact list portlet. For information about updating the details of a part contact, see your system administrator.

#### To view the details of a part contact

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part inventory details.

3. Click the Part Contact tab.

Civic Platform displays the part contact list of contacts associated with the part.

4. Open the part contact that you want to view.

Civic Platform displays the part contact details.

## Deleting a Part Contact

When you delete a part contact as described in this section, you are not actually deleting the contact record. You are deleting the association between the part and contact. For information about deleting contact records from the master list, see your system administrator.

### To delete a reference to a part contact

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to remove. See [Using the Search Features](#) for information about performing a search in Civic Platform.

Civic Platform returns a list of all parts that match your search parameters.

2. Click the Part Number link for the part that you want to work with.

Civic Platform displays the part inventory details.

3. Click the Part Contact tab.

Civic Platform displays the part contact list of contacts associated with the part.

4. Select the part contacts that you want to dissociate.

5. Click **Delete**.

Civic Platform displays a message indicating that the part(s) deleted successfully.

# Managing Part Transactions

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## Topics

- [Creating a Part Transaction](#)
- [Voiding a Part Transaction](#)
- [Viewing the Part Supply](#)
- [Issuing a Reservation Transaction](#)
- [Updating a Reservation Transaction](#)

## Creating a Part Transaction

Whenever a user issues, transfers, reserves, removes, or adjusts a part record, Civic Platform creates a part transaction. These transactions identify the movement and use of specific parts and allow agencies to track usage and calculate the current supply. When a transaction takes place, Civic Platform updates the quantity on hand at the proper location based on the transaction type.

There are five part transaction types. Different fields display, depending on which part transaction type you choose to create.

- **The issue transaction** occurs either when someone requests and receives a part on the spot, or when someone receives a reserved part.
- **The receive transaction** occurs when someone purchases a part or returns a part to a location.
- **The transfer transaction** occurs when someone moves a part from one location to another.
- **The adjust transaction** occurs when someone makes quantity adjustments for cycle counts.
- **The reserve transaction** occurs when someone sets aside parts so they can issue them at a later date.

A hard reservation decreases the quantity on hand of the part by the quantity of the reservation so that the reserved quantity cannot be issued to another work order. A soft reservation is an alert to the warehouse that houses the part that someone may request the part. The quantity on hand of the part does not change with a soft reservation and someone can issue the part to another work order.

### To create a part transaction

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part inventory details.
3. Click the Part Transaction tab.  
Civic Platform displays the part transaction list associated with the part.

Part Number: 886						
<input type="button" value="Menu"/> <input type="button" value="Search"/> <input type="button" value="New"/> <input type="button" value="Void"/> <input type="button" value="Help"/>						
Part Detail		Part Transaction (1)		Part Contact (5)		Part Supply (1)
<input type="checkbox"/>	<a href="#">Transaction Number</a>	<a href="#">Transaction Type</a>	<a href="#">Transaction Date</a>	<a href="#">Hard Reservation</a>	<a href="#">From Reservation Number</a>	<a href="#">Reservation Status</a>
<input type="checkbox"/>	3104	VOID	12/26/2012	Yes		343

#### 4. Click **New**.

Civic Platform displays the part transaction form.

Part Number: 886		
<input type="button" value="Menu"/> <input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>		
Part Detail	Part Transaction	Part Contact
<b>Transaction Type *</b> RECEIVE <input type="button" value="v"/> <b>Transfer to Location</b> --Select-- <input type="button" value="v"/> <b>Part Number</b> 886 <b>Part Bin</b> <input type="text"/>	<b>Transaction Date</b> <input type="text"/> <b>Work Order ID</b> <input type="text"/> <b>Part Brand</b> 228 <b>Taxable</b> No <input type="button" value="v"/> <b>Part Description</b> 443 <input type="button" value="v"/> <b>Transaction Cost</b> <input type="text"/>	<b>Location Name *</b> --Select-- <input type="button" value="v"/> <b>Quantity *</b> <input type="text"/> <b>Part Type</b> <input type="text"/> <b>Unit of Measure</b> Foot <input type="button" value="v"/> <b>Comments</b> <input type="text"/> <a href="#">check spelling</a>
<b>Unit Cost</b> 0 <b>Alt ID</b> <input type="text"/>		

#### 5. Complete the fields that display. Some fields auto-populate with part detail information.

For a description of the fields, see [Part Transaction Fields](#).

#### 6. Click **Submit**.

### Voiding a Part Transaction

There may be various reasons to remove a part transaction. For example, you have a transaction associated with the wrong part or a transfer that never took place. You cannot remove part transactions because Civic Platform preserves the audit trail for the part, but you can void transactions. When you void a part transaction, it is no longer executable, meaning that the quantity on hand updates as if the transaction did not exist. The transaction record remains in the part transaction list for reference.

#### To void a part transaction

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform. Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with. Civic Platform displays the part inventory details.
3. Click the Part Transaction tab. Civic Platform displays the part transaction list associated with the part.

4. Select the part transaction that you want to void.
5. Click **Void**.  
Civic Platform displays a message indicating transactions(s) voided successfully.

## Viewing the Part Supply

Civic Platform tracks parts at multiple locations. Each location maintains a current total supply for each part. When a part transaction takes place, the quantity on hand updates at the proper location based on the transaction type. Civic Platform always calculates part supply as a result of part transactions. Users cannot manually enter or update these counts.

### To view the part supply

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part inventory details.
3. Click the Part Supply tab.  
Civic Platform displays the part supply list for all part locations.

<a href="#">Location Name</a>	<a href="#">Quantity on Hand</a>	<a href="#">Reserved Quantity</a>	<a href="#">Hard Reserve</a>	<a href="#">Quantity on Order</a>	<a href="#">Comments</a>	<a href="#">Maximum Quantity</a>
343	0.0000	0.0000	0.0000	0.0000		0.0000

4. To view the part supply details, click the location you want to review.

## Issuing a Reservation Transaction

To close out a reservation, create a new issue transaction and select the reservation you want to issue.

### To issue reserved parts

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part details.
3. Click the Part Transaction tab.  
Civic Platform displays the part transaction list associated with the part.
4. Click **New**.  
Civic Platform displays the fields related to the part transaction.
5. Select an issue transaction type from the drop-down list.  
Civic Platform displays the fields related to the Issue part transaction.
6. Complete the **Location Name** and **Quantity** fields.

7. Select the reservation you want to issue from the drop-down list of open reservations. The list includes all hard and soft reservations that are open.
8. Click **Submit**.  
Civic Platform completes the issue transaction.

## Updating a Reservation Transaction

You can change a reserve transaction from a soft reservation to a hard reservation, and vice versa. Perhaps you made a soft reservation of a part because a work order was in a tentative stage, and now the work order is active.

### To update a reservation

1. Navigate to the Part Inventory portlet and use Search to find the part that you want to work with. See [Using the Search Features](#) for information about performing a search in Civic Platform.  
Civic Platform returns a list of all parts that match your search parameters.
2. Click the Part Number link for the part that you want to work with.  
Civic Platform displays the part inventory details.
3. Click the Part Transaction tab.  
Civic Platform displays the part transaction list associated with the part.
4. Click the link for the reserve transaction you want to update. It must be an open reserve transaction.  
Civic Platform displays the transaction detail view.
5. Use the **Hard Reservation** drop-down menu to change the reservation type.
6. Click **Save**.  
Civic Platform updates the reserve transaction.

## Tracking Work Order Parts

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The parts inventory allows an agency to track the usage and the supply of consumable parts. As your agency uses parts, the available supply automatically updates, and Civic Platform maintains an accurate count of quantity on hand for the part and location.

Part transactions include issuing specific parts to a work order. When you take out parts from the stock on hand and issue them to a work order, Civic Platform generates an issue part transaction. When you save the transaction, Civic Platform decreases the quantity on hand by the transaction quantity and then increases the total cost of the work order by the cost of the transaction. For example, a new development in the city requires the installation of five new lamp posts. The lamp posts cost \$300 per unit. You generate a work order for the installation and Civic Platform issues the five lamp posts to the work order. Civic Platform generates an issue part transaction and then decreases the quantity on hand of lamp posts for the location by five. The total cost of the work order increases by \$1500, which is the total cost of the transaction.

If an asset you have linked to a work order has parts associated to it, you can add these standard parts to the work order. For information about adding standard parts to a work order, see [Adding Standard Parts](#). For information about associating parts to an asset, see [Managing Associated Parts](#).

### Topics

- [Creating Work Order Part Transactions](#)
- [Voiding Work Order Parts](#)

### Creating Work Order Part Transactions

You can create single or multiple work order part transactions as needed.

#### To create a work order part transaction

1. Navigate to the Work Orders portlet.  
Civic Platform displays the list of all work orders.
2. Click the Part ID link of the part you want to review.  
Civic Platform displays the work order details.
3. Click the Part tab.  
Civic Platform displays the part list associated with work order.
4. Click **Search**.  
Civic Platform displays the fields related to the part inventory.
5. Complete any of the fields that display.  
For a description of the fields, see [Work Order Parts Fields](#).
6. Click **Submit**.  
Civic Platform displays the results of the parts for the search criteria.
7. Select the part(s) that you want to issue to the selected work order.
8. Click **Submit**.  
Civic Platform generates an Issue part transaction and associates it with the work order.



## Voiding Work Order Parts

If you need to remove a work order part transaction from a work order, you can use the Void functionality. When you void a part transaction, all units identified within the transaction update the quantity on hand as if the transaction did not exist. The transaction record remains in the work order part transaction list for reference, but as a voided record. For information about deleting parts, see [Deleting Parts from the Part Inventory](#).

### To void a work order part

1. Navigate to the Work Orders portlet.
2. Click the Part ID link of the part you want to review.  
Civic Platform displays the work order details.
3. Click the Part tab.  
Civic Platform displays the part list associated with work order.
4. Select each part that you want to void.
5. Click **Void**.  
Civic Platform displays a message indicating record(s) voided successfully.

## Examining Parts (and Related) Details

The following tables list and define the default fields available in the different interfaces you may encounter.

- [Part Contact Fields](#)
- [Part Inventory Fields](#)
- [Part Transaction Fields](#)
- [Part Supply Fields](#)
- [Work Order Parts Fields](#)

### Part Contact Fields

The following table lists and defines the default fields on the Part Contact form.

Table 78: Part Contact Fields


<b>Address 1</b>	The first line of the contact's address.
<b>Address 2</b>	The second line of the contact's address, if needed.
<b>Business Name</b>	The business name for the contact.
<b>City</b>	The name of the city for the contact.
<b>Comments</b>	Comments about the contact.
<b>Contact Flag</b>	This contact flag identifies the type of contact: Manufacturer or Vendor.
<b>Contact Last Name</b>	The last name of the contact.
<b>Contact Middle Name</b>	The middle name of the contact.
<b>Contact Title</b>	The title of the contact.
<b>Contact Type</b>	The contact type.
<b>Email</b>	The email address for the contact.
<b>Fax</b>	The fax number for the contact.
<b>Phone</b>	The phone number for the contact.
<b>State</b>	The name of the state for the contact.
<b>Terms</b>	Terms associated with any contact arrangement.
<b>Zip Code</b>	The zip code for the contact.

### Part Inventory Fields

The following table defines the default fields on the Part Inventory.

Table 79: Part Inventory Fields

<b>Budget Account</b>	The budget account for tracking the transactions of the part. The Standard Choice BUDGET_ACCOUNT defines the account options in the list.
<b>Budget Number</b>	The budget number of the budget account that you select for the part.

<b>Calculate Type</b>	<p>The formula for calculating the average cost of a part. There are four available calculation formulas:</p> <p><b>Simple Average:</b> The average cost is equal to the sum of the unit cost of a current shipment and existing average cost, divided by two. This formula provides the average value of the existing average cost and the cost per unit of the current shipment.</p> <p><b>Weighted Average:</b> This is the same as the Simple Average, but weighted by quantity. "Weighted by quantity" means that the existing part quantity is multiplied by the existing average cost and then the quantity of the current shipment is multiplied by the unit cost of the shipment. The sum of these values is then divided by the total part quantity.</p> <p><b>FIFO:</b> This stands for first-in, first-out. If you select FIFO for a part, when you perform transactions (issue, transfer, adjust, or reserve) for the part, Civic Platform processes the parts in the inventory from the oldest supply in stock.</p> <p><b>LIFO:</b> This stands for last-in, first-out. If you select LIFO for a part, when you perform transactions (issue, transfer, adjust, or reserve) for the part, Civic Platform processes the parts in the inventory from the most recent supply in stock.</p> <p> <b>Note:</b> Both LIFO and FIFO track part costs across inventory locations. If you select FIFO or LIFO for a part, the Track Cost by Location option gets auto-selected, and you cannot freely change the unit cost of the parts that are already in stock.</p>
<b>Comments</b>	Any comments associated with the part.
<b>Hard Reserve</b>	The quantity set aside as hard reserved. If enabled, you may enter a range when searching, where the desired hard reserve quantity is between the upper (From) and lower (To) values.
<b>Maximum Quantity</b>	The maximum quantity of a part at its corresponding stock location.
<b>Minimum Quantity</b>	The minimum quantity of a part at its corresponding stock location.
<b>Original Part ID</b>	The vendor or manufacturer's original part number (optional).
<b>Part Brand</b>	The brand of the part. For example, Vavoline is the brand for motor oil.
<b>Part Description</b>	The description of the part.
<b>Part Number</b>	The number used to identify the part in the parts inventory list. This number may be the manufacturer part number or a number that your agency uses for the part.
<b>Part Status</b>	The status of the part.
<b>Part Type</b>	The type of part. Examples: Fittings, Fleet, Materials.
<b>Reorder Due</b>	Indicates whether the total supply is greater or lesser than the minimum quantity.
<b>Reorder Quantity</b>	<p>The reorder amount for the part.</p> <p>The amount you enter reflects the number of parts that you need to reorder for the stock location. This amount becomes the default value for new stock locations.</p>
<b>Reserved Quantity</b>	<p>The reserved quantity.</p> <p>When searching, enter the reserved quantity you are looking for. If enabled, you may enter a range, where the desired reserved quantity is between the upper (From) and lower (To) values.</p>
<b>Taxable</b>	Indicates whether or not the part is taxable.

<b>Track Cost by Location</b>	Indicates whether you want to track the cost of a part based on its stock location. If you select this option, Civic Platform tracks the unit cost at the location level, and the Unit Cost field becomes disabled.  If you do not select this option, the part detail price sets to zero, and you must update the unit cost for future transactions.
<b>Total Supply</b>	The total quantity on hand for the part displays in this field. When displayed in the Part Inventory portlet, this is a read-only field that updates automatically based on part inventory. When searching, enter the total supply figure you are looking for. If enabled, you may enter a range, where the desired total supply is between the upper (From) and lower (To) values.
<b>Unit Cost</b>	The unit cost of the part. If enabled, you may enter a range when searching.
<b>Unit of Measure</b>	The unit of measure for the part. Examples: each, gallon, foot.

## Part Transaction Fields

The following table defines the default fields on Part Transactions.

Table 80: Part Transaction Fields

<b>Alt ID</b>	An alternate ID for the part.
<b>Budget Account</b>	Read-only field. Displays the budget account of the part.
<b>Budget Number</b>	Read-only field. Displays the budget number of the part.
<b>Comments</b>	Any comments associated with the transaction.
<b>Hard Reservation</b>	Indicates if you want to guarantee your reservation, and subtract your order from the quantity on hand.
<b>Location Name</b>	The location for the transaction. When you select a location, the Unit Cost field displays the cost based on the location or the individual parts.
<b>Part Bin</b>	The part bin in the transaction.
<b>Part Brand</b>	The brand name for the part.
<b>Part Description</b>	The description for the part in the transaction.
<b>Part Number</b>	The number of the part in the transaction.
<b>Part Type</b>	The type of the part.
<b>Quantity</b>	The quantity of parts for the transaction.
<b>Record ID</b>	The Record ID in the transaction.
<b>Reservation</b>	This field is available only for the Issue transaction. Select the reservation that you want to apply from the drop-down list.
<b>Reservation Comments</b>	Comments on the reserve transaction to help verify that you selected the correct reserve transaction.
<b>Taxable</b>	Indicates whether or not the transaction is taxable.
<b>Transaction Cost</b>	The cost of the transaction.
<b>Transaction Date</b>	The date of the transaction.

<b>Transaction Type</b>	The transaction type: <b>Issue:</b> Parts taken out of stock and issued to a work order. <b>Receive:</b> Parts received from a shipment or a purchase order. <b>Transfer:</b> Parts transferred from one location to another. <b>Adjust:</b> Manually created transaction to update part information or adjust the quantity on hand. <b>Reserve:</b> Parts reserved for issue at a later date.
<b>Transfer to Location</b>	The location that the parts are to be transferred to for the transaction.
<b>Unit Cost</b>	The unit cost for the part in the transaction.
<b>Unit of Measurement</b>	The unit of measurement.
<b>Work Order ID</b>	The Work Order ID of the work order that requires the part.

## Part Supply Fields

The following table lists and defines the default fields on the Part Supply form.


Table 81: Part Supply Fields

<b>Comments</b>	Any comments associated with the location
<b>Location Name</b>	The name of the location of the supply.
<b>Part Bin 2</b>	The part bin number for the supply.
<b>Quantity on Hand</b>	The total quantity on hand for the location.
<b>Quantity on Hold</b>	The total quantity on hold for the location.
<b>Quantity on Order</b>	The total quantity that is on order for the location.
<b>Record Status</b>	The current status of the supply record.

## Work Order Parts Fields

The following table defines the default fields you may encounter when working with Work Order Parts.

Table 82: Work Order Parts Fields

<b>Calculate Type</b>	The type of calculation that you want Civic Platform to use when it calculates the average cost of the part. Options include <b>Simple Average</b> $((\text{current shipment cost} + \text{existing avg cost})/2)$ <b>Weighted Average</b> $((\text{current shipment cost} * \text{shipment quantity}) + (\text{existing avg cost} * \text{existing quantity})) / \text{total part quantity}$ <b>FIFO</b> (first in, first out) When you perform transactions, the oldest inventory is processed first. <b>LIFO</b> (last in, first out) When you perform transactions, the newest inventory is processed first.  <b>Note:</b> Both LIFO and FIFO track part costs across inventory locations. If you select FIFO or LIFO for a part, the Track Cost by Location option gets auto-selected, and you cannot freely change the unit cost of the parts that are already in stock.
<b>Comments</b>	Comments about the part.
<b>Maximum Quantity</b>	The maximum quantity of the part.
<b>Minimum Quantity</b>	The minimum quantity of the part (used to determine when to order parts).

<b>Original Part ID</b>	The vendor or manufacturer's original part number (optional).
<b>Part Brand</b>	The brand of the part.
<b>Part Description</b>	A description of the part.
<b>Part Number</b>	The number used to identify the part in the parts inventory list.
<b>Part Status</b>	The status of the part.
<b>Part Type</b>	The type of part. Example: Fittings, Fleet, Materials.
<b>Reorder Due</b>	If Yes, the total supply is greater than the minimum quantity. If No, the total supply is less than the minimum quantity.
<b>Reorder Quantity</b>	The quantity needed for the reorder.
<b>Taxable</b>	Indicates whether or not the part is taxable.
<b>Total Supply</b>	The total quantity on hand for a selected part displays in this field. This read-only field updates automatically based on part inventory
<b>Unit of Measure</b>	The unit of measure for the part. Example: Hours, Miles.
<b>Work Order Task</b>	The work order task associated with the work order when recording part usage. Civic Platform records part costs against work order tasks after they are complete, or after you associate them with a workflow task that is complete or currently active.

## Preventative Maintenance Schedules

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Choose a topic from the list below to learn more about working with preventative maintenance schedules.

### **Related Information**

[Preventative Maintenance Schedule Overview](#)

[Creating a PM Schedule](#)

[Searching for a PM Schedule](#)

[Updating PM Schedule Details](#)

[Deleting a PM Schedule](#)

[Holding PM Schedules](#)

[Linking Assets to PM Schedules](#)

[Skipping Assets on PM Schedules](#)

[Linking Addresses to PM Schedules](#)

[Generating Work Orders Using PM Schedules](#)

[Updating Work Order PM Schedules](#)

[Managing the PM Schedule Execution History](#)

[Tracking Last Maintenance Task](#)

[Examining PM Schedule Details](#)

## Preventative Maintenance Schedule Overview

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Civic Platform makes it easy to stay on top of preventative maintenance for any piece of equipment, asset, or vehicle. Preventative maintenance (PM) schedules are scheduled tasks that an agency requires for some assets to keep them in good working condition. Agencies can schedule preventative maintenance using both time and usage intervals.

USE CASE: An agency's fleet of trucks requires the performance of several different maintenance services at certain times so that the trucks remain in good working condition. For example, the agency requires an oil change every 3,000 miles or every 12 months, whichever comes first. The agency generates a PM schedule for the oil change and then generates a work order for each fleet vehicle every 3,000 miles or 12 months, whichever comes first. When the work is complete, the date for the next oil change sets automatically.

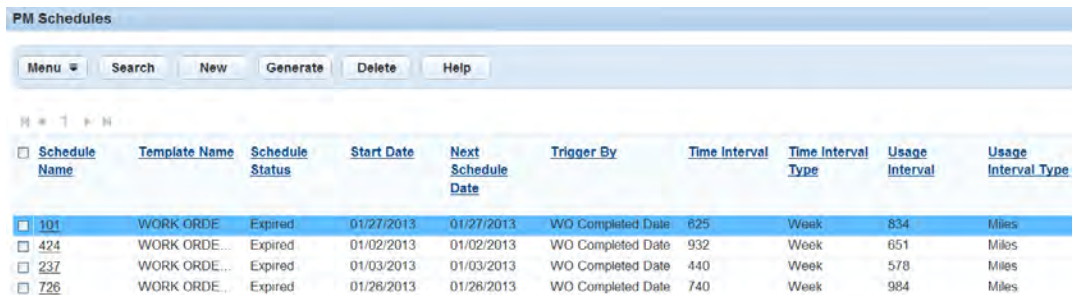


## Creating a PM Schedule

Preventative maintenance (PM) schedules are scheduled tasks that an agency requires for some assets to keep them in good working condition. Agencies can schedule preventative maintenance using both time and usage intervals.

### To create a PM schedule

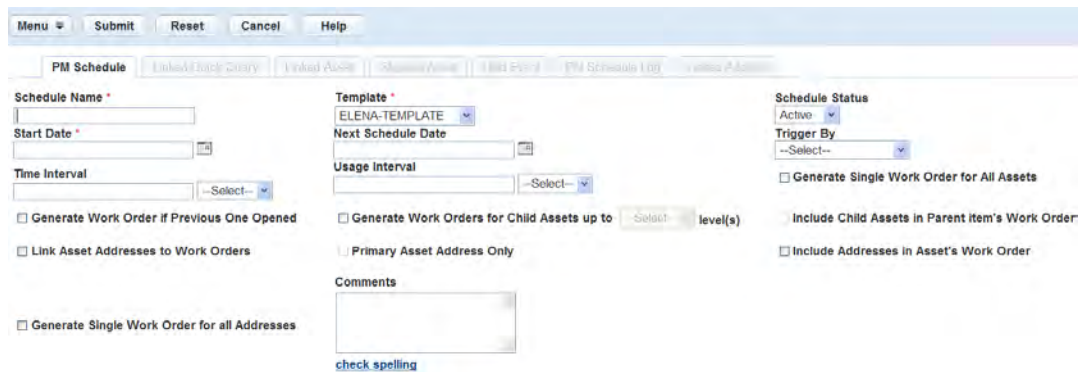
1. Navigate to the PM Schedule portlet.  
Civic Platform displays the PM schedule list portlet.



The screenshot shows the 'PM Schedules' portlet interface. At the top, there is a navigation bar with buttons for 'Menu', 'Search', 'New', 'Generate', 'Delete', and 'Help'. Below this is a table listing several PM schedules. The table has columns for 'Schedule Name', 'Template Name', 'Schedule Status', 'Start Date', 'Next Schedule Date', 'Trigger By', 'Time Interval', 'Time Interval Type', 'Usage Interval', and 'Usage Interval Type'. The first row is highlighted in blue and shows a schedule with ID 101, template 'WORK ORDE', status 'Expired', start date '01/27/2013', next schedule date '01/27/2013', trigger 'WO Completed Date', time interval '625', type 'Week', usage interval '834', and type 'Miles'.

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Trigger By	Time Interval	Time Interval Type	Usage Interval	Usage Interval Type
101	WORK ORDE	Expired	01/27/2013	01/27/2013	WO Completed Date	625	Week	834	Miles
424	WORK ORDE...	Expired	01/02/2013	01/02/2013	WO Completed Date	932	Week	651	Miles
237	WORK ORDE...	Expired	01/03/2013	01/03/2013	WO Completed Date	440	Week	578	Miles
726	WORK ORDE..	Expired	01/28/2013	01/28/2013	WO Completed Date	740	Week	984	Miles

2. Click **New**.  
Civic Platform displays the PM schedule form.



The screenshot shows the 'PM Schedule' form. It includes a navigation bar with 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below the navigation bar, there are several input fields and checkboxes. The 'Schedule Name' field is marked with a red asterisk. The 'Template' dropdown is set to 'ELENA-TEMPLATE'. The 'Next Schedule Date' field is marked with a red asterisk. The 'Usage Interval' dropdown is set to '--Select--'. The 'Time Interval' dropdown is set to '--Select--'. There are several checkboxes for generating work orders and including child assets. A 'Comments' text area is at the bottom, with a 'check spelling' link below it.

3. Complete the fields with available data, taking care to populate required fields (marked with a red asterisk). See [Preventative Maintenance Schedule Fields](#) for a list of fields and field definitions.
4. Click **Save**.  
Civic Platform creates the PM schedule and updates the PM schedule list.

## Searching for a PM Schedule

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### To search for a PM schedule

1. Navigate to the PM Schedule portlet.  
Civic Platform displays a list of all of the PM schedules.
2. Click **Search**.  
Civic Platform displays a search form.
3. Enter search criteria as needed to locate the PM schedule you are searching for.
4. Click **Submit**.  
Civic Platform returns a list of schedules matching your search parameters.

## Updating PM Schedule Details

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You can modify PM Schedule details as needed.

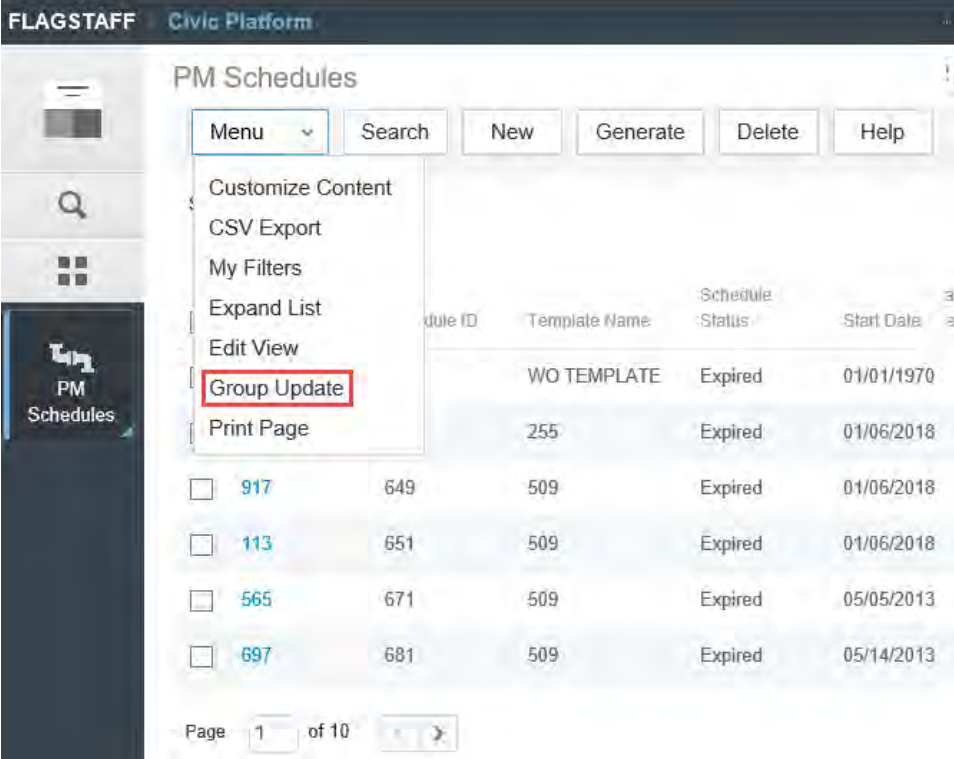
### To update a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate the schedule you want to update. See [Searching for a PM Schedule](#) for more information.  
Civic Platform displays a list of all of the PM schedules.
2. Click the Schedule Name link for the PM schedule you want to update.  
Civic Platform displays the PM schedule details.
3. Update data as needed. See [Preventative Maintenance Schedule Fields](#) for a list of fields and field definitions.
4. Click **Save**.  
Civic Platform saves your information and updates the PM schedule list with the new changes.

## Group Updates for Preventative Maintenance Schedules

You can edit or update multiple Preventative Maintenance Schedules at the same time if they all require the same change with the Group Update feature. For example, you can add the same Schedule Status to all the records using the Group Update function.

To use this feature FID 8600-PM Schedule Group Update must be enabled.



The screenshot shows the 'PM Schedules' interface in the FLAGSTAFF Civic Platform. A 'Menu' dropdown is open, with 'Group Update' highlighted in red. The table below displays a list of PM Schedules.

Schedule ID	Template Name	Schedule Status	Start Date	
WO TEMPLATE	Expired	01/01/1970		
255	Expired	01/06/2018		
<input type="checkbox"/> 917	649	509	Expired	01/06/2018
<input type="checkbox"/> 113	651	509	Expired	01/06/2018
<input type="checkbox"/> 565	671	509	Expired	05/05/2013
<input type="checkbox"/> 697	681	509	Expired	05/14/2013

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### To perform a group update on Preventative Maintenance Schedules

1. Navigate to **PM Schedules**.
2. Select a PM Schedule that contains the details you want to apply to other PM Schedules.
3. In the PM Schedule details area, update any details as appropriate and click **Save**.
4. Select multiple other PM Schedules that you want to update with the same details.
5. Go to **Menu > Group Update**.
6. Edit the PM Schedule with the new values.
7. Click **Save**.

## Deleting a PM Schedule

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When you delete a PM schedule, Civic Platform removes it from the schedule log. Work orders no longer generate.

### To delete a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate the schedules you want to delete. See [Searching for a PM Schedule](#) for more information.

Civic Platform returns a list of schedules matching your search parameters.

2. Click the Schedule Name link for the PM schedule you want to remove.

3. Click **Delete**.

Civic Platform displays a message indicating number of record(s) deleted.

## Holding PM Schedules

Civic Platform enables agencies to put a PM schedule task on hold as needed. For example, if a preventative maintenance task occurs seasonally, an agency can put a hold on that task for the time period when the maintenance task does not occur.

### To put a hold on a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform displays the PM schedule details.

2. Click the Hold Event tab.

Civic Platform displays the hold events for the selected PM schedule.

PM Schedule Name: 101

Menu ▾ New Delete Help

PM Schedule Linked Quick Query (0) Linked Asset (7) Skipped Asset (4) Hold Event (1) PM Schedule Log (0) Linked Address (6)

<input type="checkbox"/> Hold Event	Hold From	Hold To	Recurring	Status	Comments	Updated By	Updated Date	Record Status
<input type="checkbox"/> SEQ 217	01/22/2013	01/23/2013	Every Year	Expired	796	ADMIN	12/25/2012	Active

3. Click **New**.

Civic Platform displays the details for the hold event.

PM Schedule Name: 101

Menu ▾ Submit Reset Cancel Help

PM Schedule Linked Quick Query Linked Asset Skipped Asset **Hold Event** PM Schedule Log Linked Address

Hold From \*

Hold To \*

Recurring \* One Time ▾

Status \* Active ▾

Comments

[check spelling](#)

4. Enter the Hold From and Hold To dates to indicate when the PM schedule should not execute.
5. Select an option from the Recurring drop-down list to indicate if this event is a one time event or an annual event.

6. Click **Submit**.

Civic Platform creates the hold event and then updates the list of hold events for the PM schedule.

## Linking Assets to PM Schedules

You must link an asset to a PM schedule if you want to apply the preventative maintenance requirements to that asset. Civic Platform then generates a work order to perform the maintenance task for the asset.

The following topics describe different approaches you can take to link assets to PM schedules.

- [Executing a Linked Asset Query](#)
- [Adding Linked Assets to PM Schedules](#)

### Executing a Linked Asset Query

Linked asset query provides two query types, quick query and spatial query, for you to quickly link existing assets to a PM schedule.

#### To execute a linked asset query

1. Navigate to the PM Schedules portlet and use Search to locate the schedule you want to work with. Civic Platform displays the PM schedule details.
2. Click the Linked Asset Query tab. Civic Platform displays the Linked Asset Query tab.

PM Schedule Name: RO WO - Route #1

Menu Save Reset Execute Help Query Type Quick Query

PM Schedule Linked Asset Query Linked Asset (0) Skipped Asset (0) Hold Event (0)

Quick Query  
--Select--

Query Results  
 Appended to Existing Linked Assets  
 Replace Existing Linked Assets

Comments

[check spelling](#)

3. Select a query type from the Query Type drop-down list. Civic Platform refreshes the linked asset query tab to display the details of the selected query.
  - If you select Quick Query as the query type, you can execute a predefined quick query for assets.
  - If you select Spatial Query as the query type, you can specify a GIS object on the Accela GIS map, and perform a spatial search around the GIS object for assets.
4. To select a quick query after you choose the Quick Query type:
  - a. Select a quick query from the Quick Query drop-down list. The options are the global quick queries that your agency administrator configured for Asset Data List, that is, the assets list portlet.
  - b. Update these fields as needed:

**Query Results**

Select a method to add the query results to the linked assets list:

**Appended to Existing Linked Assets** - Select this option if you want to append the query results to the existing linked assets list.

**Replace Existing Linked Assets** - Select this option if you want to replace the existing linked assets with the query results.

**Note:**

If you configure both quick query and spacial query, only one query type can select the option “Replace Existing Linked Assets.”

**Comments**

Enter some comments relating to the selected quick query.

5. To configure a spatial query after you choose the Spatial Query type:

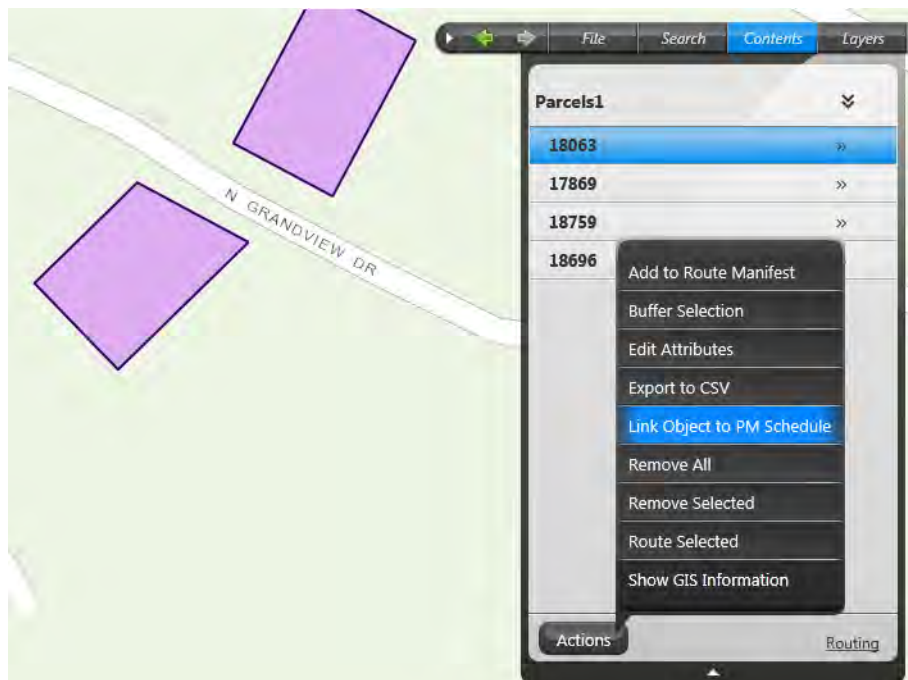
a. Click the **GIS** button.

Civic Platform displays the Accela GIS map viewer.

b. Use the selection tool to select objects on the map, and then select only one object on the Contents panel to be the object around which you want to perform a spatial search for assets.

Accela GIS highlights the object in blue on the Contents panel.

c. Click the **Actions** button on the Contents panel, and select the **Link Object to PM Schedule** command.





The Accela GIS map viewer closes. The information about the selected GIS object populates in the GIS Layer, GIS Service, and GIS ID fields.

d. Specify the criteria that the spatial query uses to look for assets.

**Asset Group**

Specify the asset group. The spatial query only looks for the assets that belong to the asset group.



<b>Asset Type</b>	Specify the asset type. The spatial query only looks for the assets that belong to the asset type.   <b>Note:</b> If this field is null, the spatial query looks for assets by the asset types that support the record type associated with the work order template used for the PM schedule.
<b>Buffer Distance</b>	Specify the buffer distance for determining the buffer area around the specified GIS object. The spatial query only looks for the assets that fall within the buffer area.
<b>Buffer Unit</b>	Specify the unit used for the buffer distance.
<b>GIS Layer</b>	Read-only field. Shows the GIS layer of the specified GIS object.
<b>GIS Service</b>	Read-only field. Shows the GIS service that provides the specified GIS object.
<b>GIS ID</b>	Read-only field. Shows the GIS ID of the specified GIS object.
<b>Query Results</b>	Select a method to add the query results to the linked assets list: <b>Appended to Existing Linked Assets</b> Select this option if you want to append the query results to the existing linked assets list. <b>Replace Existing Linked Assets</b> Select this option if you want to replace the existing linked assets with the query results.   <b>Note:</b> If you configure both quick query and spacial query, only one query type can select the option "Replace Existing Linked Assets."
<b>Status</b>	The status of the spatial query criteria. You can set it to active or inactive.

6. Click **Save** to save the quick query or spatial to the PM schedule.

You can also click **Reset** to clean up the changes you made in the previous step.

7. Click the **Execute** button to add the query results to linked assets.

Civic Platform adds the queried assets to linked assets according to the selected [Query Results](#) option.



**Note:**

If you generate work orders for the PM schedule without first executing the query, Civic Platform still generates work orders against the assets meeting the selected quick query criteria, and the assets meeting the configured spatial query criteria.

- If the query result option of the quick query or spatial query is "Appended to Existing Linked Assets," Civic Platform does not append the query results to the list of linked assets.
  - If the query result option of the quick query or spatial query is "Replace Existing Linked Assets," Civic Platform replaces the existing linked assets with the query result.
- 

## Adding Linked Assets to PM Schedules

You can directly look up and add one or more assets to a PM schedule.

### To add a linked asset to a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform displays the PM schedule details on the record tabs.

2. Click the Linked Assets tab.

Civic Platform displays the assets associated with the selected PM schedule.

PM Schedule Name: 101

Menu Save Look Up GIS Delete Help

PM Schedule Linked Quick Query (0) Linked Asset (7) Skipped Asset (4) Hold Event (1) PM Schedule Log (0) Linked Address (6)

Asset ID	Asset Name	Order	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
<input type="checkbox"/> 405	elena	<input type="text" value="1"/>		sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/> 314-1	115	<input type="text" value="2"/>		sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/> 20121225		<input type="text" value="3"/>		sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/> 379	616	<input type="text" value="4"/>		sail group 1	Test	Point				12/25/2012
<input type="checkbox"/> 881-1	896	<input type="text" value="5"/>		sail group 1	Test	Point				12/26/2012
<input type="checkbox"/> 507-1	616	<input type="text" value="6"/>		sail group 1	Test	Point				12/27/2012
<input type="checkbox"/> 10086-1	10086-1	<input type="text" value="7"/>		sail group 1	Test	Point			Active	01/10/2013

**3. Click Look Up.**

Civic Platform displays the detail fields that apply to the asset.

**4. Complete the fields that apply to the asset that you are searching for.**

**5. Click Submit.**

Civic Platform displays the assets that match your search parameters.

**6. Select the asset(s) you want to link to the PM schedule.**

**7. Click Select.**

Civic Platform links the selected assets to the PM schedule and displays the updated s list portlet.

## Skipping Assets on PM Schedules

Agencies can identify asset exceptions (skipped assets) when they link assets to a PM schedule. For example, when an agency creates an oil change PM schedule, the agency can configure the schedule to include all fleet trucks except for those trucks that are out of commission. When the maintenance schedule triggers, an oil change work order generates for all trucks in the fleet except for those trucks identified as skipped assets.

### To skip an asset when a PM schedule executes

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform displays the PM schedule details.

2. Click the Skipped Asset tab.

Civic Platform displays the assets that are skipped with the executing a PM schedule.

PM Schedule Name: 101

Menu Look Up GIS Delete Help

PM Schedule Linked Quick Query (0) Linked Asset (7) Skipped Asset (4) Hold Event (1) PM Schedule Log (0) Linked Address (6)

<input type="checkbox"/>	Asset ID	Asset Name	Icon	Asset Group	Asset Type	Class Type	Asset Size	Size Unit	Status	Status Date
<input type="checkbox"/>	405	elena		sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/>	314-1	115		sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/>	20121225			sail group 1	Test	Point			Active	01/30/2013
<input type="checkbox"/>	379	616		sail group 1	Test	Point				12/25/2012

3. Click **Lookup**.

Civic Platform displays a search form.

4. Enter search criteria as needed to locate the asset you are searching for.

5. Click **Submit**.

Civic Platform displays the assets that match your search parameters.

6. Select the assets you want to skip.

7. Click **Select**.

Civic Platform displays the updated skipped asset list portlet.

## Linking Addresses to PM Schedules

You can link a PM schedule to one or more street addresses as needed. For example, you can create a PM schedule for a series of property inspections, linking the schedule to a group of property addresses rather than to a group of assets.

### To link an address to a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform displays the PM schedule details on the record tabs.

2. Click the Linked Address tab.

Civic Platform displays the addresses associated with the selected PM schedule.

PM Schedule Name: 101

Menu Look Up Search and Select Delete Help

PM Schedule Linked Quick Query (0) Linked Asset (7) Skipped Asset (4) Hold Event (1) PM Schedule Log (0) Linked Address (6)

<input type="checkbox"/>	Street #	Start Fraction	Direction	Street Name	Street Type	Unit #	City	State	Zip Code	Primary	Audit Status
<input type="checkbox"/>	1			CLAUSS	CT	17D	SACRAMENTO	CA	95820	Yes	Enabled
<input type="checkbox"/>	1			CLAUSS	CT	17C	SACRAMENTO	CA	95820	Yes	Enabled
<input type="checkbox"/>	1			CLAUSS	CT	17B	SACRAMENTO	CA	95820	Yes	Enabled
<input type="checkbox"/>	1			CLAUSS	CT	17A	SACRAMENTO	CA	95820	Yes	Enabled
<input type="checkbox"/>	1			CLAUSS	CT	16D	SACRAMENTO	CA	95820	Yes	Enabled
<input type="checkbox"/>	1			CLAUSS	CT	16C	SACRAMENTO	CA	95820	Yes	Enabled

3. Click **Lookup**.

Civic Platform displays a search form.

4. Enter search criteria as needed to locate the address you are searching for.

5. Click **Submit**.

Civic Platform displays the addresses matching your search parameters.

6. Select the addresses that you want to link to the PM schedule.

7. Click **Select**.

Civic Platform links the selected addresses to the PM schedule and displays the updated linked address list portlet.

# Generating Work Orders Using PM Schedules

Civic Platform generates work orders for each linked asset each time a preventative maintenance task queues. For example, an agency requires an oil change every 3,000 miles for its fleet of vehicles. The agency generates a PM schedule for the oil change and they link the applicable vehicles to the PM schedule. When one or more of the vehicles hits or exceeds the 3,000 mile milestone, an agency user can generate a batch of work orders for each vehicle that achieved the milestone. When the work orders are complete, the next PM schedule date schedules automatically.

## To generate work orders from a PM schedule

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform returns a list of all schedules that match your search parameters.

2. Select the PM schedule that you want to generate work orders from.

3. Click **Generate**.

Civic Platform displays the generate PM schedule date portlet.

The screenshot shows a portlet titled "PM Schedules". It contains a menu dropdown, buttons for "Preview", "Generate", "Reset", "Cancel", and "Help". Below these are two input fields: "Through Date\*" with the value "02/13/2013" and a calendar icon, and "Schedules To Generate\*" with two radio button options: "All PM Schedules in the list" (selected) and "Selected PM Schedules only".

4. Enter the Through Date.

5. Select the **Schedules to Generate** option to generate work orders either for all PM schedules in the list or for selected PM Schedules only. If you do not select any PM Schedules, only the first option is available.

6. Click **Preview**.

Civic Platform displays the generate PM schedule preview report.

See [Summary Fields in the Preview Summary Report](#) for descriptions of the fields that appear on this report.

The screenshot shows a "PM Schedule Preview Report" with a summary section and a detailed table. The summary section includes: Batch ID: 10359, Processed By Department: CDD-Administration, Processed By Staff: Admin User, Processed Date: 02/13/2013, and Operation Type: PRE\_PROCESS.

Schedule Name	Work Orders	Linked Assets	Skipped Assets (User Setting)	Skipped Assets (Open Previous Work Order)	Skipped Assets (Hold Events)	Skipped Assets (Not due to Generate Work Orders)	Total Skipped Assets	Linked Addresses	Skipped Addresses (Open Previous Work Order)	Skipped Addresses (Hold Events)	Skipped Addresses (Not due to Generate Work Orders)	Total Sk Address
101	1	7	4	0	0	0	4	7	0	0	0	0

Schedule Name	Template Name	Start Date	Next Schedule Date	Trigger By	Time Interval	Usage Interval	Generate Single Work Order for All Assets	Generate Work Order if Previous for Child Asset(s) Opened	Generate Work Order to level in Parent Item's Work Order	Up to Child Assets in Orders	Include Asset to Work Orders	Link Asset to Work Orders	Primary Asset Only	Include Asset's Work Order	Generate Single Work Order for all Addresses	Com
101	WORK ORDER TEST	01/27/2013	01/27/2013	WO Completed Date	625 Week	834 Miles	Y	Y	Y	2	N	Y	Y	Y	N	262

7. Review the report to verify that the PM schedules listed are correct.

8. Click **Generate**.

Civic Platform displays a message asking if you are sure you want to generate the work orders from the selected PM schedule.

**9. Click OK**

Civic Platform displays the generate PM schedule summary report.

The screenshot shows a web application window titled 'PM Schedules'. It displays a 'PM Schedule Summary Report' for a schedule named 'WORK ORDER TEST'. The report includes a summary table and a detailed table of schedule parameters.

**Summary Table:**

Schedule Name	Work Orders	Linked Assets	Skipped Assets (Last Session)	Skipped Assets (Down Previous Work Order)	Skipped Assets (Hold Events)	Skipped Assets (Not due to Generate Work Order)	Total Skipped Assets	Linked Addresses	Skipped Addresses (Open Previous Work Order)	Skipped Addresses (Hold Events)	Skipped Addresses (Not Due to Generate Work Order)	Total Skipped Addresses
101	0	7	4	0	0	3	7	6	0	0	6	6

**Processed PM Schedule Table:**

Schedule Name	Template Name	Start Date	Next Schedule Date	Trigger By	Time Interval	Usage Interval	Generate Single Work Order for All Assets	Generate Work Order if Previous One Succeeds	Generate Work Orders for Child Assets	Up to Next (N)	Include Child Assets in Parent Item's Work Order	Link Asset Addresses to Work Orders	Primary Asset Address Only	Include Addresses in Asset's Work Order	Generate Single Work Order for all addresses	Comments
101	WORK ORDER TEST	01/27/2013		WO Completed Date	625 Weeks	624 Weeks	Y	Y	Y	2	N	Y	Y	Y	N	262

**10. Click Complete.**

Civic Platform generates the work orders from the selected PM schedule(s) and returns to the PM schedules list portlet.

## Updating Work Order PM Schedules

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Some users can modify maintenance schedule details from the Work Order portlet, depending on individual user privileges (see your agency administrator for information about your user privileges).

### To update a work order PM schedule

1. Navigate to the Work Order portlet and use search to locate the work order you want to work with. See [Using the Search Features](#) for information about performing searches.  
Civic Platform returns a list of all work orders that match your search parameters.
2. Click the Work Order ID to open the work order record that you want to update.  
Civic Platform displays the work order details on the record tabs.
3. Click the PM Schedule tab.  
Civic Platform displays the details of the PM schedule for the selected work order.
4. Based on your user privileges, you may or may not be able to edit the maintenance schedule details. If the fields are editable, update any of the fields that apply.  
For a description of the fields, see [Preventative Maintenance Schedule Fields](#).  
If the work order does not reference a PM schedule, Civic Platform displays the following message:  
“The Work Order hasn’t been referred by PM Schedules.”
5. If you modified any fields, click **Submit**.  
Civic Platform updates the work order with the PM Schedule information.

# Managing the PM Schedule Execution History

An “execution event” occurs when you use a PM schedule to generate work orders. When an event executes, Civic Platform tracks the data associated with the event, including attached work orders and assets, for historical purposes. You can view a log of execution events the PM Schedule Log portlet. You can also generate a report of execution events from the PM Schedule Log portlet using My Quick Queries. For more information on how to use QuickQueries see [Understanding QuickQueries](#) .

## To view the PM Schedule History Log

1. Navigate to the PM Schedule portlet and use Search to locate and open the schedule you want to work with. See [Searching for a PM Schedule](#) for more information.

Civic Platform returns a list of all schedules that match your search parameters.

2. Select the PM schedule that you want to review the history for.

Civic Platform displays the PM Schedule details.

3. Click the PM Schedule Log tab.

Civic Platform displays the history of all of the schedules executed for the selected PM Schedule.

Log ID	Batch ID	WO ID	Asset ID	Asset Group	Asset Type	Operation Type	Process Type	Processed By Department	Processed By Staff	Processed Date	Record Status	Updated Date
156274	10360		405	sail group 1	Test	GENERATION	Skipped(User Setting)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156275	10360		314-1	sail group 1	Test	GENERATION	Skipped(User Setting)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156276	10360		20121225	sail group 1	Test	GENERATION	Skipped(User Setting)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156277	10360		379	sail group 1	Test	GENERATION	Skipped(User Setting)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156278	10360	13CAP-000	861-1	sail group 1	Test	GENERATION	Generated(Time-based)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156279	10360	13CAP-000	507-1	sail group 1	Test	GENERATION	Generated(Time-based)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013
156280	10360	13CAP-000	10086-1	sail group 1	Test	GENERATION	Generated(Time-based)	CDD-Admin...	Admin User	02/13/2013	Active	02/13/2013

4. Click **Search**.

Civic Platform displays the detail fields for the PM Schedule history log.



5. Enter search criteria as needed to locate the PM schedule history you are searching for.

6. Click **Submit**.

Civic Platform displays the history of all of the schedules executed for the selected PM schedule that match the search parameters entered.

# Tracking Last Maintenance Task

You can view the maintenance tasks scheduled for a specific asset as needed. For example, you might need to find out when the last maintenance task occurred for an asset,

### To view PM schedules for an asset

1. Navigate to the Assets portlet. Use Search to locate the asset you want to work with. See [Using the Search Features](#) for information about conducting a search. Civic Platform displays a list of all of the assets.
2. Click the Asset ID for the asset you want to update. Civic Platform displays the asset details on the record tabs.

Asset ID: 405

Menu ▾ Save Reset Recalculate Value Clone Help

Asset Detail Address (10) Work Order (0) Linked Assets Attachments (0) PM Schedules (2)

Asset Name: elena Asset ID: 405 Asset Type: Test

Asset Group: sail group 1 Class Type: Point

Current Value: 0.0300 Date of Service: 01/23/2013 Depreciation Amount: 199.9700 Depreciation Value: 0.0300 Description: elena

Status: ACTIVE Record Status: Active Useful Life (Years): 2.00

Comments: 855 Cost LTD: 0.0000 Salvage Value: 0.0300 Status Date: 01/30/2013

Start Value: 200.0000 Parent Asset ID:

Dependent Parent

Depreciation Start Date: 01/23/2010 Depreciation End Date: 01/23/2014

3. Click the PM Schedule tab.

Civic Platform displays a list of PM Schedules for the selected asset including the last maintenance task.

Asset ID: 405

Menu ▾ Help

Asset Detail Address (10) Work Order (0) Linked Assets Attachments (0) PM Schedules (2) Condition (60) Condition Assessment (0) Ratings (0) Associated Parts (4) Contact (12)

Schedule Name	Template Name	Schedule Status	Start Date	Next Schedule Date	Tripper By	Time Interval	Time Interval Type	Generate Single Work Order for All Assets	Generate Work Order if Previous One Opened	Generate Work Orders for Child Assets	Up to level (1)	Include Child Assets in Parent Item's Work Order	Link Asset Addresses to Work Orders	Primary Asset Address Only	Include Addresses in Asset's Work Order
237	WORK ORDE	Expired	01/03/2013	01/03/2013	WO Completed Date	440	Week	Y	Y	Y	2	N	Y	Y	Y
101	WORK ORDE	Active	01/27/2013		WO Completed Date	625	Week	Y	Y	Y	2	N	Y	Y	Y

## Examining PM Schedule Details

The following tables list and define the default fields you may encounter when working with Preventative Maintenance Schedules.

### Topics

- [Preventative Maintenance Schedule Fields](#)
- [Summary Fields in the Preview Summary Report](#)

### Preventative Maintenance Schedule Fields

The table below lists and defines the default fields available when working with PM schedules.

Table 83: Preventative Maintenance Schedule Fields

<b>Comments</b>	Enter any comments associated with the maintenance schedule.
<b>Generate Single Work Order for All Addresses</b>	Select this option to create a work order for each asset address linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all addresses. This box is not active if the Include Addresses in Asset's Work Order option is enabled.
<b>Generate Single Work Order for All Assets</b>	Select this option to create a work order for each asset linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all assets.
<b>Generate Work Orders for Child Assets up to n level(s)</b>	Select this option to create work orders for s and their child assets up to three levels.
<b>Generate Work Order if Previous One Opened</b>	Select this option to allow the PM schedule to create a work order for an asset that has a previous work order still open.
<b>Include Addresses in Asset's Work Order</b>	Select this option to include the addresses linked to the preventative maintenance schedule in asset work orders created by the schedule.
<b>Include Child Assets in Parent item's Work Order</b>	This option activates when the Generate Work Orders for Child Assets up to n level(s) box is checked. Select this option to create one work order for a parent asset and its child assets. Otherwise, each child asset receives its own work order.
<b>Link Asset Addresses to Work Orders</b>	Select this option to show an asset's addresses in work orders created for that asset.
<b>Log ID</b>	Enter the Log ID number associated with the maintenance schedule. If enabled, you may enter a range when searching where the desired Log ID number is between the upper (From) and lower (To) values.
<b>Next Schedule Date</b>	The next date when the PM Schedule generates a new work order. The field value relies on the option that you select in the Trigger By drop-down list. If the Trigger By option is Scheduled Date, you enter the date manually in the field.  If the Trigger By option is WO Completed Date, this field is read-only. The Next Schedule Date is the completion date of the previous work order plus the Time Interval configured in the PM schedule.  If the Trigger By option is WO Closed Date, this field is read-only. The Next Schedule Date is the closed date of the previous work order plus the Time Interval configured in the PM schedule.
<b>Primary Only</b>	This option activates when the Link Asset Addresses to Work Orders box is checked. Select this option to show only an asset's primary address in work orders created by this PM schedule.
<b>Record Status</b>	Indicates the status of the record.

<b>Schedule ID</b>	This read-only field displays the auto-generated sequence number of the PM schedule.
<b>Schedule Name</b>	Enter a unique name for the schedule.
<b>Schedule Status</b>	Indicates the status of the scheduled maintenance. Example: Active or Expired. The status controls whether or not the maintenance schedule executes a work order or not. If the status is active, the work order generates. Civic Platform does not execute a work order after the expiration date.
<b>Start Date</b>	The start date for the PM schedule. When you create a new PM schedule, the start date indicates the date when the PM schedule becomes available to run.
<b>Template</b>	The name of work order template used for the schedule.
<b>Time Interval</b>	The number of days/weeks/months/years between work orders generated for scheduled maintenance tasks. If enabled, you may enter a range when searching where the desired time interval is between the upper (From) and lower (To) values.
<b>Trigger By</b>	Indicates when the next PM schedule should begin. There are three available values in this drop-down list: <b>Scheduled Date:</b> If you want Civic Platform to generate work orders on a fixed schedule, select this value. When you select this value, Civic Platform generates work orders regardless of the previous work order status. <b>WO Completed Date:</b> Select this value if you want the next PM schedule to begin based on the completion of the prior work order. <b>WO Closed Date:</b> Select this value if you want the next PM schedule to begin based on the closing date of the prior work order.
<b>Usage Interval</b>	The usage interval value and then select the unit type in the drop-down list.

## Summary Fields in the Preview Summary Report

The table shown below lists and defines the summary fields that display on the “PM Schedule Preview Summary” report.

Table 84: Summary Fields in PM Schedule Preview/Summary Report

<b>Schedule Name</b>	The PM schedule name.
<b>Work Orders</b>	The number of work orders generated successfully from the PM schedule.
<b>Linked Assets</b>	The number of assets in the s tab of the PM schedule.
<b>Skipped Assets (User Setting)</b>	The number of assets in the Skipped Assets tab of the PM schedule. Civic Platform does not generate work orders for these assets.
<b>Skipped Assets (Open Previous Work Order)</b>	If you clear the Generate Work Order if Previous One Opened option for the PM schedule, this field counts the assets for which generated work orders exist for the PM schedule. Civic Platform does not generate work orders for these assets.
<b>Skipped Assets (Hold Event)</b>	The number of linked assets that the PM schedule should not execute based on existing hold events in the Hold Event tab.
<b>Skipped Assets (Not due to Generate Work Order)</b>	If the Through Date of the PM schedule that you specify in <a href="#">Enter the Through Date</a> is earlier than the Next Schedule Date, Asset Management does not generate work orders from the PM schedule. This field counts the number of all the linked assets. Otherwise, this field counts the number of assets with active lock condition, and the assets with details conflicting with the PM schedule details (such as Usage Interval).
<b>Total Skipped Assets</b>	This field is the sum of all the skipped assets.
<b>Linked Addresses</b>	This field counts the number of addresses in the Linked Addresses tab of the PM schedule.

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<b>Skipped Addresses (Open Previous Work Order)</b>	If you clear the Generate Work Order if Previous One Opened option for the PM schedule, this field displays the number of linked addresses for which work order currently exist. Civic Platform does not generate work orders for these addresses.
<b>Skipped Addresses (Not due to Generate Work Order)</b>	This field displays the number of linked addresses. If the Through Date of the PM schedule that you specify in <a href="#">Enter the Through Date</a> . is earlier than the Next Schedule Date, Asset Management does not generate work orders from the PM schedule.
<b>Total Skipped Addresses</b>	This field is the sum of all the skipped addresses.

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# Addresses

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Choose a topic from the list below to learn more about working with addresses.

## **Related Information**

[Addresses Overview](#)

[Managing Reference Addresses](#)

[Locating an Address Using Accela GIS](#)

[Managing Associated Work Orders and Assets](#)

[Managing Address Contacts](#)

[Associating an Address with a Public User](#)

[Viewing PM Schedules for an Address](#)

[Working with External Addresses](#)

[Examining Address Details](#)

## Addresses Overview

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Use the address functions in Civic Platform to keep track of the addresses and owners related to an asset or work order. Addresses added to Civic Platform are stored in a central database referred to as a reference database.

A reference database acts as a library that allows users to search for certain types of stored information. For example, you may need to search for an existing address when creating a new work order or asset. Reference data saves you time by storing standardized records that you can search for and easily associate with a work order or asset.

Depending on your privileges, you may be able to create a new reference addresses as well as modify existing address records from the reference database. Once you add a reference address, you cannot delete it. You can, however, disable it and prevent users from associating the address with new work orders or assets.

## Managing Reference Addresses

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A reference database acts like a library that allows users to search for certain types of stored information. For example, you may need to search for an existing address when creating a new work order or asset. Reference data saves you time by storing standardized records that you can search for and easily associate with a work order or asset. This section explains how to work with reference address records. Depending on your privileges, you may be able to create new reference addresses as well as modify or copy existing address records from your reference database. Once you add a reference address, you cannot delete it. You can, however, disable it and prevent users from associating the address with new a work order or asset. This change will not affect any work order or asset currently associated with the reference address.

### Topics

- [Adding a Reference Address](#)
- [Searching for a Reference Address](#)
- [Copying a Reference Address](#)
- [Editing a Reference Address](#)

### Adding a Reference Address

Reference addresses can be added to your database and associated with a work order or asset. Once a reference address is added, it will be available for lookup when associating with a specific work order or asset.

#### To add a reference address

1. Go to the Addresses portlet.  
Civic Platform displays a list of reference addresses.
2. Click **New**.  
Civic Platform displays the address details.
3. Complete any of the fields that display. See [Address Fields](#).
4. As needed, import address details from an external permitting system.
5. Click **Submit**.

### Searching for a Reference Address

After an address is added to the reference database, a search can be used to find the address and view the address details as well as any work order or asset with which it is currently associated.

#### To search for a reference address

1. Go to the Addresses portlet.  
Civic Platform displays the address search intake form.
2. Enter search criteria as needed to locate the desired address.

**Note:**

According to your agency's settings and the form layout, there may be template fields in addition to the standard fields in [Address Fields](#). The additional fields are active attributes defined in the address template in Civic Platform.

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**3. Click **Submit**.**

Civic Platform displays the search results.

**4. To view a list of work orders or assets associated with the address, click the Record Detail tab.**

Civic Platform displays a list of work orders and assets associated with the address.

## Copying a Reference Address

You can create a new address record by copying the address information from an existing address and modifying it. This is particularly useful if you need to enter numerous addresses in a development area where there is minimal changes, such as the house numbers to town homes all on the same street.

### To edit a reference address

**1. Go to the Addresses portlet.**

Civic Platform displays a list of reference addresses.

**2. Select the address you want to copy. If you do not see the address you are looking for, search for following the steps described in [Searching for a Reference Address](#).**

**3. Click **Copy**.**

Civic Platform automatically populates address fields in the address detail area with the address information from the original address.

**4. Modify field data if needed. See [Address Fields](#) for field definitions.**

**5. Click **Submit**.**

Civic Platform updates the address.

## Editing a Reference Address

Reference address details can be edited as necessary. The changes will not affect any work order or asset currently associated with the address. They will, however, affect all new work orders or assets that are created and associated with the address.

### To edit a reference address

**1. Navigate to the Addresses portlet.**

Civic Platform displays a list of reference addresses.

**2. Use Search to locate the reference address you want to update, then click the link for the address you want to edit. See [Searching for a Reference Address](#) for more information.**

Civic Platform displays the address details.

**3. Update field data as needed. See [Address Fields](#) for field definitions.**

**4. Click **Submit**.**

Civic Platform updates the address.

## Locating an Address Using Accela GIS

---

Addresses can be located using Accela GIS. Accela GIS is an interface that works in conjunction with Civic Platform to provide automated maps from a central database and give staff direct access to view geographic representations of all land-use, zoning, and infrastructure information associated with a parcel, permit, inspection, or plan.

If your agency uses Accela GIS, you can use the map viewer to locate an address and any related applications. See the Accela GIS User Guide for more information about using Accela GIS.

### **To locate work orders or assets with Accela GIS**

1. Navigate to the Work Orders or Assets portlet and click the link to the work order or asset ID you want.  
If you do not see the work order or asset you are looking for, use Search to locate the record. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the work order or asset details.
2. Click the Addresses tab.  
Civic Platform displays a list of addresses associated with the work order or asset.
3. Select the addresses you want to view on the map.
4. From the drop-down next to the GIS button, select the map service you want to use.
5. Click the GIS toolbar buttons to locate an address, locate the latitude and longitude, save a Location, center the map, and zoom in or out.  
Civic Platform displays the selected addresses as red dots on the Accela GIS map.

## Managing Associated Work Orders and Assets

---

Addresses can be added to a work order or asset. Each work order or asset may have one or more addresses associated with it and will be used to identify locations such as, work order jobs, fire hydrant, and building locations.

### Topics

- [Adding an Address from Your Reference Database](#)
- [Adding a New Address to a Work Order or Asset](#)
- [Viewing Associated Work Orders and Assets](#)
- [Editing an Address in a Work Order or Asset](#)
- [Removing an Address from a Work Order or Asset](#)

### Adding an Address from Your Reference Database

Addresses can be added to work orders or assets using the address reference database. Addresses that have been added to the reference database can be found and then associated with work orders or assets from the address lookup portlet. One or more addresses can be selected from this portlet and automatically associated with the work order or asset.

#### To add an address from your reference database

1. Navigate to the Work Orders or Assets portlet and click the link to the work order or asset ID you want.  
If you do not see the work order or asset you are looking for, use Search to locate the record. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the work order or asset details.
2. Click the Addresses tab.
3. Click **Look Up** to locate a reference address.
4. Enter search criteria as needed to locate the address you want.
5. Click **Submit**.  
Civic Platform displays your search results.
6. Select the addresses you want to add.
7. Click **Select**.
8. Click **Submit**.  
Civic Platform adds the address to the work order or asset.

### Adding a New Address to a Work Order or Asset

Addresses can be added to a work order or asset that are not located in the in reference database. There may be one or more addresses associated with each work order or asset that can be entered manually through the work order or asset.

Civic Platform does not store new addresses that you add from these areas in the reference database.

#### To add an address to a work order or asset

1. Navigate to the Work Orders or Assets portlet and click the link to the work order or asset ID you want.

If you do not see the work order or asset you are looking for, use Search to locate the record. See [Using the Search Features](#) for information about using Search.

Civic Platform displays the work order or asset details.

2. Click the Addresses tab.
3. Click **New**.
4. Complete any of the fields that display.  
For descriptions of common fields, see [Address Fields](#).
5. Click **Submit**.  
Civic Platform adds the address to the work order or asset.

## Viewing Associated Work Orders and Assets

Reference addresses associated with a work order or asset can be viewed from the addresses portlet. The same address may be used for various work orders or assets and will be displayed under the appropriate tabs. The details of the work order or asset can be viewed by selecting the ID to the work order or asset from the applicable list.

### To view work orders or assets associated with a reference address

1. Go to the Addresses portlet.  
Civic Platform displays a list of reference addresses.
2. Click the link to the address you want.  
If you do not see the address you are looking for, you may need to search for it.  
Civic Platform displays the address details.
3. Click the Work Orders or Assets tab.  
Civic Platform displays a list of work orders or assets associated with the address.
4. To view or update work order or asset details, click the link to the work order or asset that you want to view.  
Civic Platform displays the details of the selected work orders or assets associated with the address.

## Editing an Address in a Work Order or Asset

After an address is added to a work order or asset, it can be edited as needed to correct mistakes or complete partial information. Editing an address for a work order or asset does not change the details about the address in your reference database nor does it affect any other work order or asset with the same address. The changes affect only the work order or asset that you are currently working on.

### To edit an address for a work order or asset

1. Navigate to the Work Orders or Assets portlet and click the link to the work order or asset ID you want.  
If you do not see the work order or asset you are looking for, use Search to locate the record. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the work order or asset details.
2. In the Number column, click the link to the address that you want to edit.  
Civic Platform displays the details.
3. Edit any of the fields that display. For a description of the fields, see [Address Fields](#).
4. Click **Submit** to save your changes.

Civic Platform saves the changes to the address.

## Removing an Address from a Work Order or Asset

If an address is no longer relevant to the item or is no longer associated, it can be removed. Deleting an address from a work order or asset does not delete the address from the reference database or affect other work order or asset associated with the same address, it only removes the association between the address and work order or asset.

### To delete an address from a work order or asset

1. Navigate to the Work Orders or Assets portlet and click the link to the work order or asset ID you want.  
If you do not see the work order or asset you are looking for, use Search to locate the record. See [Using the Search Features](#) for information about using Search.  
Civic Platform displays the work order or asset details.
2. Click the Addresses tab.  
Civic Platform displays a list of addresses associated with the work order or asset.
3. Select the addresses you want to delete.
4. Click **Delete**.  
Civic Platform removes the address from the list.

## Managing Address Contacts

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Civic Platform provides the ability to build associations between contacts and addresses. This allows for a contact to have address information independent of the owner and parcel relationship. If necessary, a contact can also have an address that is associated with a parcel.

### Topics

- [Adding a Contact to an Address](#)
- [Searching for a Contact to Apply to an Address](#)
- [Deleting a Contact from an Address](#)

### Adding a Contact to an Address

Associate a new contact with an address.

#### To associate an address to a contact

1. Navigate to the Address portlet.  
Civic Platform displays the Address detail page.
2. Click on the Contact tab.  
Civic Platform displays the address contact list page.
3. Click **New**.  
Civic Platform displays the contact fields.
4. Complete the fields as described in [Contact Detail Fields](#).
5. Click **Submit**.  
Civic Platform displays the contact in the contact list portlet.

### Searching for a Contact to Apply to an Address

If a contact already exists in Civic Platform, you can search for it and apply it to an address.

#### To search for a contact

1. Navigate to the Address portlet.  
Civic Platform displays the Contact list page.
2. Click the Contact tab.  
Civic Platform displays the contact address list page.
3. Click **Look Up**.  
Civic Platform displays the contact search page.
4. Enter the search criteria in the contact field(s.)
5. Click **Submit**.  
Civic Platform displays the results from the search.
6. Select the contact you want to associate with the address.
7. Click **Select**.

## Deleting a Contact from an Address

You can delete a contact from an address if the person is no longer associated with it.

### To delete a contact from an address

1. Navigate to the Address portlet.  
Civic Platform displays the Address list page.
2. Click the Contact tab.  
Civic Platform displays the Contact list page.
3. Select the contact you want to delete.
4. Click **Delete**.  
Civic Platform deletes the contact from the address.

## Associating an Address with a Public User

Once you have created addresses, you can use the Associated Public User tab to associate one or more public users to an address, or to disassociate one or more public users from an address.

### To associate an address with a public user

1. Navigate to the Addresses portlet and use Search to locate the address you want to work with.
2. Click the link in the **Street #** column for the target address.  
Civic Platform displays the address details.
3. Click the Associated Public User tab.  
Civic Platform displays the Associated Public User list portlet.
4. Click **Look Up**.  
Civic Platform displays the Associated Public User search portlet.

Address: 1 E AL CT, SACRAMENTO, CA 95838

Menu ▾ Submit Reset Cancel Help

Associated Public User (1)

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business Name	State	City
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	Zip	Work Phone
<input type="text"/>	<input type="text"/>	(+ <input type="text"/> ) <input type="text"/> (Country) Area code & Number
Home Phone	Cell Phone	Pager
(+ <input type="text"/> ) <input type="text"/> (Country) Area code & Number	(+ <input type="text"/> ) <input type="text"/> (Country) Area code & Number	<input type="text"/>
Fax	Preferred Phone	Preferred Contact Channel
(+ <input type="text"/> ) <input type="text"/> (Country) Area code & Number	--Select-- ▾	--Select-- ▾
User ID	Password request question	Password request answer
<input type="text"/>	<input type="text"/>	<input type="text"/>
User Role	Country/Region	E-mail
--Select-- ▾	--Select-- ▾	<input type="text"/>
SSN	FEIN	
<input type="text"/>	<input type="text"/>	

5. Enter search criteria as needed and click **Submit**.  
Civic Platform returns a list of public users that meet the search criteria.
6. Choose the public user whom you want to associate with the address.
7. Click **Connect**.  
Civic Platform creates a link between the address and the public user.

Address: 1 E AL CT, SACRAMENTO, CA 95838

Menu ▾ Look Up Delete Help

Associated Public User (1)

<input type="checkbox"/>	E-mail	Last Name	First Name	User ID	Business Name	Address
<input type="checkbox"/>	****lydia.moreda@mycl...	Moreda	Lydia	lydia.moreda@myclearwater.com		100 South Myrtle Avenue

8. If necessary, complete any of these options:
  - To view public user details, click the link for the public user that you want to view.
  - To remove the link between an address and a public user, select the public user you want to remove and then click **Delete**.



## Viewing PM Schedules for an Address

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You can view the list of PM schedules that a given address is linked to.

### To view PM schedules for an address

1. Navigate to the **Address** portlet.

Civic Platform displays the Address list page.

2. Select the address which you want to view the linked PM schedules.

Civic Platform displays the detail portlet for the address.

3. Click the **PM Schedules** tab.

Civic Platform displays the PM Schedules list with all the PM schedules to which the address is linked.

Most fields in the list are standard PM schedule fields (see [Preventative Maintenance Schedule Fields](#)).

A few additional fields, as described below, give more information on the PM schedules with the address.

<b>Last Date</b>	The Schedule Date of the last work order for this address.
<b>Next Date</b>	This field equals to the Next Schedule Date configured in the PM schedule.
<b>Previous Work Order Number</b>	The number of the work order that is generated most recently by the PM schedule for the address.

## Working with External Addresses

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External addresses are from external data source. Your system administrator can configure Civic Platform in a way that allows you to associate external addresses with records, assets or PM Schedules. When you search records, assets, or asset condition assessments, you may search by their associated external addresses.

In the Address portlet, you can search and open the details of an external address, and view the records, assets and PM schedules that are associated with it in the Record List tab, the Assets tab, and the PM Schedules tab.

### To add external address to a record, asset or a PM schedule

1. Navigate to the **Address** tab in the Record, Assets or PM Schedules portlet.  
Civic Platform displays the Address list page.
2. Click **Look Up.** and enter search criteria to locate an external address.
3. Select the external address you plan to add to the record, asset, or PM schedule.
4. Click **Select.**  
Civic Platform adds the external address to the record, asset or PM schedule.

## Examining Address Details

The following table lists and defines the default fields that may be available as you work with addresses.

Table 85: Address Fields

<b>Address Description</b>	A description of the address.
<b>Address Line 1</b>	The first line of the address.
<b>Address Line 2</b>	The second line of the address.
<b>Address Type Flag</b>	The current status of this address record. You cannot associate disabled addresses with a work order or asset. Use the drop-down list when searching to find either Disabled or Enabled addresses or both.
<b>Address Type</b>	The address type code for this address record.
<b>Audit Date</b>	The date when the address was created or modified.
<b>Audit ID</b>	The identification code of the person who created or modified the address.
<b>Audit Status</b>	The status of this address record.
<b>City</b>	The city in which the address is located.
<b>Country/Region</b>	The country or region in which the address is located.
<b>County</b>	The county in which the address is located.
<b>Description</b>	A description of the address.
<b>Direction</b>	The street direction. For example, choose N to indicate a north direction. This usually indicates the directional area of a city or street, for example North Broadway.
<b>Distance</b>	Enter a distance from another landmark used to locate the address.
<b>End Fraction</b>	In combination with the Street # fields, it indicates a fractional street number. You can specify a range of fractional street numbers in the corresponding Start and End fields.
<b>Event ID</b>	Any event scheduled for this address.
<b>House # Alpha (end)</b>	The ending street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street name and number is "10-23A WHITESTONE", "23A" is the ending street number.
<b>House # Alpha (start)</b>	The beginning street number that makes up the address. You can enter alphanumeric characters in this field. For example, if the street name and number is "10-23A WHITESTONE", "10" is the beginning street number.
<b>Inspection District</b>	The inspection district in which the address is located.
<b>Inspection District Prefix</b>	The prefix for the inspection district in which the address is located.
<b>Level # (end)</b>	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level # (start)</b>	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-story building/sub-complex.
<b>Level Prefix</b>	The prefix for the level numbers (floor numbers) that make up the address.
<b>Neighborhood</b>	The neighborhood in which the address is located.
<b>Neighborhood Prefix</b>	The prefix for the neighborhood in which the address is located.
<b>Prefix</b>	Any part of the address that should come before the street name or number, such as a direction. For example "north" in North Willow Drive.
<b>Primary</b>	Indicates whether the address is the primary residence or business location associated with a work order or asset. Although many addresses can be associated with an item, only one address can be marked as the primary address. If the primary address needs to be deleted, change this field to No and delete.
<b>Reference Address ID</b>	The identification of the reference address.

<b>Secondary Road</b>	Use this field and the Secondary Road Number field as an extra description for the location when two roads that cross or a street with two names makes up the address of the location. Enter the name of the secondary road or enter the alternative name of the street in this field.
<b>Secondary Road Number</b>	The number of the address's secondary road.
<b>Source Flag</b>	The Accela permitting system that stores this address information, such as Civic Platform, Kiva, or Tidemark.
<b>Source Number</b>	A number that identifies the Accela permitting system that stores this address information.
<b>Start Fraction</b>	In combination with the Street # fields, it indicates a fractional street number. You can specify a range of fractional street numbers in the corresponding Start and End fields.
<b>State</b>	The state in which the address is located.
<b>Street # (Start/End)</b>	The street number(s) of the address. If the address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Otherwise, you can specify a singular street number in either field. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.
<b>Street Address</b>	Use this field as an extra description for the location. When two street addresses refer to the same location, enter the second address in this field. Or when your agency supports multiple languages, enter the address in the secondary language.
<b>Street Name</b>	The street name for this address.
<b>Street Suffix (Direction)</b>	Use the drop-down list to choose the ending street direction. For example, if the street number and address is 8102 South 800 East, then enter East as the street suffix.
<b>Street Type</b>	Use the drop-down list to choose a type of street, such as "Lane" or "Boulevard."
<b>Unit # (Start/End)</b>	The unit number, for example, apartment number. If you are searching for an address, you may be able to specify a range of unit numbers in the corresponding Start and End fields.
<b>Unit Type</b>	The type of structure for this address, for example, apartment or condo.
<b>X Coordinate</b>	If you use a GPS device, this indicates the longitudinal coordinate for this address.
<b>Y Coordinate</b>	If you use a GPS device, this indicates the latitudinal coordinate for this address.
<b>ZIP Code</b>	The zip code in which the address is located.

# Conditions

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Choose a topic from the list below to learn more about working with conditions.

## **Related Information**

[Conditions Overview](#)

[Applying Conditions](#)

[Editing or Deleting an Existing Condition](#)

[Viewing an Inactive Condition](#)

[Viewing a Condition History](#)

[Working with Condition Notices](#)

[Working with Conditions of Approval](#)

[Examining Condition Details](#)

## Conditions Overview

A condition is a requirement that you can apply to an application (or component of an application), that the application must fulfill to qualify for approval. Although conditions do not necessarily impose holds, they can prolong the permitting process until they met.

For example, an applicant is applying for a permit for a structure in a historical district. The applicant may need to provide additional documentation to demonstrate compliance with special requirements for buildings in historical districts before the applicant receives the permit.

You can also use conditions to halt work. For example, if an application fails to meet certain established agency standards, you can place a hold on the application. A hold is a condition type that restricts the addition of an activity to a case. Conditions let you limit the activities, or tasks, that users can perform on an application.

Civic Platform enforces and applies conditions on all Civic Platform data, whether your agency stores address/parcel/owner (APO), contact, or licensed professional data within the Civic Platform database or in an external database. Conditions also apply to individual components of an application such as addresses, parcels, owner, licensed professionals, contacts, structures, or establishment. Conditions behave the same whether you apply them to an application or to an application component.

When you clone a record, you can choose to clone record conditions and inspection conditions along with other data you clone. For information about cloning, see [Cloning a Record](#).

If a record contains one or more active conditions, the Condition column in the record list portlet displays the condition with the highest severity. You can click the condition link to view the details of the record conditions.

Street Address	Primary	Street Name	Address Type	Condition	Street # (start)
	No	EAST ROAD		<a href="#">Hold - DEMOCondition</a>	1

**Figure 23: Condition Column in List Portlet**

When you select or open a record with a condition, Civic Platform may display a condition status bar in the record detail portlet and allow you to change the condition details in a pop up Condition Notice (see [Working with Condition Notices](#)).

Conditions have severity levels assigned. These levels define what restrictions apply when a condition with a given security level is in place. The following table lists each severity level enforced and the restrictions applied.

**Table 86: Condition Severity Levels**

Condition	Record Results	Reference Object Results
<b>Lock</b>	A lock condition prevents you from performing certain operations on locked records. These operations include: You cannot schedule or update inspections. You cannot add or edit reference objects. You cannot process fees or do cashiering functions. You cannot process workflow tasks. You cannot edit the record status, additional information, record-specific information, or renewal information.	You cannot edit or associate locked objects with any other records. You cannot edit objects associated with a locked object.
<b>Hold</b>	A hold condition prevents you from performing certain operations. These operations include: You cannot schedule or update inspections. You cannot process fees or do cashiering functions. You cannot process workflow tasks.	You cannot edit an object that has a Hold attached.

Condition	Record Results	Reference Object Results
<b>Notice</b>	The notice condition indicates special instructions to the person who completes the record. You can associate a message, or notice with a record. Notices do not inhibit the record process in any way.	The notice condition lets you associate a message, or notice with an object, such as an address, parcel, or professional. Civic Platform displays a pop-up window when you open the record or associated object.
<b>Required</b>	This condition is unique to workflow tasks. The user must complete an activity or field before he can proceed to the next activity. You can update the workflow only when the process validation is met.	

## Applying Conditions

You can apply standard conditions which are pre-defined by your agency, or you can apply your own conditions. For example, if an applicant fails to pay fees, you can manually lock the application.

### Topics

- [Applying a Standard Condition](#)
- [Applying a Custom Condition](#)

### Applying a Standard Condition

Standard conditions are pre-defined conditions available for you to apply when an application or application component fails to meet certain established standards.

#### To create and apply a standard condition

1. Locate and select the application or record.
2. Click the Conditions tab.  
Civic Platform displays conditions on the record tab.
3. Click **New**.  
Civic Platform displays the custom conditions form.
4. Click the **Standard Condition** link next to the Type drop-down list.  
Civic Platform displays the standard conditions form.
5. Complete the form with available data. See [Conditions Form Fields](#) for field definitions.
6. Click **Submit**.  
Civic Platform displays the Standard Conditions that match your search criteria.
7. Select the standard conditions you want to apply.




#### Note:

Your agency must configure Civic Platform to allow the application of multiple Standard Conditions simultaneously.

8. Click **Select**.

Civic Platform applies the standard condition(s) you selected, and displays the conditions on the Conditions tab for the selected application.

Record ID: BUS-000044

 This record was placed on HOLD on 2013-02-14.  
Condition: Severity: Hold  
Total conditions: 1 (Hold: 1)

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

Menu ▾   New   Reorder   Delete   View Log   Help

Go To ▾   < try (0)   Calendar   Classic Reports   Comments (0)   Conditions (1)   Contacts (1)   Continuing Education (0)

<input type="checkbox"/> Type	Condition Name	Status	Severity	Applied Date	Short Comments
<input type="checkbox"/> Building Plans	<a href="#">Attention</a>	Applied	Hold	02/14/2013	



## Applying a Custom Condition

If an application or application component fails to meet certain established standards, you can apply conditions to limit the activities, or tasks, that users can perform with an application or application component. If none of the predefined standard conditions apply to a particular situation, you can create a custom condition.

### To apply a custom condition

1. Click the Conditions tab.  
Civic Platform displays conditions on the record tab.
2. Click **New**.  
Civic Platform displays the custom conditions form.
3. Complete the form with available data. See [Conditions Form Fields](#) for field definitions.
4. Click **Submit**.  
Civic Platform applies the custom condition and then displays the conditions for the selected application or application component on the record tab.

## Editing or Deleting an Existing Condition

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After you apply a condition to an application or application component, it may be necessary to edit the condition details or removed unwanted conditions.

### To edit or delete an existing condition

1. Use search to locate and select the record you want to work with.  
Civic Platform displays the record details.
2. Click the Conditions tab.
3. Select the condition you want to edit/delete.
4. If you are making modifications, update the data as necessary and click **Submit**.
5. If you are deleting a condition, click **Delete**.

## Viewing an Inactive Condition

When you delete a condition from a record, the condition becomes inactive, but remains in the condition list. You can view this inactive condition by clicking the Condition Name link, but you cannot edit the detail page of it. For information about deleting a condition, see [Editing or Deleting an Existing Condition](#).

Building Permit ID: WST-1206982

Menu ▾ New Reorder Delete View Log Help

Go To ▾ Summary Record Info Address (1) Addtl Info App Specific Info App Specific Info Tables (1) Attachments (0) Comments (1) Condi

<input type="checkbox"/>	Order	Cond Type	Condition Name	Condition Comment	Status	Severity	Applied by User	Applied by Dept	Applied Date	Action by User
<input type="checkbox"/>		PCOA_SP	<a href="#">Mayi</a>		Applied		Gary Hyden	Parks	12/07/2012	
<input checked="" type="checkbox"/>		GIS	<a href="#">OUTSIDE CITY LIMITS</a>	This address is outsid...	Applied	Notice	Admin User	CDD-Admin...	11/28/2012	Admin User

↓  
Inactive Condition

Figure 24: Inactive Condition

## Viewing a Condition History

You can check the history to view the following information about a condition: current status, when updates occurred, or what changes occurred. You can also view condition history via the audit log. See [Audit Logs](#) for more information.

### To view a condition history

1. Navigate to the record portlet you are working in and use Search to locate the record you want to work with. See [Using the Search Features](#) for more information about conducting a search.

Civic Platform displays a record list.


2. Open the record containing the condition history you want to view.

Civic Platform displays the record detail portlet.

3. Click the Conditions tab.

Civic Platform displays conditions for the selected permit on the record tab.

Record ID: BUS-000044

 This record was placed on HOLD on 2013-02-14.  
Condition: Severity: Hold  
Total conditions: 1 (Hold: 1)

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

Menu ▾ New Reorder Delete View Log Help

Go To ▾ History (0) Calendar Classic Reports Comments (0) Conditions (1) Contacts (1) Continuing Education (0)

<input type="checkbox"/>	Type	Condition Name	Status	Severity	Applied Date	Short Comments
<input type="checkbox"/>	Building Plans	<a href="#">Attention</a>	Applied	Hold	02/14/2013	

4. Click the condition name link.

Civic Platform displays condition details for the selected permit.

5. Click the Condition History tab.

Civic Platform displays the condition history for the selected permit.

Record ID: BUS-000044

Menu ▾ Cancel Help

Condition Detail Condition History

Action	Group	Type	Condition Name	Status	Status Date	Severity	Applied Date	Effective Date
Add	Building	Building ...	<a href="#">Attention</a>	Applied		Hold	02/14/2013	

## Working with Condition Notices

If a record has one or more conditions including general conditions and conditions of approval with the **Display Condition Notice** field set to Yes (see [Conditions Form Fields](#)), Civic Platform displays the condition status bar in the record detail portlet. The image shown below is an example of the condition status bar with a hold notice.



**Figure 25: Condition Notice on a Record**

The condition status bar displays the condition with the highest severity using a “Yes” Display Notice setting, along with the date of the last update. The condition status bar also displays the total number of conditions by severity applied to the record. The total number, however, does not count the conditions without the severity specified.

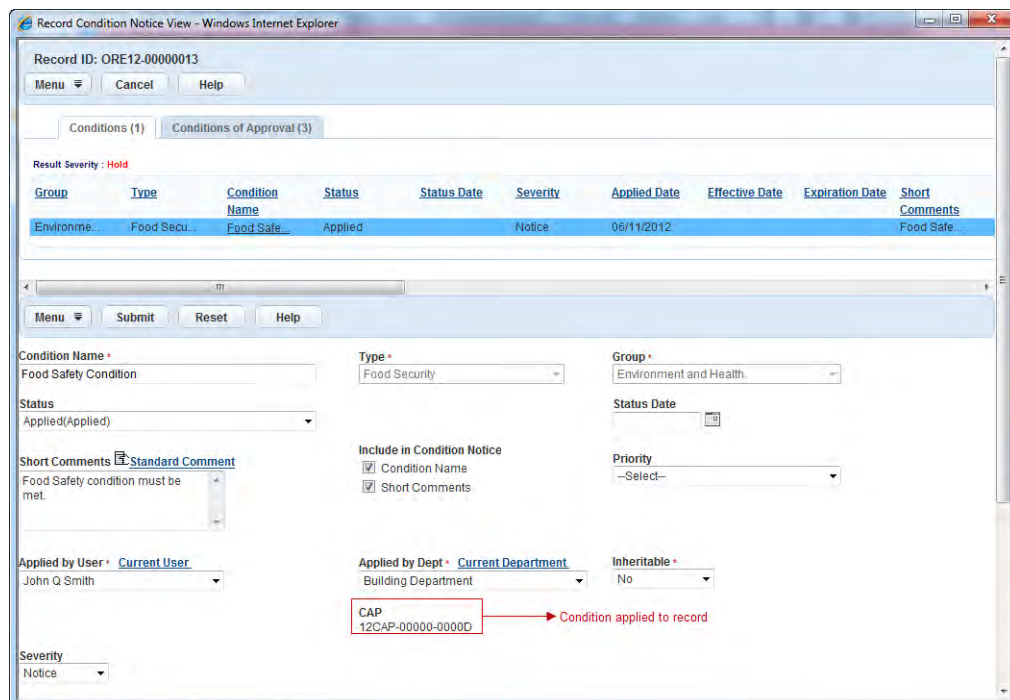
### To address the applied conditions on a record

1. Navigate to the record with conditions, and open the record detail portlet.

If one or more conditions have the Display Notice field set to Yes, Civic Platform displays the condition status bar in the record detail portlet.

2. Click the **Learn more...** or **View notice** link in the condition status bar.

Civic Platform displays the Condition Notice of the record in a pop-up window. The Conditions tab displays the general conditions applied to the record and its component such as the address, parcel, and owner. The Conditions of Approval tab displays the conditions of approval applied to the record and its related inspection.



3. Do any of the following:

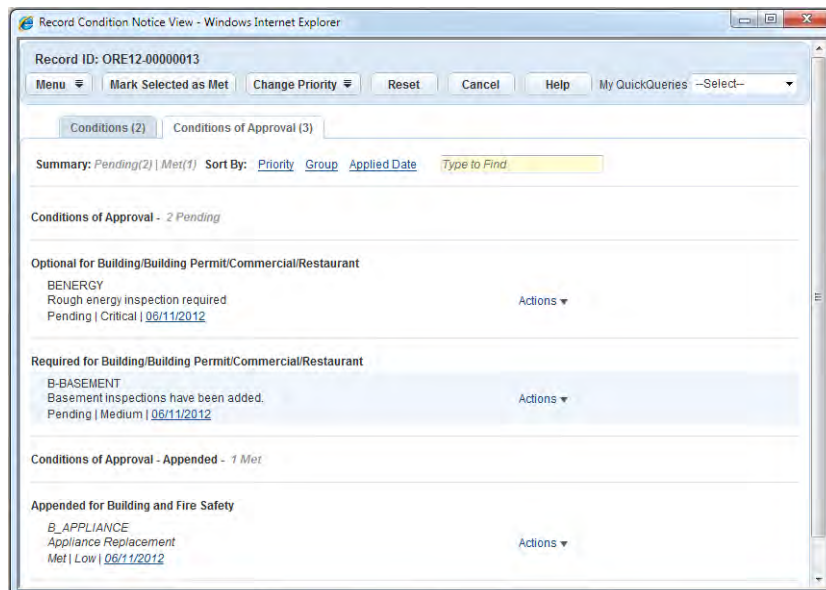
- Click the Conditions tab and do all of the following:
  1. Click a condition in the Condition Name column.  
Civic Platform displays the details of the selected condition below the condition list.
  2. Complete one of these steps:
    - a. Make changes to any of the fields, and click **Submit** to save the changes. For a description of condition fields, see [Examining Condition Details](#).
    - b. If the condition severity is Hold, you can click **Override** to change the severity to none.
    - c. If the condition severity is Lock, you can click **Unlock** to change the severity to none.
    - d. Click **Reset** to undo the change that is not submitted.



**Note:**

When you click **Unlock** or **Override**, the Condition Notice window validates and saves the existing field values (including changes) of the condition, before unlocking or overriding the condition.

- Click the Conditions of Approval tab and complete any of these steps:



**Note:**

If you want to delete a condition of approval, go to the Conditions of Approval tab for a record, an inspection, or a record set. The Condition Notice window does not provide you a way to delete any conditions of approval.

- View the details and status history of a condition of approval. See [Viewing a Condition of Approval](#) for more information.
- Update the status, priority, and details for a condition of approval. See [Updating or Deleting Conditions of Approval](#) for more information.
- Restore an updated condition of approval to its original state. See [Restoring Conditions of Approval](#).

## Working with Conditions of Approval

---

Use conditions of approval to define a list of requirements to be met before an applicant receives approval for a permit or an inspection. Generally, Civic Platform applies conditions of approval to records, inspections, or set members in a record set. The process of working with conditions of approval is very similar for records, inspections, and record set members. The only difference is the starting portlet. Besides, the Conditions of Approval tab for a record or a record set displays the conditions of approval applied to the record or the set members and those applied to the inspections associated with the record or the set members. The Conditions of Approval tab for an inspection only displays the conditions of approval applied to the inspection itself. The following topics use records as an example. You can, however, also follow the topics to manage the conditions of approval for inspections and record set members.

### Topics

- [Applying a Condition of Approval](#)
- [Updating or Deleting Conditions of Approval](#)
- [Restoring Conditions of Approval](#)
- [Viewing a Condition of Approval](#)

### Applying a Condition of Approval

You can apply standard conditions of approval that are pre-defined by your agency administrator to records, inspections, or set members in a record set.

**Note:**

You cannot manually create a custom condition of approval and apply it to a record, an inspection, or a record set member.

---

### To look up a standard condition of approval and apply it

1. Navigate to the desired portlet and use Search to locate and select the record you want to work with. For inspections, locate and select the desired inspection to display the Inspection detail portlet. For record set members, locate and select the desired record set to display the Set detail portlet. Civic Platform displays the Record detail portlet.
2. Click the Conditions of Approval tab. Civic Platform displays the Conditions of Approval list portlet.



Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
 Condition: BENERGY : Rough energy inspection required Severity: Hold  
 Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

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

Go To Record Summary Contacts (1) Inspections (1) Conditions (0) Conditions of Approval (6) Application History (1) Workflow

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

Conditions of Approval - 2 Pending 1 Met

Optional for Building/Building Permit/Commercial/Restaurant

BENERGY  
 Rough energy inspection required  
 Pending | Critical | 05/10/2012 Actions

Required for Building/Building Permit/Commercial/Restaurant

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

BCE\_ALM  
 Fire alarm permit completed  
 Pending | Low | 05/10/2012 Actions

3. Click **New**.

Civic Platform displays the Standard Condition of Approval search portlet.

Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
 Condition: BENERGY : Rough energy inspection required Severity: Hold  
 Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

Menu Submit Reset Cancel Help

Go To Conditions of Approval Address Add'l Info GIS Assess Fee History Calendar Classic Reports Comments

Condition Name  
 Severity --Select--

Condition Group --Select--  
 Short Comments  
[check spelling](#)

Condition Type --Select--  
 Long Comments  
[check spelling](#)

Resolution Action  
[check spelling](#)

Public Display Message  
[check spelling](#)

Display Notice  
 Accela Automation  
 ACA  
 ACA Fee Estimate Page

Inheritable --Select--

Include in Condition Notice  
 Condition Name  
 Short Description

Priority --Select--

Template Field Label  
 Template Table Field Value

Template Field Value  
 Template Table Field Label

4. Complete any fields that display. For a description of the fields, see [Conditions Form Fields](#).

5. Click **Submit**.

Civic Platform returns a list of standard conditions of approval that match your search criteria.

Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
Condition: BENERGY : Rough energy inspection required Severity: Hold  
Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

Menu Select Search Cancel Help

Go To Conditions of Approval Address Add'l Info GIS Assess Fee History Calendar Classic Reports Comments

Type	Condition Name	Severity	Group	Comment
CAUTION!	Optional ...	Notice	Group B	Optional ...

6. Select the desired standard condition of approval and click **Select**.

Civic Platform applies the standard condition of approval that you selected to the record, and displays it on the Conditions of Approval tab for the record.

## Updating or Deleting Conditions of Approval

On the Conditions of Approval tab, you can change the status or the priority of one or more conditions of approval, edit the details of a condition of approval, and delete the condition of approval that you no longer want.

### To manage conditions of approval

1. Navigate to the desired portlet and use Search to locate and select the record you want to work with.

For inspections, locate and select the desired inspection to display the Inspection detail portlet. For record set members, locate and select the desired record set to display the Set detail portlet.

Civic Platform displays the Record detail portlet.

2. Click the Conditions of Approval tab.

To access the Conditions of Approval tab from the Condition Notice window, see [Working with Condition Notices](#).

Civic Platform displays the Conditions of Approval list portlet.

Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
Condition: BENERGY : Rough energy inspection required Severity: Hold  
Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

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

Go To Record Summary Contacts (1) Inspections (1) Conditions (0) Conditions of Approval (6) Application History (1) Workflow

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

Conditions of Approval - 2 Pending 1 Met

**Optional for Building/Building Permit/Commercial/Restaurant**

BENERGY  
Rough energy inspection required  
Pending | Critical | [05/10/2012](#) [Actions](#)

**Required for Building/Building Permit/Commercial/Restaurant**

B-BASEMENT  
Basement inspections have been added.  
Met | Medium | [05/10/2012](#) [Actions](#)

BCE\_ALM  
Fire alarm permit completed  
Pending | Low | [05/10/2012](#) [Actions](#)

3. Complete any of these options:

- To change the status of conditions of approval, do any of the following:

- Select one or more Pending conditions of approval and click **Mark Selected as Met**.  
Civic Platform sets the status of the selected conditions of approval to Met.
- Click the **Actions** link next to the desired Met condition of approval and click **Mark Condition as Pending**.  
Civic Platform sets the status of the selected condition of approval to Pending.
- Click the **Actions** link next to the Met condition of approval and click **Override Met Status**.  
Civic Platform reverts the status of the selected condition of approval to Pending, which resets the status history of the condition of approval.
- To change the priority of conditions of approval, do any of the following:
  - Select one or more conditions of approval, hover your mouse over **Change Priority**, and then click the desired priority level.  
Civic Platform sets the priority of the selected conditions of approval to the corresponding level.
  - Click the **Actions** link next to the desired condition of approval, hover your mouse over **Change Priority**, and then click the desired priority level.  
Civic Platform sets the priority of the selected condition of approval to the corresponding level.
- To edit the details of a condition of approval, open it as [Viewing a Condition of Approval](#) instructed and edit the fields that appear.  
For a description of the fields, see [Conditions Form Fields](#).
- To delete conditions of approval, do any of the following:
  - Select one or more conditions of approval and click **Delete**.  
Civic Platform deletes the selected conditions of approval.
  - Click the **Actions** link next to the desired condition of approval and then click **Remove**.  
Civic Platform deletes the selected condition of approval.

## Restoring Conditions of Approval

When you update the status or the priority for a condition of approval by mistake, you can restore the condition of approval to its original state. All the details about the condition of approval are just the same as they were when you first added the condition of approval; however the creation of the condition of approval, and other actions clear from the status history.

### To restore conditions of approval

1. Navigate to the desired portlet and use Search to locate and select the record you want to work with.  
For inspections, locate and select the desired inspection to display the Inspection detail portlet. For record set members, locate and select the desired record set to display the Set detail portlet.  
Civic Platform displays the Record detail portlet.
2. Click the **Conditions of Approval** tab.  
To access the Conditions of Approval list from the Condition Notice window, see [Working with Condition Notices](#).  
Civic Platform displays the Conditions of Approval list portlet.

Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
Condition: BENERGY : Rough energy inspection required Severity: Hold  
Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

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

Go To ▾ Record Summary Contacts (1) Inspections (1) Conditions (0) Conditions of Approval (6) Application History (1) Workflow

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

Conditions of Approval - 2 Pending 1 Met

Optional for Building/Building Permit/Commercial/Restaurant

BENERGY Rough energy inspection required Pending   Critical   <a href="#">05/10/2012</a>	Actions ▾
--	-----------

Required for Building/Building Permit/Commercial/Restaurant

B-BASEMENT Basement inspections have been added. Met   Medium   <a href="#">05/10/2012</a>	Actions ▾
BCE_ALM Fire alarm permit completed Pending   Low   <a href="#">05/10/2012</a>	Actions ▾

3. Select one or more conditions of approval that you want to restore and click **Reset**.

## Viewing a Condition of Approval

You can view the details and status history of a condition of approval from the Conditions of Approval tab.

### To view a condition of approval

1. Navigate to the desired portlet and use Search to locate and select the record you want to work with. For inspections, locate and select the desired inspection to display the Inspection detail portlet. For record set members, locate and select the desired record set to display the Set detail portlet. Civic Platform displays the Record detail portlet.

2. Click the Conditions of Approval tab.

To access the Conditions of Approval list from the Condition Notice window, see [Working with Condition Notices](#).

Civic Platform displays the Conditions of Approval list portlet.

Record ID: ORE12-0000038

This record was placed on HOLD on 2012-05-10.  
Condition: BENERGY : Rough energy inspection required Severity: Hold  
Total conditions: 2 (Hold: 1, Required: 1)  
[Learn more about this hold and how to resolve it](#)

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

Go To ▾ Record Summary Contacts (1) Inspections (1) Conditions (0) Conditions of Approval (6) Application History (1) Workflow

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

Conditions of Approval - 2 Pending 1 Met

Optional for Building/Building Permit/Commercial/Restaurant

BENERGY Rough energy inspection required Pending   Critical   <a href="#">05/10/2012</a>	Actions ▾
--	-----------

Required for Building/Building Permit/Commercial/Restaurant

B-BASEMENT Basement inspections have been added. Met   Medium   <a href="#">05/10/2012</a>	Actions ▾
BCE_ALM Fire alarm permit completed Pending   Low   <a href="#">05/10/2012</a>	Actions ▾

3. As needed, locate the condition of approval that you want to view by any of these methods:

- Select a user-defined QuickQuery from the My QuickQuery drop-down list.  
Civic Platform only displays the conditions of approval that match the QuickQuery.
- Click the link in the Sort By field.  
Civic Platform sorts the conditions of approval by the specified field.
- Enter the keyword of the condition of approval in the Type to find field.  
Civic Platform highlights the conditions of approval that have the keyword in red.

4. Do any of the following:

- To view the details of a condition of approval, click the **Actions** link next to the desired condition of approval and then click **Open**.

For a description of the fields, see [Conditions Form Fields](#).

Civic Platform displays the Conditions of Approval Detail portlet.

- To view the status history of the condition of approval, click the status date link.  
Civic Platform displays the Status History pop-up window.

B-BASEMENT

Basement inspections have been added. Actions ▾

| Medium | Met | 05/10/2012

Conditions of Approval Appended for Building

B\_DUST

Dust Control Plan

| Critical | Met | 05/10/2012

B\_FEES OWE

Fees due (owed) Actions ▾

| Critical | Met | 05/10/2012

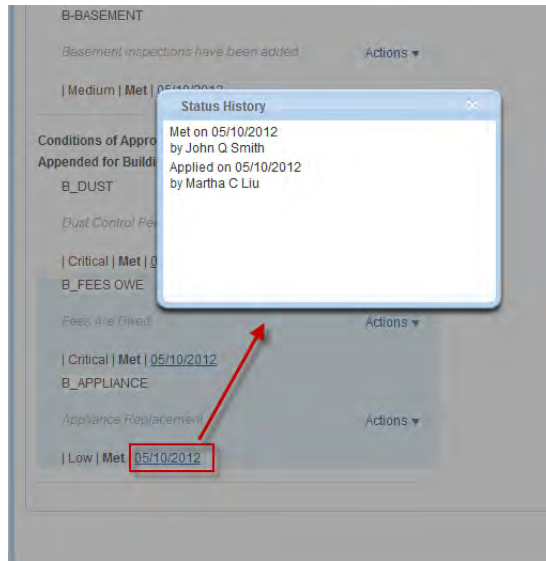
B\_APPLIANCE

Appliance Replacement

| Low | Met | 05/10/2012

Status History

Met on 05/10/2012  
by John Q Smith  
Applied on 05/10/2012  
by Martha C Liu




## Examining Condition Details

The following tables list and define the fields that may be available in the forms and portlets you encounter when working with Conditions.

### Conditions Form Fields

The following table defines the default fields on the condition form.

Table 87: Conditions Form Fields

<b>Action by Dept</b>	The department responsible for following up with the condition status.
<b>Action by User</b>	The staff member responsible for following up with the condition status.
<b>Additional Information</b>	Used for condition text if the body of your comment text exceeds the character limitations of the Short Comments and Long Comments fields. This unlimited text field supports the insertion of standard comments via the Standard Comments picker. It also supports HTML formatting so that text pasted into the field from another source retains its formatting.   <b>Note:</b> This field is not searchable. However, the ability to perform tag-based searches based on key words entered into ASI fields is available. Your agency can configure the Conditions portlet to include ASI fields for users to enter important 'searchable' words from the Additional Info field.
<b>Applied by Dept</b>	The department responsible for applying the condition.
<b>Applied by User</b>	The staff member responsible for applying the condition.
<b>Applied Date</b>	The date when you want to apply this condition. The Applied Date defaults to the current date in any of the following scenarios: 1) you are adding a standard condition, 2) you are creating a new condition, or 3) The condition is auto-assigned to a record.
<b>Condition Name</b>	A description of the condition. For example, "Outstanding Balance."
<b>Display Notice</b>	This indicates whether or not to activate the "Include in Condition Notice" options. When a user accesses a record, he can see the Condition Notice in the condition status bar.
<b>Effective Date</b>	The date when you want this condition to become effective.
<b>Expiration Date</b>	The date when you want this condition to expire.
<b>Group</b>	The condition group, which is an attribute of a condition that organizes condition types.
<b>Include In Condition Notice</b>	The two items here display when a user sees Mark the Condition Name check box to expose the name of the condition to the users. The Short Description is the Short Comments.
<b>Inheritable</b>	This defines whether or not Civic Platform checks for inheritable conditions when a user associates a child record with a parent record. If found, the inheritable conditions copy to the child record with the Status of "Applied."
<b>Long Comments (4000 char max)</b>	Used for condition text when the body of condition comments exceeds the character limitations of the Short Comments field, but does not exceed the 4000 character limitation for this field. The contents of this field are searchable. This field supports the insertion of standard comments via the Standard Comments picker.
<b>Object Name</b>	The type of object you are applying the condition to, such as Record, Inspection, Asset, Address, Parcel, Owner, Contact, Licensed Professional, Structure, or Establishment.

<b>Object Value</b>	The ID number or name of the object that the condition is applied to. If the applied object is an address, this field shows address-specific data.
<b>Priority</b>	The priority level of the condition.
<b>Public Display Message</b>	Text in this field displays in Accela IVR and Citizen Access in the condition notice or condition status bar for the Condition Name for the public user. This text displays in place of Condition Name and Short Description values.
<b>Resolution Action</b>	The actions or set of tasks the user should follow to resolve a condition severity level so the user can move the application forward.
<b>Severity</b>	The severity of the condition. You can choose Required, Lock, Hold, or Notice.
<b>Short Comments (2000 char max)</b>	Used for condition text when the body of your condition comment does not exceed the 2000 character limitation for this field. The contents of this field are searchable. This field supports the insertion of standard comments via the Standard Comments picker. To expose the contents of this field to agency and public users, select <b>Short Comments</b> for the <b>Include in Condition Notice</b> field.
<b>Status</b>	The condition status. With each status, a status type of “Applied” or “Not Applied” displays in parentheses.
<b>Status Date</b>	The date when the condition status gets changed. The field defaults to the current date when the Status value changes.
<b>Type</b>	This is an agency-defined condition type.

## Standard Condition Field Descriptions and Actions

This table lists and defines the default fields that may be available to you as you work with standard conditions.

Table 88: Standard Condition Field Descriptions and Actions

<b>Condition Name</b>	This is the name or number for the standard condition name. When a user accesses an application and applies a condition, this is the Condition Name they will select.
<b>Condition Type</b>	Select the Condition By Type name for the condition name or number you are creating.  The condition type is an indicator in Civic Platform that ensures that requirements are met before a record can proceed. For example, there may be a “Planning” condition type for all conditions that apply only to objects in the planning review stage.
<b>Display Notice</b>	Choose either <b>Yes</b> or <b>No</b> .  When you select <b>Yes</b> , the “Include in Condition Notice” options are activated. When a user accesses a record and this is set to <b>Yes</b> then the user can see the Condition Notice in the condition status bar.  If you set this to <b>No</b> then the user does not see the Condition Notice in the condition status bar. The condition still applies to the record, however.
<b>Include In Condition Notice</b>	The two items here will display when a user sees Mark the Condition Name check box to expose the name of the condition to the users. The Short Description is the Short Comments.



<b>Inheritable</b>	<p>This is a required field with <b>No</b> as the default.</p> <p>If this is set to <b>Yes</b> then when a child record is associated with a parent record, Civic Platform checks for inheritable conditions. If found, the inheritable conditions are copied to the child record with the Status of “Applied.”</p> <p>If the parent record condition status is updated (Status of “Not Applied”) then the child record condition status is not updated. If this is set to <b>No</b> then no conditions are copied or inherited by the child record when it is created from a parent record. To display this field so you can set its options, you must set FID 8365 Inheritable Editable to Full Access. For details on setting this Function Identification number, see the section “Maintaining Functions and FIDs” in the <i>Civic Platform On-premise Administrator Supplement</i>.</p>
<b>Long Comments (4000 char max)</b>	<p>Enter a paragraph long description of the condition name. Enter any comments to help identify the purpose of the standard condition.</p>
<b>Public Display Message</b>	<p>This field relates only to Accela IVR and Citizen Access.</p> <p>If text is entered into this field then in IVR and Citizen Access:</p> <ul style="list-style-type: none"> <li>a) The text displays in the condition notice or condition status bar for the Condition Name for the citizen user.</li> <li>b) The Condition Name and Short Description will not display for the citizen user.</li> </ul> <p>If text is not entered into this field then in IVR and Citizen Access:</p> <ul style="list-style-type: none"> <li>a) The Condition Name and/or Short Description displays in the citizen user Condition Notice.</li> <li>b) If Condition Name and Short Description are not selected, the Condition detail does not display in the Condition Notice for a citizen user.</li> </ul>
<b>Resolution Action</b>	<p>Enter the actions or set of tasks the user should follow in order to resolve the condition severity level so the user can move the application forward.</p>
<b>Short Comments (2000 char max)</b>	<p>Enter a brief description of the condition name.</p> <p>The text may describe the situation that requires the condition to be applied. You can set these short comments to display when a user accesses a permit with this condition applied to it. The comment displays in the condition status bar.</p>
<b>Severity</b>	<p>Choose one of the levels of severity among conditions and apply it to the Condition Name.</p> <p>The levels are Lock, Hold, Notice, or Required. For a full explanation of each severity level and the restrictions it places on an application, see <a href="#">Condition Severity Levels</a>.</p>
<b>Status</b>	<p>Choose either Enabled or Disabled mode for the condition type.</p> <p>Enabled means that the Condition Name can be applied to the assigned Application Types when a user creates a new application. Disabling a condition type will not disable existing conditions of that type. It only prevents users from choosing that type when applying new conditions. The Condition Name is still available in the conditions list for the administrator to Enable at a later date.</p>

# Reports

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Choose a topic from the list below to learn more about working with reports.

**Related Information**

[Reporting Overview](#)

[Accessing and Running Reports](#)

[Creating Your Own Reports Category](#)

[Sending a Report by Email](#)

[Specifying Report Parameters](#)

## Reporting Overview

---

Your agency can set up reports that you can run to extract current data from Civic Platform. Agencies typically set up their reports by module and user group, enabling them to control the which reports are available both by module and by user group. For example, reports can be configured so that building inspectors see only those reports that apply to inspections, and Public Works users see only those reports relating to licensing, planning or service requests.

For additional information about which reports are available to you, please contact the agency administrator.

For a list of standard reports available in Civic Platform, see Appendix A, Standard Reports, in the *Accela Civic Platform Administrator Guide*.

## Accessing and Running Reports

You can access Civic Platform reports in two ways:

- [Accessing and Running a Report via the Reports Portlet](#)
- [Accessing and Running a Report via a List Portlet](#)

Both access processes are described below.



### Note:

Reports can also be tied to workflow tasks so that they run automatically when the status of the task is updated. The report appears in a new window and can be configured to be sent to a printer automatically based on your browser settings.

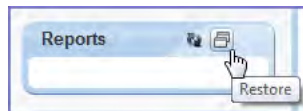
For information about how to add a report to a workflow task or how to modify existing settings, please contact your agency administrator.

### Accessing and Running a Report via the Reports Portlet

You can access the Reports portlet directly from the home console. The reports listed in this portlet are typically grouped by category, and can include management, revenue, and other types of reports. It may also contain a My Reports category that allows you to create your own list of reports that you use on a regular basis by copying reports from other categories into your My Reports category.

#### To access the Reports portlet

1. If your Civic Platform Home page is configured to display a Reports portlet, restore it if collapsed, then maximize it if desired (**Maximize** button replaces the **Restore** button).



Otherwise, click the Reports link in the Main Links section of your console.

Civic Platform displays the Reports portlet with the available categories listed.



2. Click the right arrow bullet for the report category containing the report you want to run to expand it. Civic Platform displays the reports available in the selected category.



3. If the report you want to run is a report you use regularly, consider adding it to your My Reports category by right clicking the report and choosing **Add to My Reports**. See [Creating Your Own Reports Category](#) for more information.
4. Click the report you want to run.  
If the report requires additional parameters, Civic Platform prompts you to enter the needed parameters.

 A screenshot of a web browser window titled 'report set Parameter - Windows Internet Explorer'. The address bar shows the URL 'https://av.ist.accela.com/portlets/reports/reportShow.do?mode=show&reportId=2'. The main content area contains a dialog box with three input fields: 'Account ID', 'Record ID', and 'Agency ID'. Above the fields are three buttons: 'Submit', 'Cancel', and 'Help'. The browser's status bar at the bottom shows 'Internet'.

5. Enter the parameters for the set report and click **Submit**. For information on using parameters, see [Specifying Report Parameters](#).  
Civic Platform runs the report and displays it in a new window.

## Accessing and Running a Report via a List Portlet

Your agency may elect to enable a **Reports** menu button on portlet toolbars to provide users with ready access to reports pertinent to that portlet.



### Note:

Contact your agency administrator to learn which portlets have enabled **Reports** buttons for your agency, and which reports are available for you to use.

You may be able to run some of the reports against a selected record in the portlet. For example, choose a record, then choose the "Record Detail" from the Report menu on the record detail form portlet. Civic Platform automatically passes the Record ID for the selected record to the report and the report runs, displaying the detail for the record.

**Note:**

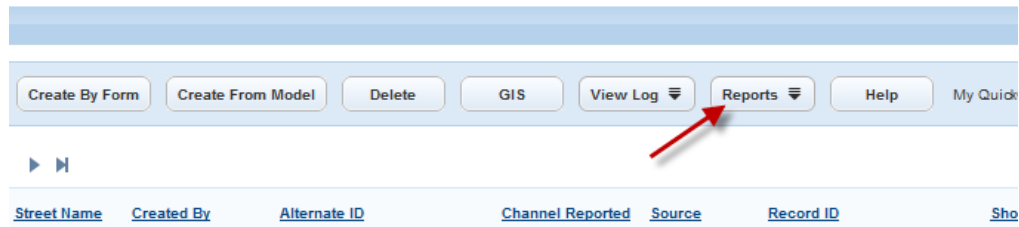
Current functionality does not support the selection of multiple records to use when running reports from a record portlet. However, your report may prompt you for parameters that enable you to narrow down the data you want displayed in the report.

If you are using the CSV Export functionality, you can select multiple records. See [Exporting Data to CSV](#) for more information.

**To access reports via a list portlet**

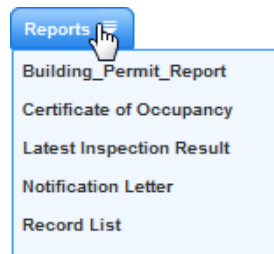
1. Navigate to the portlet you want to work in.

Civic Platform displays the selected portlet with a Reports menu button displayed.



2. Hover your mouse cursor over the **Reports** menu button to expand the menu.

Civic Platform displays the reports available for the portlet.



3. Click the report you want to run.

If the report requires additional parameters, Civic Platform prompts you to enter the needed parameters.

4. Enter the parameters for the report and click **Submit**. For information on using parameters, see [Specifying Report Parameters](#).

Civic Platform runs the report and displays it in a new window.

**Note:**

When running a report, Civic Platform may prompt you to save the report to an Electronic Document Management System (EDMS). If you do so, the report saves to the EDMS object specified by your agency administrator. Available EDMS objects include Record, Parcel, Asset Inspection, and Workflow. For more information refer to the Civic Platform Administrator Guide or contact your agency administrator.

## Creating Your Own Reports Category

---

A category called My Reports is available on the Reports Portlet. You can copy any of the reports listed in the Reports Portlet categories to your personal My Reports category, which enables you to create a convenient list of the reports that you use most.

### To add a report to the My Reports category

1. Navigate to the Reports Portlet as described in [Accessing and Running a Report via the Reports Portlet](#).

Civic Platform displays a list of report categories.

2. Expand the reports category that contains the report that you want to add.

Civic Platform displays a list of reports for the category selected.

3. Right-click the report you want to move to the My Reports category.



4. Select **Add to My Reports** by left-clicking.

Civic Platform copies the report to the My Reports category.

### To remove a report from the My Reports category

1. Navigate to the Reports Portlet as described in [Accessing and Running a Report via the Reports Portlet](#).

Civic Platform displays a list of report categories.

2. Expand the **My Reports** category.

Civic Platform displays the reports available in the My Reports Category.

3. Right-click the report you want to remove, and select **Remove from My Reports**.

Civic Platform removes the selected report from the My Reports Category.



#### Note:

When you remove a report from the My Reports category, you do not remove the report from the category where it originated; it continue to be available there.

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## Specifying Report Parameters

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When an agency administrator sets up a report, she can elect to include Accela-provided parameters which do not require user input. She can also elect to include parameter prompts, which allow you to define certain parameters for a report when you run it.

When Civic Platform prompts you to specify parameters, you have the opportunity to filter the data used in the report. For example, when running a report for a list of inspections, Civic Platform may prompt you to specify a start date and an end date. When you provide dates, you are telling Civic Platform to filter the inspections used in the report to include only those that fall within the start and end date range that you entered.

Civic Platform parameter prompts may prompt you to select from drop-down lists, check one or more boxes, or enter dates using a date picker. Follow the directions in the parameter prompt window to proceed.

If your agency uses a reporting service such as Crystal Reports, your agency administrator may set up a parameter prompt window provided by the reporting service. Not all reporting services support drop-down lists, check boxes, or date pickers. Instead, the reporting service may require you to enter parameter values exactly as stored in the database. For information on the values to use for reporting service parameter prompts, contact your agency administrator.



## Sending a Report by Email

Your agency administrator can configure reports for email distribution to contacts available via a record detail portlet. For example, you can email a building violation notice to a building owner. Your agency administrator can configure Civic Platform to send a report by email either automatically or manually. If he configures Civic Platform to send a report automatically by email, Civic Platform automatically sends the report to the contacts and licensed professionals associated with the session application. Otherwise, you must send reports manually as described below.



### Note:

You may not send reports exceeding 5 MB by email.

### To send a report by email

1. Run a report as described in either of the following:

- [Sending a Report by Email](#)
- [Accessing and Running a Report via a List Portlet.](#)

Civic Platform displays a Report Preview page with a Send Email button at the top.



2. Click **Send E-mail**.

Civic Platform displays the Send Email Report dialog which lists existing contacts from the record along with the email address on record for each contact, if available.

3. Select each contact you want to send the report to. If a desired recipient is not on the list, select the "Other" option.

4. If the email box for a selected contact is empty or if you want to use an alternate email address, enter the email address you want to use in the box to the right.

If you are entering more than one email address in a box, separate each address with a semi-colon.

5. Click **Submit**.

## Ad Hoc Reports

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Choose a topic from the list below to learn more about working with ad hoc reports.

### **Related Information**

[Ad Hoc Reports Overview](#)

[Ad Hoc Reports Configuration Requirements](#)

[Launching the Ad Hoc Report Writer](#)

[Working with Existing Reports](#)

[Designing a New Report](#)

[Designing a New Dashboard](#)

[Working with Graphs](#)

[Working with Categories](#)

[Working with the Form Layout Tool](#)

[Ad Hoc Reports Button and Field Reference](#)

## Ad Hoc Reports Overview

---

The ad hoc report writer gives users the ability to create reports and dashboards quickly and easily.

When you design a new report, the report designer leads you through a logical series of steps, beginning with the choice of a data source. After you have a data source, you can then choose the fields you want to use in your report. You can configure field attributes such as sorting and grouping, create charts and gauge panels, choose the colors and shading for your report, and define the header and the footer content. You can also define who you want to share the report with, and what permissions that you want to allow other users when interacting with your report.

If your agency has obtained a license key to access the form layout tool in ad hoc reports, you can use the form layout tool in ad hoc reports to create forms, edit forms, and add data fields.

The design process always presents users with a simple set of actions on each tab that enables even a novice report writer to create an effective report. However, the process also provides several opportunities for more advanced configuration and setup for more experienced users.

You can save reports and dashboards and categorize them into folders for easy reference. Saved ad hoc reports can be re-run as needed. You can update dashboards at the click of a button. Administrators can upload ad hoc reports to the Reports menu that is available on many portlets.

## Ad Hoc Reports Configuration Requirements

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To use the ad hoc reports feature in Civic Platform, you must install the tool on your reports server. Some additional configurations are necessary after the installation.

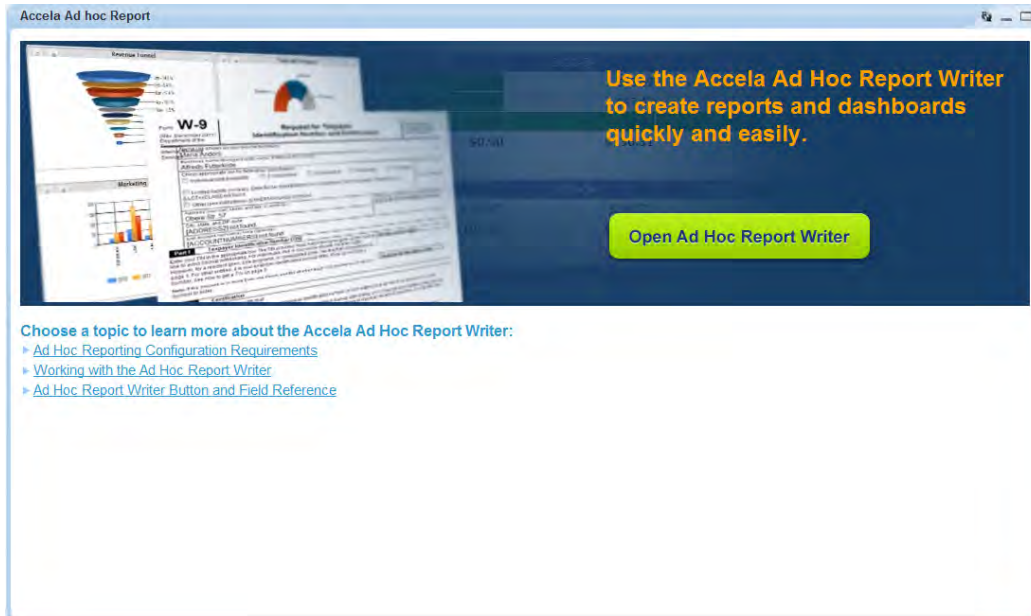
For complete instructions, see the *Civic Platform Installation Guide*, available via the [Documentation Library on Community](#) and on the FTP site.

## Launching the Ad Hoc Report Writer

You can access the ad hoc report writer and ad hoc reports documentation from the Ad Hoc Report Writer landing page.

### To access the ad hoc report writer

1. Click the Ad Hoc Reports link in the main links section of your Civic Platform console.  
The Ac Hoc Reports landing page displays.



Accela Ad hoc Report

Use the Accela Ad Hoc Report Writer to create reports and dashboards quickly and easily.

Open Ad Hoc Report Writer

Choose a topic to learn more about the Accela Ad Hoc Report Writer:

- ▶ [Ad Hoc Reporting Configuration Requirements](#)
- ▶ [Working with the Ad Hoc Report Writer](#)
- ▶ [Ad Hoc Report Writer Button and Field Reference](#)

2. Click **Open Ad Hoc Report Writer**.

## Working with Existing Reports

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### Topics

- [Running an Existing Report](#)
- [Deleting an Existing Report](#)
- [Editing an Existing Report](#)
- [Exporting a Report](#)

### Running an Existing Report

You can run an existing report from the Report List or from the Report Designer.

#### To run an existing Report from the Report List

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)) and locate the report you want to run.
2. Click the desired report name.  
The report runs and its contents display.

#### To run an existing report from the Report Designer

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Create a new report, or edit an existing report by clicking the Design icon as shown.




The Report Designer opens.

3. Click the **Preview** button on any of the tabs or click the Preview tab.  
The report runs and its contents display.

### Deleting an Existing Report

You can remove existing reports from the Report List as needed.


#### To delete a report

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)) and locate the report you want to delete.
2. Hover your mouse cursor on the desired report to reveal the report tools to the left.
3. Click .
4. The ad hoc report writer prompts you to confirm the deletion.
5. Click **OK**.  
The ad hoc report writer removes the report.

## Editing an Existing Report

You can modify existing reports in Report Designer, provided that you have permission to do so.

### To edit an existing report

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)) and locate the report you want to work with.
  - If you are on the Report List, hover your mouse cursor on the desired report to reveal the report tools to the left. Click .
  - If you are on the Report Viewer (accessed by clicking a report name in the Report List), click the **Design** button in the toolbar.
2. Make changes to your report as needed. For information about modifying information on the different tabs, refer to any of the following sections:
  - [Data Source Section and DB View Relationships Section](#)
  - [Fields Tab](#)
  - [Summary Tab](#)
  - [Chart Tab](#)
  - [Gauge Tab](#)
  - [Misc Tab](#)
  - [Style Tab](#)
3. Click **Save** to save your changes.

## Exporting a Report

You can export ad hoc reports to several different output types, where you can further manipulate the data as needed.

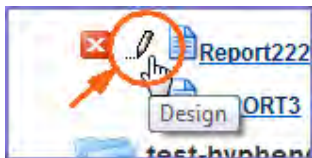


### Note:

When you export a report from Accela Ad hoc Reports, you are exporting it with 'as of' data embedded. You cannot re-run the exported version of the report to update the data. If you want updated data for an export report, you must re-run the report in Accela Ad hoc Reports and then export it again.

### To export a report

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Create a new report or edit an existing one by clicking the Design icon as shown.



The Report Designer opens.

3. Click the export button corresponding to the format you want to export to. The following formats are available:

- Adobe Acrobat PDF
- HTML
- CSV that can be imported to a spreadsheet
- Microsoft Excel
- Microsoft Word
- XML

4. After the report is downloaded, you can open or save the exported file.



## Designing a New Report

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Civic Platform ad hoc reports are easy to create and easy to modify. The design form walks you through the report creation process, making it an easy process for simple reporting needs, while providing more robust features that experienced report writers can use to create more complex reports.

The ad hoc report writer walks you through a series of tabs where you can add a data table, a report summary, a chart, and/or a panel of gauges. You can add all of these elements, or you can add only the elements that you want. For example, if you just want to create a chart for use in a dashboard, skip to the Chart tab after you select your data source and define your chart as described in [Chart Tab](#).

### Topics

- [Creating a Report](#)
- [Adding Templates to Your Data Source](#)
- [Visually Grouping by Field Value](#)
- [Creating a Calculated Column](#)
- [Adding a Pivot Column](#)

### Related Information

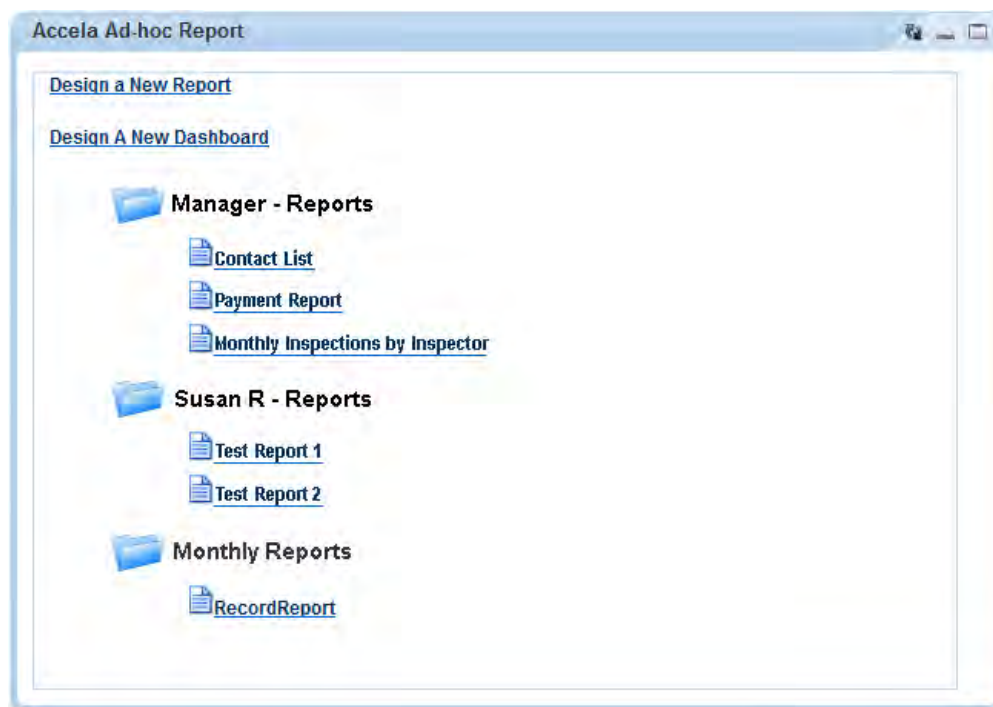
- [Izenda Report Design Guide](#)

### Creating a Report

The following procedure describes how to design a new report with all the elements included.

#### To creating a simple new report

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).  
The Ad hoc Report portlet opens and displays the Report List.



2. Click **Design a New Report**.

The Ad hoc Report Designer displays the Data Sources page which lists the DB\_VIEWS available to you for reporting.

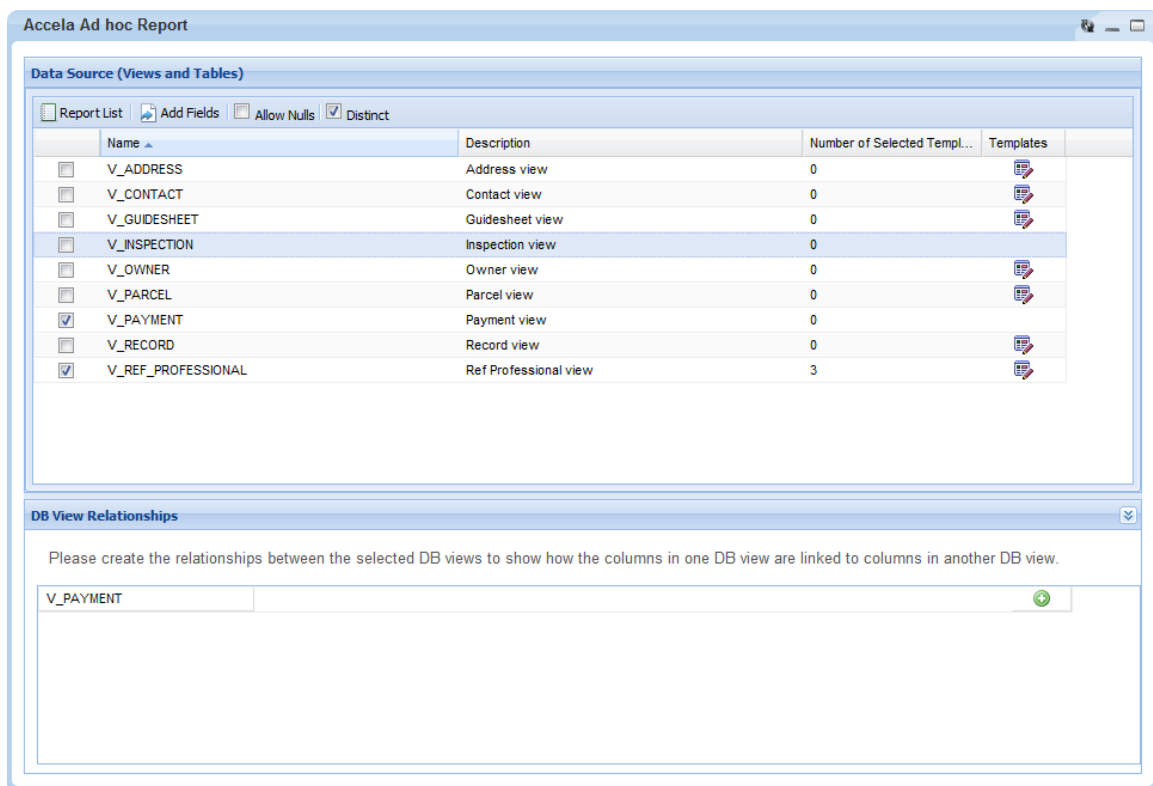
**Data Source (Views and Tables)**

Report List | Add Fields | Allow Nulls |  Distinct

	Name ▲	Description	Number of Selected Templ...	Templates
<input type="checkbox"/>	V_ADDRESS	Address view	0	
<input type="checkbox"/>	V_GUIDESHEET	Guidesheet view	0	
<input type="checkbox"/>	V_INSPECTION	Inspection view	0	
<input type="checkbox"/>	V_OWNER	Owner view	0	
<input type="checkbox"/>	V_PARCEL	Parcel view	0	
<input type="checkbox"/>	V_PAYMENT	Payment view	0	
<input type="checkbox"/>	V_RECORD	Record view	0	
<input type="checkbox"/>	V_REF_PROFESSIONAL	Ref Professional view	0	

3. Select the DB\_VIEWS you want to use in your report. If you want to use template data in your report, select the DB\_View associated with the template you want to use (see [Data Source Templates for Ad Hoc Reporting](#)).

The **Add Fields** button becomes enabled. If you selected multiple tables, the DB View Relationships section automatically expands.



4. Do one of the following:

- If you selected only one DB\_View and do not plan to use template data in your report, proceed to the next step.
- If you selected a DB\_View with the intent of selecting an associated template, click the Template button .
- for the related DB\_View and follow the process described in [Adding Templates to Your Data Source](#).
- If you selected more than one data source for your report, use the DB View Relationships section to create joins between the selected data sources.

5. Select **Distinct** if you want to remove duplicates from the result set.

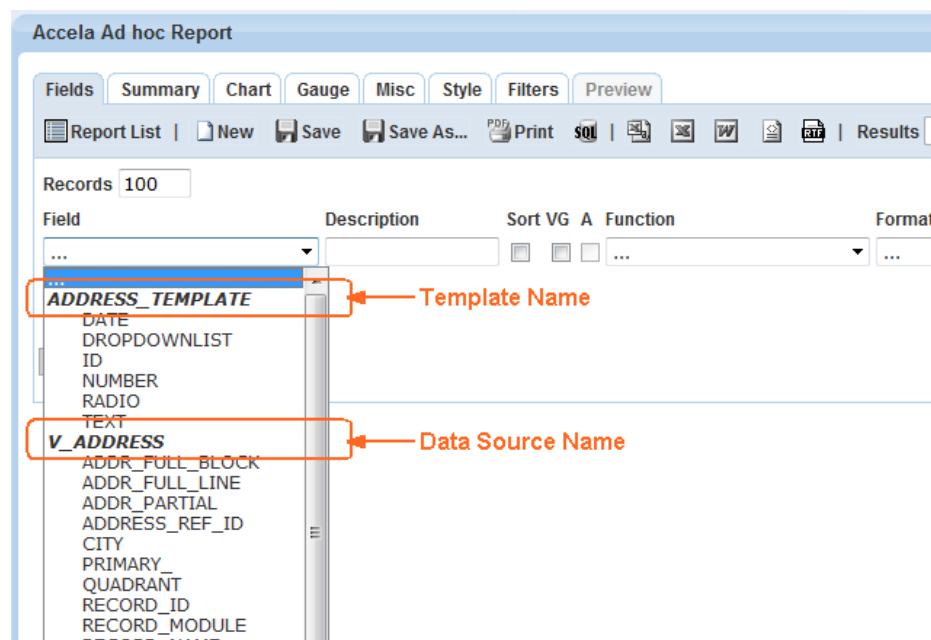


**Note:**

Marking the Distinct check box inserts the DISTINCT clause into the sql SELECT statement you are building. After you select fields in the Fields tab, you can click the SQL button to see how the DISTINCT clause appears in the SELECT statement you are creating.

6. Click **Add Fields**.

The Fields tab displays. The Field drop-down list includes the fields from the selected data source(s). If you chose more than one data source, the fields from each selected data source display beneath the data source name wherein the fields reside. If you added ASI/ ASIT templates to a data source, the template fields display separately beneath the template name.

**Note:**

The Field drop-down list excludes data source fields that ad hoc report writer does not use in the DB View Relationships, even if the data source is selected in the Data Source (Views and Tables) section.

7. From the **Field** drop-down list, select a field to add to your report.



**Note:**

Use the **Quick Add** button to display a checklist of all available fields. Go through the list and select each field you want to add to your report, then click **OK**. The ad hoc report writer adds the selected fields. You still need to set the attributes for each field (See [Fields Tab](#)).

The Description field auto-populates from the data source.

8. Define how you want the field data displayed in your report. See [Fields Tab](#) for information about field attributes.

9.

To add another field to your report, click  to insert a field above the existing row, or  to insert a field below the existing row. See the Tip in step 7 for an alternate method for adding fields.

10. Repeat steps 7 and 8 for each new row.

11. If you want to add pivot columns to your report, click **Add Pivot** (see [Adding a Pivot Column](#)).

12. If your agency has obtained a license key to access the form layout tool, and you want to create a form layout for your report, click **Design Form** (see [Working with the Form Layout Tool](#)).

13. When you finish adding fields, click **Continue to Summary**.

14. If you want to add a Summary section to your report, configure your summary report (see [Summary Tab](#)).

15. Click **Continue to Chart**.

16. Select the type of chart you want to create. Configure your chart as described in [Chart Tab](#). See [Working with Graphs](#) for further information.

**Note:**

Use Preview to view your chart settings as needed. Use the Filters tab to define limits on the data used for your chart as needed. See [Filters Tab](#) for more information.

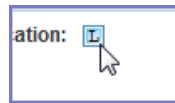
17. Click **Continue to Gauge**.

18. Configure your gauges as described in [Gauge Tab](#).

19. Click **Continue to Misc**.

20. Enter text in the **Title**, **Description**, **Header**, and **Footer** fields as needed.

21. Use the **Justification** button (see image below) for each of these elements as well as for the **Report Header Image** to define what type of justification you want to apply to the element. The choices are (L) left justification, (R) right justification, and (M) middle/center justification.



22. Define whom you want to be able to access your report, and what you want to allow them to do. See [Misc Tab](#) for details.

23. Click **Continue to Style**.

24. Use the settings on the Style tab to enhance the visual appearance of your report. See [Style Tab](#) for details.

25. Complete your report, then click **Save As** in the toolbar.

Civic Platform prompts you to name a report and category (optional).

 A dialog box titled "Input report name". It contains a text input field for the report name, a dropdown menu for the category, and two buttons labeled "OK" and "Cancel".

26. Enter a name for your report where indicated.

27. If you want to store the report in a category, select an existing category name from the drop-down list or choose **Create New** to enter a new category name.

28. Click **OK**.


Civic Platform saves your new report.

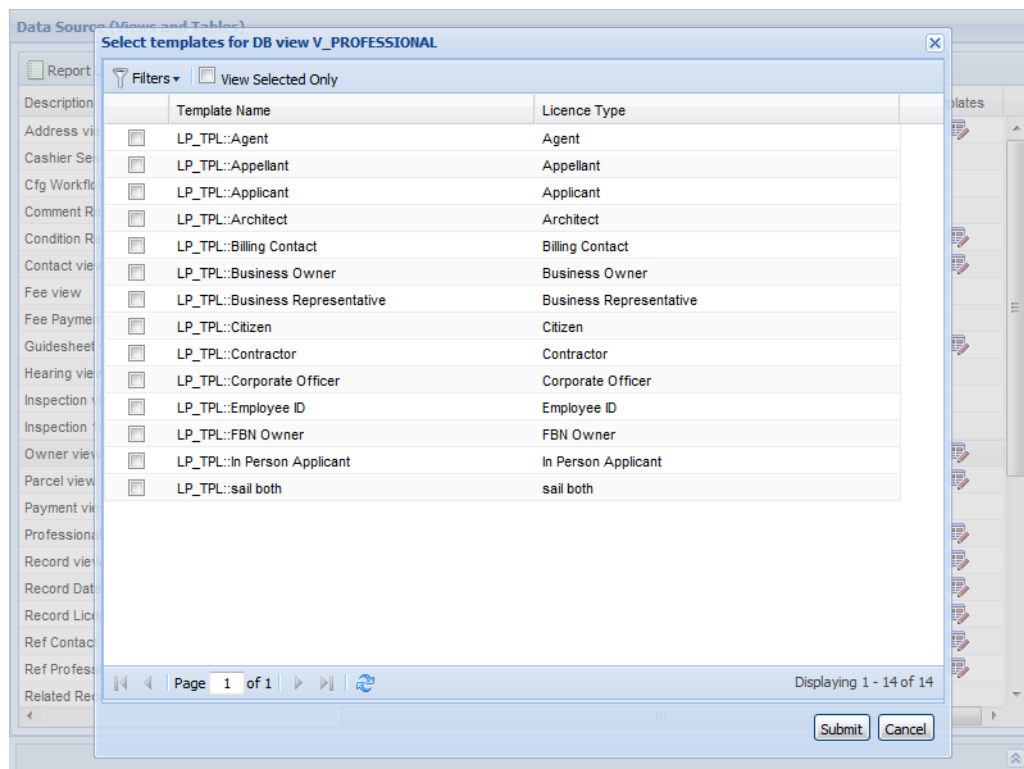
## Adding Templates to Your Data Source

If a data source has pre-defined templates, you can choose one or more of those templates to include in your data source for reporting. Your agency administrator may define one or more templates for a data source. Each template contains a series of additional information fields on records, workflow tasks, addresses, parcels, owners, conditions, licensed professionals, or contacts. For example, your administrator may define a group of application-specific information fields (ASI) for each record type. Civic Platform lists the ASI and ASIT groups associated with all record types in the template selection window. Civic Platform lists them as templates for the "V\_Record" data source.

For more information about which data sources have pre-defined templates and what those templates are, see [Data Source Templates for Ad Hoc Reporting](#).

### To add templates to your data source

1. In the Ad hoc Report portlet, open the Data Sources page either by creating a new report (see [Designing a New Report](#)) or by opening an existing report and clicking the **Data Source** button. The Data Source (Views and Tables) page displays.
2. Click the **Template** button  for the DB\_View associated with the template that you want to use for reporting. The template selection window appears.



3. If needed, click **Filter** and enter filter criteria to refine the list of displayed templates.



#### Note:

Available filter fields vary by data source. For example, you can filter templates for the data source "V\_Addresses" by template name and filter templates for "V\_CONDITION\_RECORD" by template name, condition group, and condition type.

The template selection updates to display only those templates meeting your filter criteria.

4. Select each template that you want to use.
5. Click **Submit**.

Table 89: Data Source Templates for Ad Hoc Reporting

Template Category	What Makes Up the Template Name	Description
<b>ASI(application-specific information fields)</b>	<i>ASIT::ASIT Group Code::ASIT Subgroup Code</i>	Civic Platform lists the ASI groups associated with each record type as templates for these data sources: V_RECORD_LICENSE, V_RECORD_DATES_STAFF, V_RECORD.
<b>ASIT (application-specific information tables)</b>	<i>ASIT::ASIT Group Code::ASIT Subgroup Code</i>	Civic Platform lists the ASIT groups associated with each record type as templates for these data sources: V_RECORD_LICENSE, V_RECORD_DATES_STAFF, V_RECORD.
<b>TSI(task-specific information fields)</b>	<i>TSI::TSI Group Code</i>	Civic Platform lists all TSI groups as templates for this data source: V_WORKFLOW.
<b>Address Template</b>	<i>Address Template Name</i>	Civic Platform lists all APO templates of the "ADDRESS" attribute type as templates for this data source: V_ADDRESS.
<b>Parcel Template</b>	<i>Parcel Template Name</i>	Civic Platform lists all APO templates of the "PARCEL" attribute type as templates for this data source: V_PARCEL.
<b>Owner Template</b>	<i>Owner Template Name</i>	Civic Platform lists all APO templates of the "OWNER" attribute type as templates for this data source: V_OWNER.
<b>Checklist Template</b>	<i>GUIDESHEET_TPL::ASI Group Code</i>	You can associate a checklist item with an ASI group. Civic Platform lists the ASI groups associated with each checklist item as templates for this data source: V_GUIDESHEET.
<b>Reference Contact Template</b>	<i>PEOPLE_REF::Contact Type</i>	Civic Platform lists the people templates defined for each reference contact type as templates for this data source: V_REF_CONTACT.
<b>Record Contact Template</b>	<i>PEOPLE_DALIY::Contact Type</i>	Civic Platform lists the people templates defined for each record contact type as templates for this data source: V_CONTACT.
<b>Record Condition Template</b>	<i>RECORD_COND_TPL::ASI Group Code</i>	Civic Platform lists the ASI groups associated with each type of record conditions as templates for this data source: V_CONDITION_RECORD.
<b>Standard Condition Template</b>	<i>STD_COND_TPL::ASI Group Code</i>	Civic Platform lists the ASI groups associated with each type of standard conditions as templates for this data source: V_STANDARD_CONDITION.
<b>Record Licensed Professional Template</b>	<i>LP_TPL::License Type</i>	You can associate a licensed professional with a record. Civic Platform lists the people templates defined for each type of record-related licensed professionals as templates for this data source: V_PROFESSIONAL.
<b>Reference Licensed Professional Template</b>	<i>LP_REF_TPL::License Type</i>	Civic Platform lists the people templates defined for each reference licensed professional type as templates for this data source: V_REF_PROFESSIONAL.

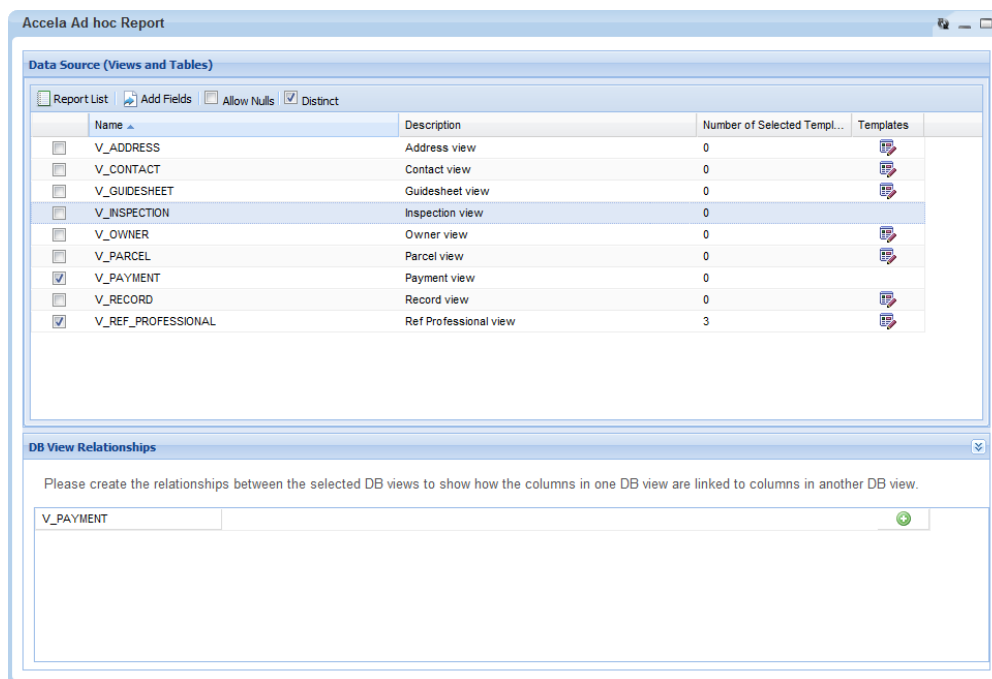
You can use more than one data source for a report. When you select multiple data sources, you need to define the relationship (join) between the data sources in the DB View Relationships section at the bottom of the Data Source (Views and Tables) page. In most cases, users do this by identifying a common column (field) on both tables that helps tie the two tables together and then they specify the type of join between the tables.

### To specify multiple data sources for your report

1. In the Ad hoc Report portlet, open the Data Sources page either by creating a new report (see [Designing a New Report](#)) or by opening an existing report and clicking the **Data Source** button. The Data Source (Views and Tables) page displays.

2. Select each data source that you want to use in your report.

The DB View Relationships section automatically expands when you select more than one data source.



3. From the first row of the DB View Relationships list, select the first data source from the drop-down list.

4. Click the **Insert Row** button on the right side of the window. Civic Platform inserts a new row.

5. Complete the new row as follows:

- First cell** Select the second data source.
- Second cell** Select a column in the second data source that can be mapped to a column in the first data source.
- Third cell** Read-only. This field contains the operator “=”
- Fourth cell** Select the first data source.
- Fifth cell** Select a column in the first data source to map to the column you selected for the second cell.



**Sixth cell**

Select the type of join you want to create. The following join types are available:

**Inner (Direct) Join:** An inner join selects rows from two tables such that the value in a column for the first table also appears in a column for the second table.


**Cross Join:** A cross join returns a result table where each row from the first table combines with each row from the second table.

**Left (First Exists) Join:** A left join (left outer join) returns all rows from the left table in the left outer join clause, whether the joined columns have a match or not. A field in a result row displays a null if the corresponding table does not contain a matching row.

**Right Join:** A right join (right outer join) returns all rows from the right table in the right outer join clause, whether the joined columns match or not. A field in a result row displays a null if the corresponding table does not contain a matching row.

**Full Join:** A full join (full outer join) returns all rows from both the right outer and left outer joins. A field in a result row displays a null if the corresponding table does not contain a matching row.

The Ad Hoc Report tool creates the desired join between the selected data sources.

- To create another join between the same data sources, or between the one of the previously joined data sources and a third data source, click the  **Insert Row** button to insert a new data source row, then repeat step 5.

**Note:**

The fourth cell on a new row is a drop-down list containing the data sources that you selected in the first cells of all the previous rows and the new row.

## Visually Grouping by Field Value

You can group data rows by field in your report, using field values as subheadings for each group.

**Example**

You can create a payment report that lists the Payment Method (where check, credit card, and cash are the options), the Payment Amount, and the Payment Date.

If you leave VG blank for all fields, your report displays a single table with 3 rows of data as shown.

PAYMENT METHOD	AMOUNT	DATE PAYMENT
Credit	\$2,500.00	1/11/2006
Credit	\$2.00	9/2/2007
Credit	\$10.00	2/22/2008
Credit	\$35.00	5/27/2008
Credit	\$45.00	5/27/2008
Credit	\$40.00	7/20/2008
Check	\$410.00	6/3/2007
Check	\$10.00	6/12/2007
Check	(\$1.00)	9/2/2007
Check	\$3.00	9/2/2007
Check	(\$4.00)	9/10/2007
Check	\$5.00	9/10/2007
Cash	\$100.00	7/8/2004
Cash	\$1,600.00	7/14/2004
Cash	\$450.00	12/9/2004
Cash	\$1,750.00	1/4/2005

If you mark VG for Payment Method, your report displays a series of two-column tables - one table for each Payment Method value. Civic Platform uses the Payment Method values as these sub-table headers.

Credit	
AMOUNT	DATE PAYMENT
\$2,500.00	1/11/2006
\$2.00	9/2/2007
\$10.00	2/22/2008
\$35.00	5/27/2008
\$45.00	5/27/2008
\$40.00	7/20/2008

Check	
AMOUNT	DATE PAYMENT
\$410.00	6/3/2007
\$10.00	6/12/2007
(\$1.00)	9/2/2007
\$3.00	9/2/2007
(\$4.00)	9/10/2007
\$5.00	9/10/2007

Cash	
AMOUNT	DATE PAYMENT
\$100.00	7/8/2004
\$1,600.00	7/14/2004
\$450.00	12/9/2004
\$1,750.00	1/4/2005

## Creating a Calculated Column

You can create a calculated column for your report that performs basic arithmetic operations using field values.

### To create a calculated column

We want to sum the field A value and the field B value to get a new value C ( $A+B=C$ ). In our report display, we want to display field A as the first column, field B as the second column, and the new calculated column C as the third column.



#### Note:

You do not need to display field A and field B in the report to use them in creating a calculated column.

1. Open the Ad hoc Report portlet.
2. Create a new report or edit an existing one by clicking the Design icon as shown.



The Report Designer opens.

3. Make sure you have a data source selected. See [Data Source Section](#) and [DB View Relationships Section](#).
4. Go to the Fields tab.
5. Create the first column:
  - Select Field A from the Field drop-down list.
6. Click the **Add New Row Below** button.
7. Create the second column:

- Select Field B from the Field drop-down list in the new row.

#### 8. Create the third column, which is the calculated one:

- Click the **Add New Row Below** button.
- Select Field A from the Field drop-down list.
- Type TOTAL in the Description.
- Click the **Add New Row Below** button.
- Select Field B from the Field drop-down list.
- Click the A box for the Field B row until a + displays.

Civic Platform disables the Field B Description and Format fields and uses these values from the Field A row, for column C. When you run the report, Civic Platform labels Column C with TOTAL, and displays the sum of the values in column A and column B as shown below.

Column A	Column B	TOTAL
\$0.00	\$0.00	\$0.00
\$1.00	\$1.00	\$2.00
\$2.00	\$2.00	\$4.00
\$3.00	\$3.00	\$6.00
\$8.00	\$9.00	\$17.00
\$11.00	\$11.00	\$22.00
\$31.00	\$13.00	\$44.00
\$44.00	\$44.00	\$88.00
\$114.00	\$152.00	\$266.00
\$234.00	\$44.00	\$278.00
\$102.00	\$214.00	\$316.00
\$123.00	\$213.00	\$336.00
\$111.00	\$236.00	\$347.00
\$116.00	\$252.00	\$368.00
\$133.00	\$238.00	\$371.00

## Adding a Pivot Column

The Pivot feature allows users to generate analytical data grids from within a report, essentially adding extra pivot columns to the right side of the report. Pivot columns are useful for comparing data over multiple categorical dimensions. For example, you can create a report that lists inspections by type and the number of each type for the year to date. To that, you can add pivot columns that break out the number of inspections by month, with monthly sub-totals listed.

### To add a pivot column

In this scenario, we are going to create a report that lists the number of inspections performed for the current year and visually group the data by inspection type. Then we are going to add a pivot that further breaks out the number of inspections by month for each inspection type.

1. Open the Ad hoc Report portlet.
2. Create a new report or edit an existing one by clicking the Design icon as shown.




The Report Designer opens.

- On the Data Sources tab, select the V\_INSPECTION data source.
- On the Fields tab, set the following fields as shown:

Field	Description	Sort	VG	A	Function	Format
INSPECTION_TYPE	INSPECTION TYPE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Group	...
DATE_INSPECTION	Number of Inspect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Count	...
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

The preview shows these results.



FINAL-ELECTRICAL	
Number of Inspections	1
Fireplace Spark Arrestor	
Number of Inspections	1
Inspection D	
Number of Inspections	4

- Return to the Fields tab and click **Add Pivot**.

The Add Pivot Columns controls display.

- Set the fields as shown:

Add pivot columns for	DATE_INSPECTION	using	Group(Month Name)	function
Calculate cell values on	DATE_INSPECTION	field with	Count	function and 0,000 format.
<input type="checkbox"/> Add Subtotals				
Quick Add		Remove pivot		Continue to Summary
Preview				

The preview shows these results.

FINAL-ELECTRICAL				
Number of Inspections	Feb	Mar	Jul	
1	0	1	0	
Fireplace Spark Arrestor				
Number of Inspections	Feb	Mar	Jul	
1	0	0	1	
Inspection D				
Number of Inspections	Feb	Mar	Jul	
4	2	2	0	

## Designing a New Dashboard

A dashboard is a convenience that enables you to set up a display that shows multiple report sections, such as a chart, a summary, or a list of fields, on a single page. For example, the manager of a city's building permits department may create a dashboard view that displays updated graphs that allow him to monitor the number of scheduled vs. completed inspections, the types/quantities of permits being requested, and fee payment data. He can check this dashboard to get an up-to-date snapshot of his department's activities without having to go in and run each report separately.



### Note:

Dashboards make use of existing reports. Create your reports first, then create your dashboard.

### To design a new dashboard

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).

The Ad hoc Report portlet opens and displays the Report List.

2. Click **Design a New Dashboard**.

The Ad hoc Dashboard Designer displays.

3. In the first set of report selection fields, complete the following fields:

<b>Title</b>	Enter the title for the report.
<b>Report</b>	From the drop-down list of existing reports, select the report you want to add to your dashboard display.
<b>Records</b>	From the drop-down list, select the number of records to show.
<b>Report Part</b>	Select which part of the selected report you want to display in your dashboard. Choices may include Chart, Gauges, Summary, or Detail, depending on which parts are available in the source report.

4. Repeat the previous step for each new report you want to add to your dashboard. You can add up to 11 reports.

5. Set the permissions for your dashboard by selecting values from the Share With and Rights drop-down lists. The Share With field defines who can access your dashboard. The Rights field defines what other users can do with your dashboard.
6. Use Preview to see how your dashboard looks. To return to the Dashboard Designer, click the Design button.
7. When you finish, click **Save As**, enter a name for your dashboard, and select a category in which to store the dashboard.
8. Click **OK**.

## Working with Graphs

Using tools on the Charts tab, you can create the following types of charts to illustrate data trends, compare values, or show a progression.

- [Trend Charts](#)
- [Pie Charts](#)
- [Plot Charts](#)
- [Bar Charts](#)
- [Funnel Charts](#)

### Trend Charts

Use a trend chart when you want to view the pattern of change in a data element over a period of time.

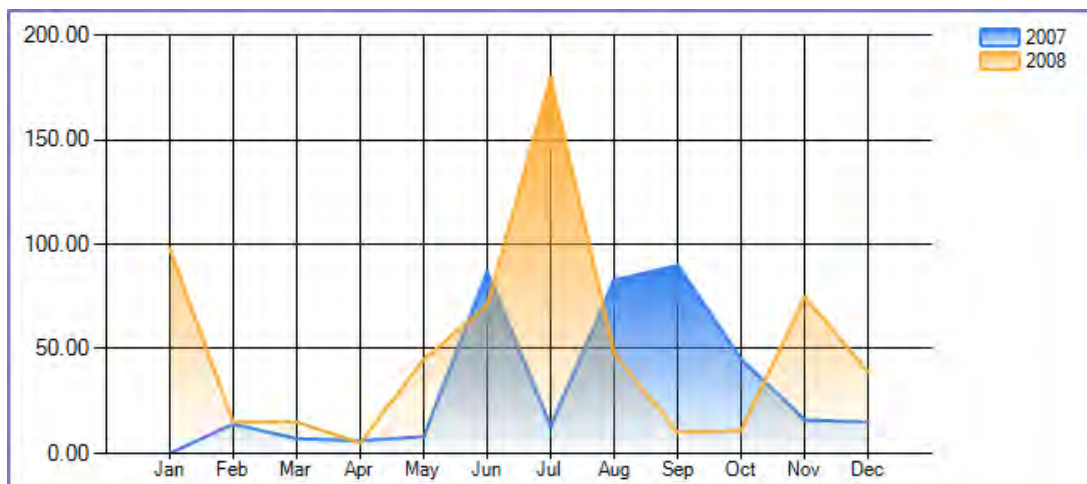


Figure 26: Trend Chart Example

#### To create a trend chart

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)) and either click the Edit icon for an existing report, or click **Design a New Report**.
2. If you are designing a new report, select one or more data sources. See [Data Source Section](#) and [DB View Relationships Section](#).
3. Go to the Charts tab.
4. From the **Chart Type** drop-down list, select **Trend**.
5. Enter a title for the chart in the **Title** field.
6. Select the date field you want to use for measuring progress on the x-axis.
7. Select an option from the **Function** drop-down list to apply to the date field. For example, choose **Group(Month Name)** to display data by month.

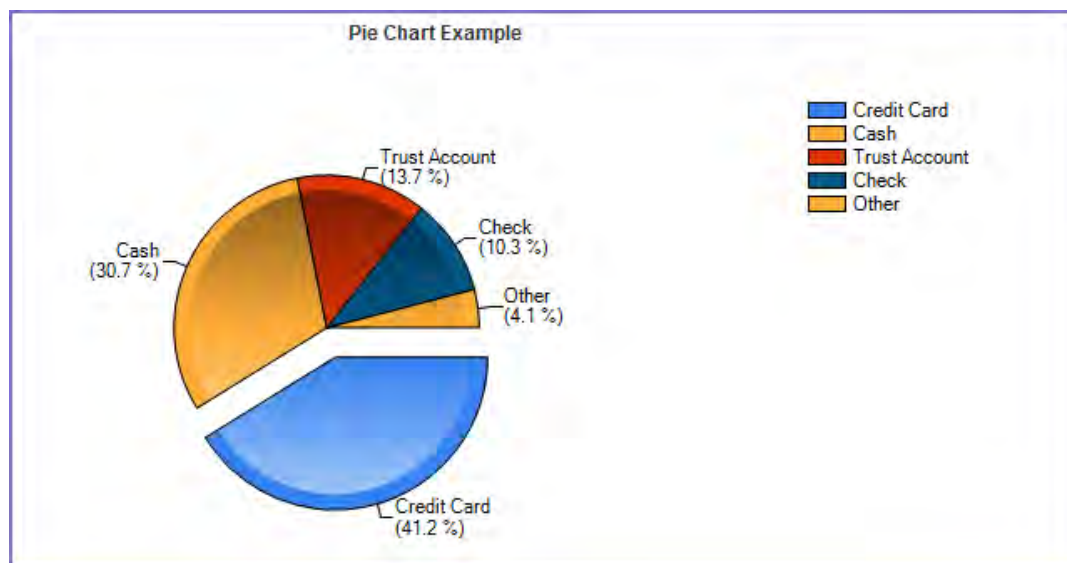
**Note:**

The Function options can impact your x-axis unit labels. For example, if you choose Group(Month), the x-axis labels display numerical values representing the months of the year (1 for January, 2 for February, and so forth). If you choose Group(Month Name), the x-axis labels display the abbreviated names of the month (Jan for January, Feb for February, and so forth).

8. Select **Sort** to sort the values chronologically. If you do not check this box, the field labels may not appear as you expect them to.
9. From the **Value** drop-down list, select the field you want to use for the y-axis. Your selection is the value you want to track over time. For example, if you want to track the amount of payments received over time, you can choose the **Amount** field.
10. Select an option from the **Function** drop-down list to apply to the Value you just selected. For example, you can choose **Sum** to sum the data for the Value field for each period of time defined by the Date function.
11. Optional: Click **Advanced Properties** to see additional chart settings.
12. Complete additional chart attributes as described in [Trend Chart Fields and Settings](#).
13. Either save your work, or click **Continue to Gauge**.

**Pie Charts**

Use a pie chart when you are comparing parts of a whole. The circle represents the “whole,” whereas each ‘slice’ of the pie corresponds to a percentage of the whole that each part of the whole represents.



**Figure 27: Pie Chart Example**

**To create a pie chart**

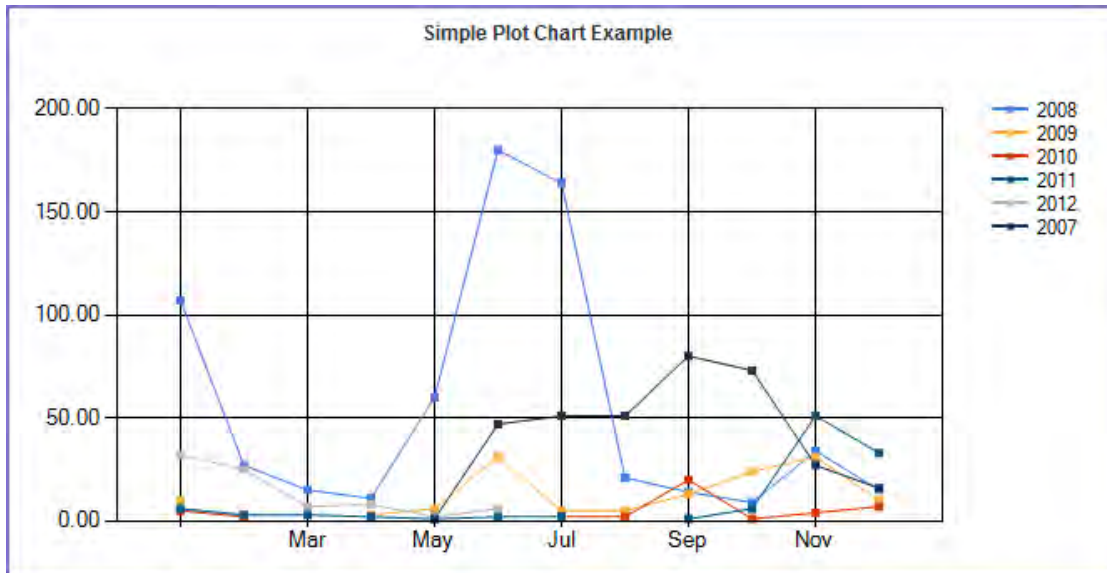
1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)), and either click the Edit icon for an existing report, or click **Design a New Report**.
2. If you are designing a new report, select one or more data sources. See [Data Source Section and DB View Relationships Section](#).
3. Go to the Charts tab.



4. From the **Chart Type** drop-down list, select **Pie**.
5. Enter a title for the chart in the **Title** field.
6. Enter a number in the **Records** field to limit how many records you want to use to create the chart.
7. Select a field from the **Label** drop-down list. Civic Platform uses the values from this field to define the different portions of the pie chart.  
For example, you want to create a pie chart that shows the percentage of total payments for each of five payment methods. You can use Payment\_Method as the label.
8. Select an option from the **Function** drop-down list to apply to the Label field (for example, Group).
9. Select a field from the **Value** drop-down list.  
For example, you want to measure the percentage of total payments for each of five payment methods. You can use Amount as the Value.
10. Select an option from the **Function** drop-down list to apply to the Value field (for example, Sum).
11. Optional: Click **Advanced Properties** to see additional chart settings.
12. Complete additional chart attributes as described in [Pie Chart Fields and Settings](#).
13. Either save your work, or click **Continue to Gauge**.

### Plot Charts

Use a plot chart when you are tracking changes over a long or short period of time. It is common to apply a date or time value to the x-axis, and a secondary value, such as number of inspections per day, to the y-axis.



**Figure 28: Plot Chart Example**

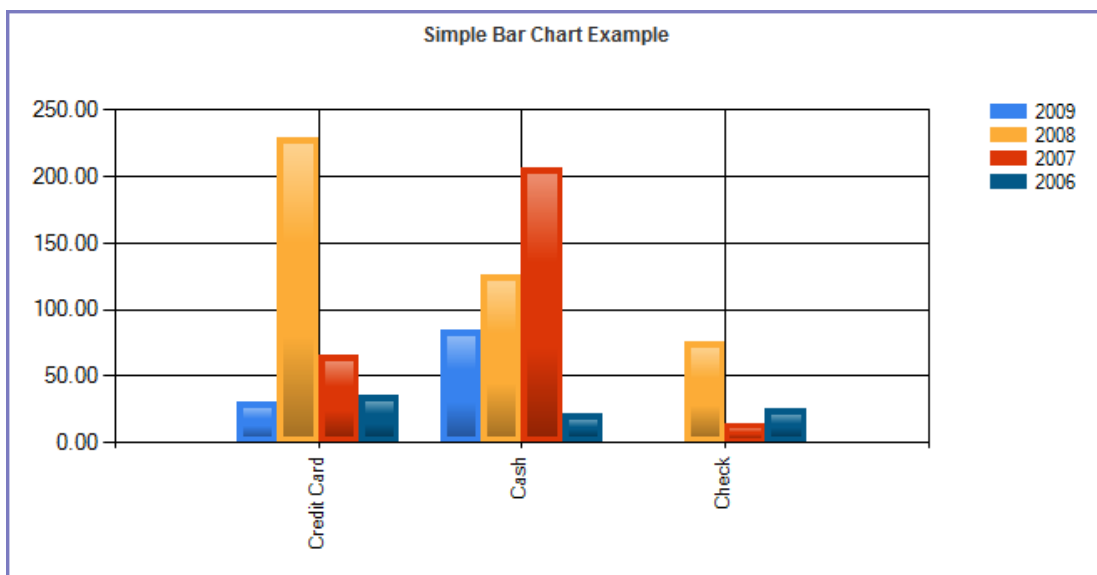
### To create a plot chart

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)), and either click the Edit icon for an existing report, or click **Design a New Report**.
2. If you are designing a new report, select one or more data sources. See [Data Source Section](#) and [DB View Relationships Section](#).

3. Go to the Charts tab.
4. From the **Chart Type** drop-down list, select **Plot**.
5. Enter a title for the chart in the **Title** field.
6. Enter a number in the **Records** field to limit how many records you want to use to create the chart.
7. Choose a field to use for the x-axis values. Users often choose a date field.
8. From the drop-down list, choose a function to apply to the field you just selected (for example, Group).
9. Choose a field to use for the y-axis values.
10. From the drop-down list, choose a function to apply to the field you just selected (for example, Sum).
11. Optional: Click **Advanced Properties** to see additional chart settings.
12. Complete additional chart attributes as described in [Plot Chart Fields and Settings](#).
13. Either save your work, or click **Continue to Gauge**.

## Bar Charts

Use a bar chart when you want to compare data between different groups or you want to track changes in data over time.



**Figure 29: Bar Chart Example**

### To create a bar chart

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)), and either click the Edit icon for an existing report, or click **Design a New Report**.
2. If you are designing a new report, select one or more data sources. See [Data Source Section and DB View Relationships Section](#).
3. Go to the Charts tab.
4. From the **Chart Type** drop-down list, select **Bar**.

5. Enter a title for the chart in the **Title** field.
6. Enter a number in the **Records** field to limit how many records you want to use to create the chart.
7. From the Label drop-down list, choose a field to use for the x-axis values. Users often choose a date field.
8. Choose a function to apply to the field you just selected (for example, Group(Month)).
9. From the Value drop-down list, choose a field to use for the y-axis values.
10. Choose a function to apply to the field you just selected (for example, Sum).
11. Optional: Click **Advanced Properties** to see additional chart settings.
12. Complete additional chart attributes as described in [Bar Chart Fields and Settings](#).
13. Either save your work, or click **Continue to Gauge**.

## Funnel Charts

Use a funnel chart to illustrate a sales analysis of potential revenue over a series of stages.

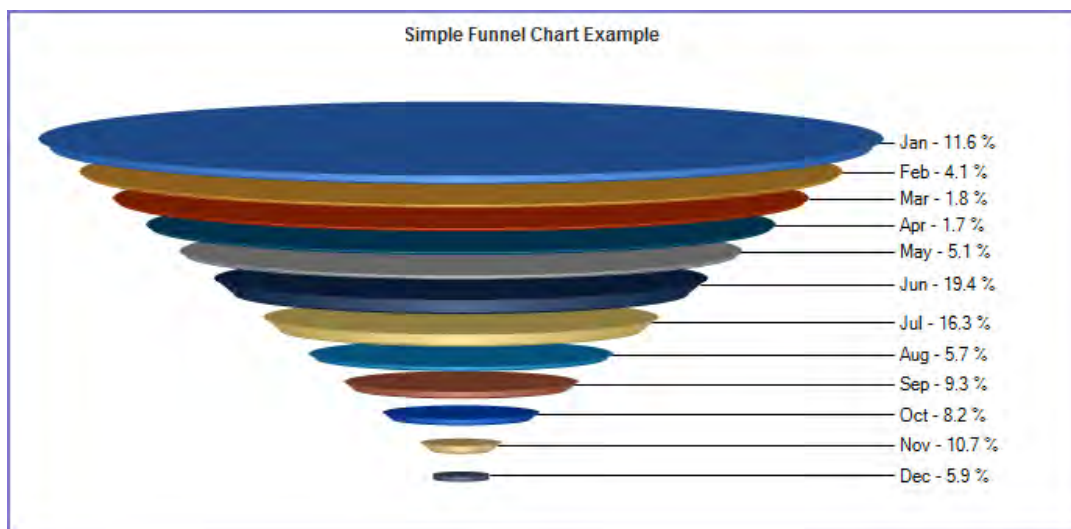


Figure 30: Funnel Chart Example

### To create a funnel chart

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)), and either click the Edit icon for an existing report, or click **Design a New Report**.
2. If you are designing a new report, select one or more data sources. See [Data Source Section and DB View Relationships Section](#).
3. Go to the Charts tab.
4. From the **Chart Type** drop-down list, select **Funnel**.
5. Enter a title for the chart in the **Title** field.
6. Enter a number in the **Records** field to limit how many records you want to use to create the chart.

7. From the **Label** drop-down list, choose a field to use for the x-axis values. Users often choose a date field.
8. Choose a function to apply to the field you just selected (for example, Group(Month)).
9. From the **Value** drop-down list, choose a field to use for the y-axis values.
10. Choose a function to apply to the field you just selected (for example, Sum).
11. Optional: Click **Advanced Properties** to see additional chart settings.
12. Complete additional chart attributes as described in [Funnel Chart Fields and Settings](#).
13. Either save your work, or click **Continue to Gauge**.

## Working with Categories

### Topics

- [Creating a New Category](#)
- [Copying a Report to Another Category](#)
- [Deleting a Category](#)

### Creating a New Category

Before you create new categories, be aware that renaming and deleting categories is currently not supported. Once you create a category, it is part of your ad hoc report list display. A good strategy may be to pre-plan your report categories. Another strategy might involve report categories specific to users (for example, 'Tom's Reports' or 'Manager Reports').

#### To create a new category

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Either create a new report/dashboard, or open the design form for an existing report/dashboard that you want to assign to the new category.
3. Click **Save As**.

Civic Platform prompts you to input a report name and select a category to which to assign the report.

4. From the **Category** drop-down list, choose **(Create new)**.

Civic Platform prompts you to enter a category name.

5. Enter a category name. You may use spaces, capitalization, and hyphens. Avoid other special characters.
6. Click **OK**.

You are returned to the Input Report Name dialog with the new category name displayed in the **Category** field.

7. Click **OK**.

Civic Platform prompts saves the report name and new category, and the new category is now appears in the Category drop-down list for naming/assigning reports and dashboards.

## Copying a Report to Another Category

You can copy a report from one category to another as needed. The process for doing so is very similar to the process for creating a new category, except that you can either create a new category or select an existing category from the Category drop-down list.

See [Creating a New Category](#).

### To copy a report to another category

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Open the design form for an existing report/dashboard that you want to copy by clicking the **Design** button to the left of the desired report. Note that the **Delete** and **Design** buttons for a report become visible when you hover your mouse cursor on the report name.



3. Click **Save As**.  
Civic Platform displays the current report name and category.
4. From the **Category** drop-down list, choose either another existing category or **(Create new)**.
5. If you chose **Create new**, enter a category name and click **OK**. Otherwise, skip this step.  
Civic Platform displays the Input Report Name dialog with the new category name showing in the **Category** field.
6. Click **OK**.  
Civic Platform copies the report to the new category.

## Deleting a Category

Remove unwanted categories by emptying them of contents. If you have a category you do not want, do the following:

1. If you want to save any of the reports or dashboards in the category you are removing to another category, copy them to the new categories now. See [Copying a Report to Another Category](#).
2. Delete each report and dashboard within the category you want to remove. See [Deleting an Existing Report](#).

When you remove the last report/dashboard from the category, Civic Platform removes the category as well.



#### Note:

You may need to refresh your browser or clear your browser cache to make the empty category disappear from your Report List view.

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## Working with the Form Layout Tool

---

You can use the form layout tool in ad hoc reports to design and create forms that you can populate with Civic Platform data, resulting in customized document output.

For example, you can create an invoice form that populates with data from the database. When you run the report, Civic Platform creates a separate, customized invoice for each record included in the report.



**Note:**

Agencies must obtain a license key to access the form layout tool.

---

### Topics

- [Creating a New Form](#)
- [Creating a New Form Using Existing HTML Code](#)
- [Adding a Table to a Form](#)
- [Adding Fields to a Form](#)
- [Adding Graphical Elements to a Form](#)
- [Adding a Hyperlink to a Form](#)
- [Adding a Bookmark and Linking to It](#)

### Related Information

- [Izenda Report Design Guide > Izenda Forms](#)

## Creating a New Form

Novice and expert users alike can use the form layout tool to create letters and forms. You can create letters and forms from scratch as described below, or you can copy the html code from an existing letter or form and paste it into the form layout tool, where you can add fields (see [Creating a New Form Using Existing HTML Code](#)).

**BEST PRACTICES TIP:** If your letter or form does not already exist, take a few minutes to plan the letter/form contents before you begin working in the form layout tool. Identify the graphics you need, any hyperlinks you want to create, and what database fields you want to use in the form. Write a list of the database fields you want to use, so you can be confident that you are spelling the field names correctly when you insert them into your form.



**Note:**

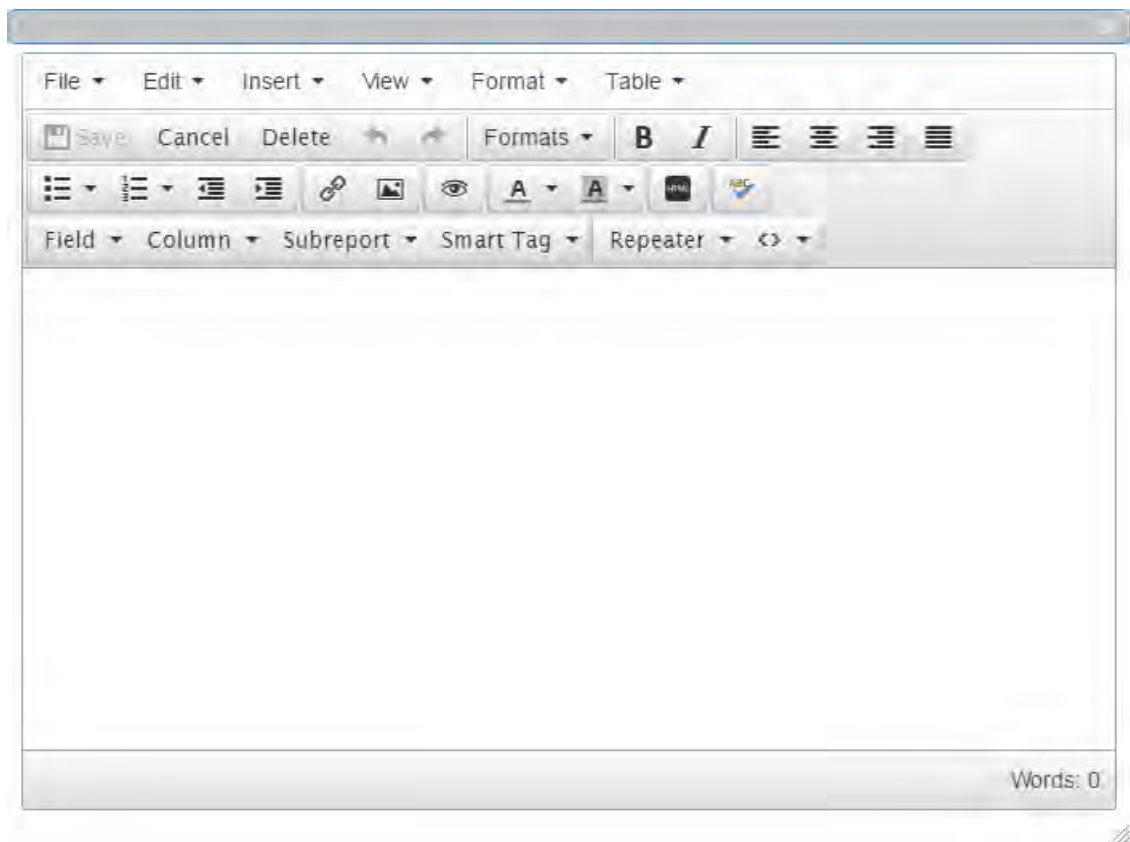
Work with the Display Document Structure button  enabled to better see how your form layout is proceeding.

---

### To create a form or letter

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Select the database source for your report
3. Go to the Fields tab.
4. Select the fields you want to use in your form.

5. Write down the field names exactly as they appear. You will need this information later.
6. Click the **Design Form** button.  
The form layout tool displays.



7. Enter all text content that you intend to be common to each form that runs. For example, you can enter a title to a form, or the body of a form letter. Do not format the text yet.
8. If you want any information or data in your form/letter to appear in columns, create a table and use the columns in the table to organize your data (see [Adding a Table to a Form](#)).



**Note:**

You can use tables to control your form layout as well. For example, your form might be on letterhead, with a header title and your agency's logo in the same horizontal space on your form. You can create a 2-column table without lines and put the logo in one table cell, and the header content in the other cell.

9. Using the list of fields you wrote down in step 4, enter each field you want to include in your form in the location where you want it to appear. Enclose each field name in square brackets. Example: **[record\_id]**. (see [Adding Fields to a Form](#)).
10. Insert horizontal lines, graphics, and page breaks as needed (see [Adding Graphical Elements to a Form](#)).
11. Format the text as you want it to appear. For example, apply a new font style and size to your header.
12. Click **OK** when you are done.  
Civic Platform closes the form layout tool and then returns you to the Fields tab.

You can proceed with report setup as described in [Designing a New Report](#).



## Creating a New Form Using Existing HTML Code

You have the ability to create new forms by copying the HTML code from an existing letter or form and pasting it into the form layout tool, where you modify the contents as needed.

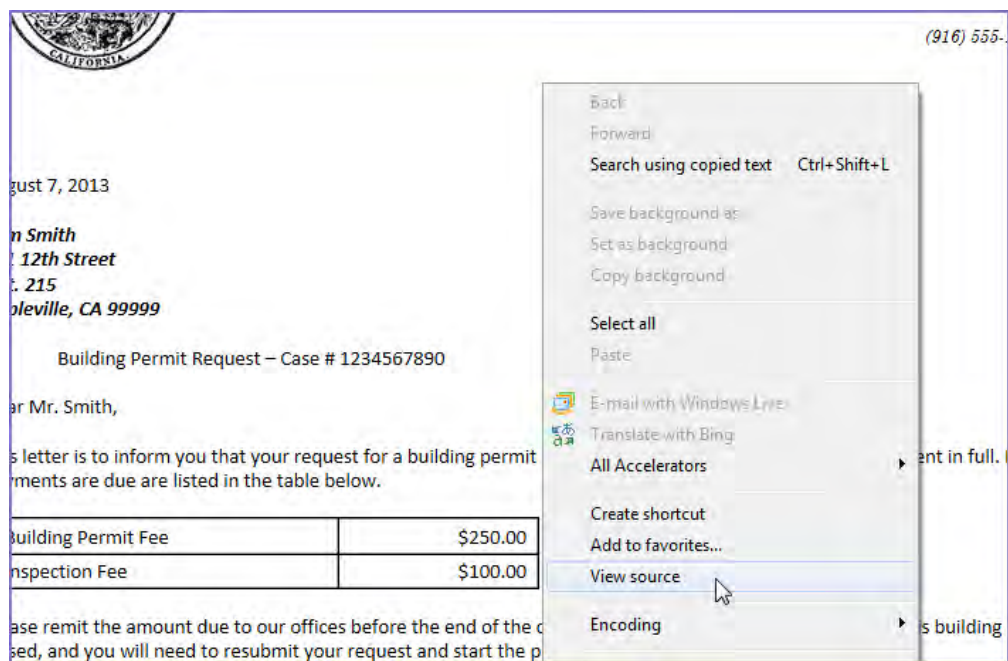


### Note:

Work with the Display Document Structure button  enabled to better see how your form layout is proceeding.

### To create a form or letter using existing HTML code

1. Open the ad hoc report writer portlet (see [Launching the Ad Hoc Report Writer](#)).
2. Select the database source for your report
3. Go to the Fields tab.
4. Select the fields you want to use in your form.
5. Write down the field names exactly as they appear. You will need this information later.
6. Locate the source document you want to copy, such as a XML or HTML file.
7. Double-click the file to open it in your browser.
8. Right-click in the page display.  
A command menu displays.



9. Select **View Source**.

The source code for the page displays.

```

1 <html xmlns:v="urn:schemas-microsoft-com:vml"
2 xmlns:o="urn:schemas-microsoft-com:office:office"
3 xmlns:w="urn:schemas-microsoft-com:office:word"
4 xmlns:x="urn:schemas-microsoft-com:office:excel"
5 xmlns:m="http://schemas.microsoft.com/office/2004/12/omml"
6 xmlns="http://www.w3.org/TR/REC-html40"
7
8 <head>
9 <meta http-equiv=Content-Type content="text/html; charset=windows-1252">
10 <meta name=ProgId content=Word.Document>
11 <meta name=Generator content="Microsoft Word 14">
12 <meta name=Originator content="Microsoft Word 14">
13 <link rel=File-List href="SAMPLE%20BUSINESS%20LETTER_files/filelist.xml">
14 <link rel=Edit-Time-Data href="SAMPLE%20BUSINESS%20LETTER_files/editdata.mso">
15 <!--[if !mso]>
16 <style>
17 v\:.* {behavior:url(#default#VML);}
18 o\:.* {behavior:url(#default#VML);}
19 w\:.* {behavior:url(#default#VML);}
20 .shape {behavior:url(#default#VML);}
21 </style>
22 <![endif]--><!--[if gte mso 9]><xml>
23 <o:DocumentProperties>
24 <o:Author>Jody Kemp</o:Author>
25 <o:LastAuthor>Jody Kemp</o:LastAuthor>
26 <o:Revision>2</o:Revision>
27 <o:TotalTime>23</o:TotalTime>
28 <o:Created>2013-08-07T17:49:00Z</o:Created>
29 <o:LastSaved>2013-08-07T17:49:00Z</o:LastSaved>
30 <o:Pages>1</o:Pages>
31 <o:Words>164</o:Words>
32 <o:Characters>936</o:Characters>
33 <o:Lines>7</o:Lines>
34 <o:Paragraphs>2</o:Paragraphs>
35 <o:CharactersWithSpaces>1098</o:CharactersWithSpaces>
36 <o:Version>14.00</o:Version>
37 </o:DocumentProperties>
38 <o:OfficeDocumentSettings>
39 <o:AllowPNG/>
40 </o:OfficeDocumentSettings>
41 </xml><![endif]-->
42 <link rel=themeData href="SAMPLE%20BUSINESS%20LETTER_files/themedata.thmx">

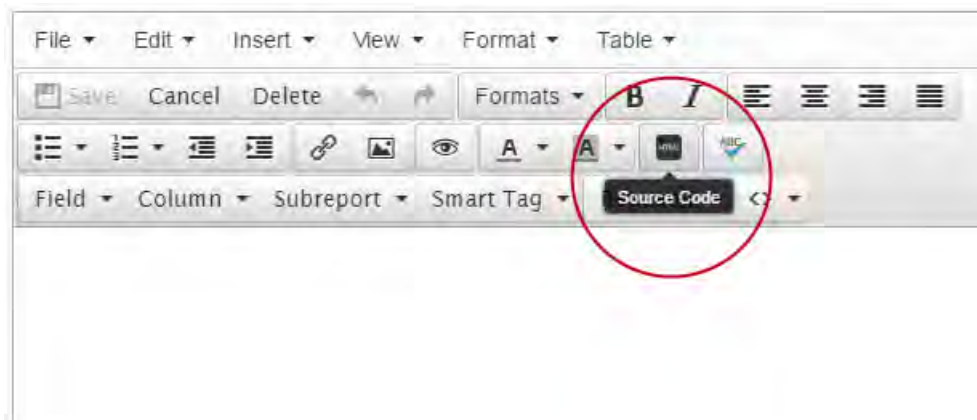
```

10. Click within the window, then press **Ctrl+A** to select all of the contents of the window.

11. Press **Ctrl+C** to copy the contents to the clipboard.

12. Navigate to the ad hoc reports form layout tool, and click **Design Form**.

13. Click the **HTML Source Code** button.



14. On the **Source Code** window, press **Ctrl+V** to paste the contents of your clipboard to the form layout tool.

15. Click **Insert and Close** button on the Source Code window to view the content in WYSIWYG format.

16. Using the list of fields you wrote down in step 4, enter each field you want to include in your form in the location where you want it to appear. Enclose each field name in square brackets. Example: **[record\_id]** (see [Adding Fields to a Form](#)).

17. Insert horizontal lines, graphics, and page breaks as needed. (see [Adding Graphical Elements to a Form](#)).



**Note:**

To have each instance of your form appear on a separate page, use the Page Break button to insert a break at the bottom of your form. For example, you have an invoice form, and you want each invoice that Civic Platform creates when you run the report to be on a separate page.

18. Edit the form content as needed to make it appear the way you want it.

19. Click **OK** when you are done.

Civic Platform closes the form layout tool and then returns you to the Fields tab.

For more information about designing report forms, see the [Izenda Report Design Guide > Izenda Forms](#). You can proceed with report setup as described in [Designing a New Report](#).

## Adding a Table to a Form

You can use tables in a form to display data in a columnar format. You can also use tables to regulate where on a page that you want form elements to appear. For example, if you want to create letterhead for a letter that includes your agency logo on the left and your agency name and address on the right, you can use a table to align these elements side by side.

You can add a table to a form in the form layout tool with the click of a button. Use the table editing buttons to modify your table as needed.

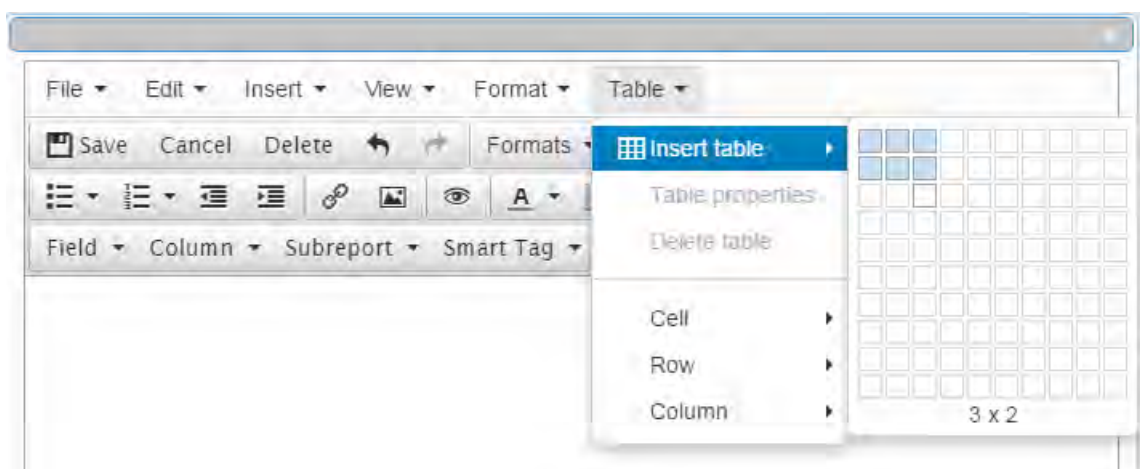


**Note:**

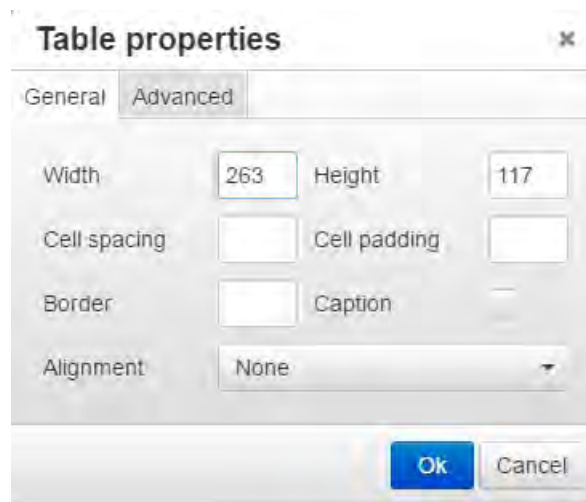
Work with the Display Document Structure button  enabled to better see how your table appears. This is especially useful if you do not define borders for your table.

### To add a table to a form

1. With the form layout tool open, position your cursor where you want to place the table.
2. From the **Table** menu, select **Insert table** and choose the number of rows and columns.



3. To see the table properties, select the table on the form designer, and select **Table > Table properties**.



## Adding Fields to a Form

You can add field markers to your form that tell Civic Platform which data elements to use in your form. When you run your report, Civic Platform replaces those field markers with data from the fields you indicated, creating custom letters and completed forms. For example, you can create a form letter and insert field markers for the contact's name and address. When you run the report, Civic Platform populates those markers with the name and address of each record it uses in the run. Your output is a series of form letters; each letter has the form letter content, but different names and addresses.

Field markers are easy to create. Simply enter the name of the database field you want to use, enclosed in square brackets. For example, to create a marker for the record\_ID field, enter [record\_ID] in the form layout tool. It is good practice to write down the list of fields you want to use while you are in the Fields tab. Doing so gives you the opportunity to double check the field name spelling and syntax.

You can use tables to regulate where on a page that you want field markers to appear. For example, you can create columns and place field markers in the cells so that the data aligns when you run the report (see [Adding a Table to a Form](#)).

### To add field markers

1. On the Fields tab for your report, select the fields you want to use in your form (see [Designing a New Report](#)).
2. As you select fields, write down the names of the fields. You may find that the written list is handy when you are working in the form layout tool.
3. Click the **Design Form** button.  
The form layout tool displays.
4. Position your cursor where you want to place the field.
5. Enter the name of the field you want to place, enclosed in square brackets. For example, to create a marker for the record\_ID field, enter [record\_ID] in the form layout tool.
6. Apply font styles and formatting as needed.

## Adding Graphical Elements to a Form

You can enhance your form's appearance by inserting graphics, such as an agency logo, or by inserting horizontal rules (lines) as needed.

### Topics

- [Adding a Horizontal Rule](#)
- [Inserting a Graphic](#)

## Adding a Horizontal Rule

You can add a horizontal rule (line) to your form when you want to visibly distinguish one section of your form from another.

1. With the form layout tool open, position your cursor where you want to insert the line.
2. From the **Insert** menu, select **Horizontal line**.  
Civic Platform places the horizontal rule (line) as defined.

## Inserting a Graphic

1. With the form layout tool open, position your cursor where you want to place the graphic.
2. From the **Insert** menu, select **Insert image**.

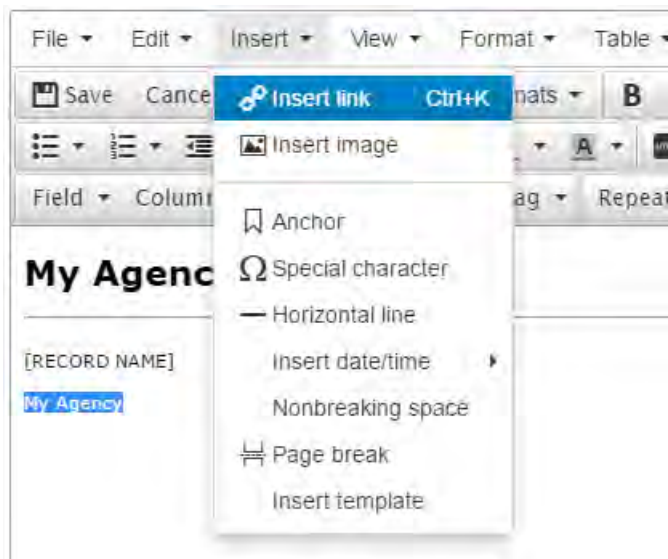
3. In the Source field, enter the location and name of the graphic you want to insert. You can use a URL address or a file directory address (for example, c:\graphics\agency\_seal.jpg).
4. If you are an experienced HTML coder, you can enter HTML code in the Source code window.

## Adding a Hyperlink to a Form

You can create hyperlinks in your forms as needed. When your report runs, the hyperlinks you created provide readers of the electronic report with a link to a URL you specify. For example, you can insert a hyperlink that customers can click to access your agency's website.

### To add a hyperlink to a form

1. With the form layout tool open, position your cursor where you want to create the hyperlink.
2. Enter the text that you want to use as the base for your hyperlink. For example, if you want to create a hyperlink to your agency's website, you can enter your agency's name.



3. Highlight the text that you want to use for your hyperlink.

4. From the **Insert** menu, select **Insert link**.

The Insert link dialog box displays.

5. Enter the URL and other link properties.

6. Use the Target field to define whether you want the linked site to display in the current window or in a new window.

7. Click **OK**.

Civic Platform displays the new link as a colored, underlined object. When you run the report, or when you use Preview, you can test the link.

## Adding an Anchor and Linking to It

You can add an anchor ("bookmark") to an object within a form, and then create a link to that bookmark from another location within your form. For example, you can insert a bookmark where your agency's address and phone number appear in the form, and then create a hyperlink in the form body that instructs the reader to click the link to see the agency address.

**To add an anchor and create a link to that anchor**

1. With the form layout tool open and your form displayed, position your cursor where you want to insert the bookmark. This location is the destination for the link you want to create.
2. From the **Insert** menu, select **Anchor**. On the Anchor window, enter the name of the anchor. Civic Platform inserts an invisible marker in the form at the location you indicated.
3. Go to the location in your document where you want to create the hyperlink.
4. Highlight the text that you want to use for your hyperlink.
5. From the **Insert** menu, select **Insert link**.  
The **Insert link** dialog box displays.



The screenshot shows the 'Insert link' dialog box. The 'Url' field contains '#myAnchor'. The 'Text to display' field contains 'My Agency'. The 'Title' field is empty. The 'Anchors' dropdown menu is set to 'myAnchor'. The 'Target' dropdown menu is set to 'None'. The 'Ok' button is highlighted in blue.

6. From the **Anchors** drop-down list, select the name of the anchor you created.
7. Use the **Target** field to define whether you want the linked site to display in the current window or in a new window.
8. Click **OK**.  
Civic Platform displays the new link as a colored, underlined object. When you run the report, or when you use Preview, you can test the link.

## Ad Hoc Reports Button and Field Reference

Whether you are creating a new report or a new dashboard, or accessing an existing report or dashboard, you use the ad hoc report writer. The topics in this section describe what you see both on the Report List page and on the Report/Dashboard Designer.

### Topics

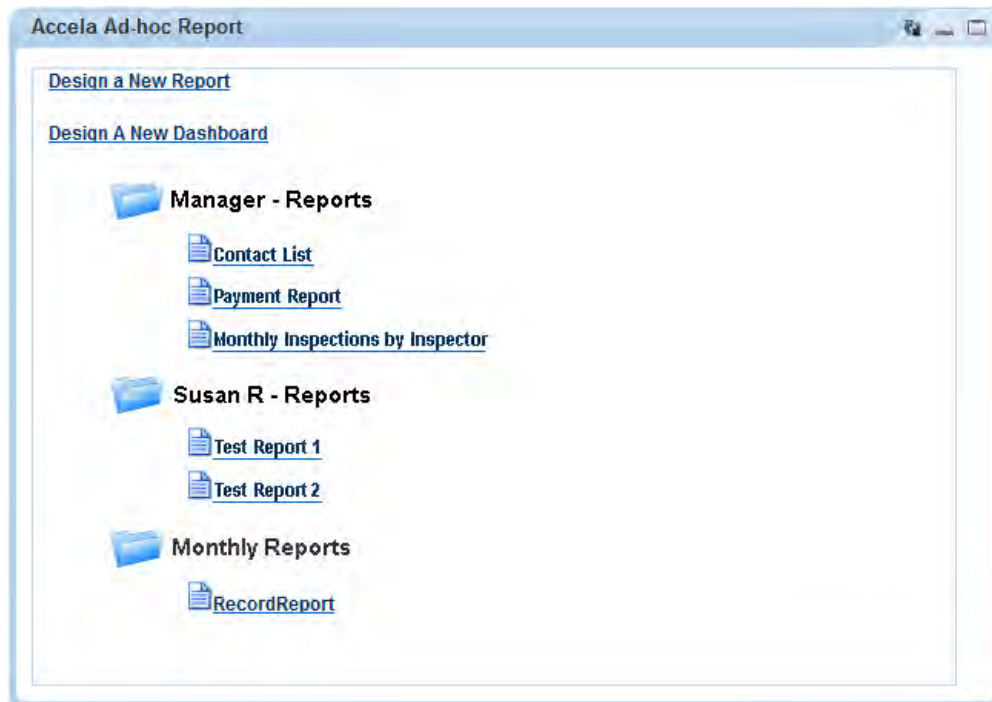
- [What You See on the Ad Hoc Report Writer List](#)
- [What You See on the Report Designer](#)
- [What You See on the Dashboard Designer](#)

### Additional Reference

- [Izenda's Report Design Guide](#)

### What You See on the Ad Hoc Report Writer List

When you first open the ad hoc report writer, you see a display called the Report List. The display contains both a report list (organized by category), and hyperlink commands to design a new report and a new dashboard, as shown in the figure below. Clicking either of the Design hyperlinks opens the Report/Dashboard Designer.



The categories, or folders, are user-defined, and you can decide which reports or dashboards to assign to a category. Click any category to expand or collapse the contents.

Each report in the list has a set of tools you can use to interact with that report. Which tools you can use on a given report depends on your User ID permissions to that report.

To see the toolbar for a report, hover your mouse cursor on the report name in the Report List. The report tools display to the left of the report name as shown in the figure below.





Table 90: Report Toolbar Icons

Button	Control Name	Description
	<b>Delete</b>	Click this button to delete the report.
	<b>Edit</b>	Click this button to edit the report. The Report Designer opens.
	<b>Report Name</b>	The report name is a hyperlink. When you click the name, the report runs and then displays.

## What You See on the Report Designer

The Report Designer provides users with a series of tabs that divide the report building tasks into logical groupings.

Descriptions of the Reports Designer toolbar, the common record controls, the data source sections, and the Report Designer tabs are available in the following sections.

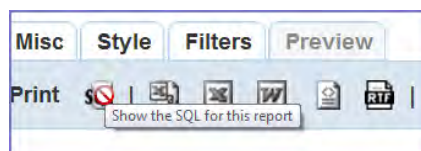
### Topics

- [Report Designer Toolbar](#)
- [Record Control Buttons](#)
- [Data Source Section and DB View Relationships Section](#)
- [Fields Tab](#)
- [Summary Tab](#)
- [Chart Tab](#)
- [Gauge Tab](#)
- [Misc Tab](#)
- [Style Tab](#)

## Report Designer Toolbar

A common element to all the tabs on the Report Designer, the toolbar contains a series of buttons you can use while working in Report Designer.












Hover your mouse cursor over any button to see a brief definition of the button's function. If the button is not active for any reason, Civic Platform displays a 'no access symbol,' as illustrated in the example below.



For additional reference, see Izenda's [Toolbar documentation](#).

The following table lists and defines the buttons available in the Report Designer toolbar:






Table 91: Record Control Buttons

Button	Control Name	Description
 Report List	Report List	Returns user to the Report List page. If you did not save your report, you may lose your work.
 New	New	Creates a new report (without having to return to the Report List page). If you have been working on another report, remember to save your changes before clicking <b>New</b> .
 Save	Save	Saves a new report or saves changes to an existing report.
 Save As...	Save As...	Saves a report with a new name, or an existing report to another category, or a new category (see <a href="#">Creating a New Category</a> ).
 Print	Print	Prints your report to PDF. For a hard copy, you can print the PDF to your printer.
 SQL	SQL	Displays the SQL logic that defines your report.
 CSV	CSV	Exports the report to CSV (comma delimiter) format.
 Excel	Excel	Exports the report to Excel (XLS) format.
 Word	Word	Exports the report to Word format
 XML	XML	Exports the report to XML format.
 RTF	RTF	Exports the report to Rich Text Format (RTF).
	Results field	Defines the number of records to display when previewing a report.

## Record Control Buttons

Many of the tabs share record controls that give you the ability to add additional records, as well as delete and reorganize them. The following table lists and describes those controls.

Table 92: Record Control Buttons

Button	Control Name	Description
	Delete	Deletes the row the button is on.
	Insert Row (above)	Inserts a row above the row that the button is on.
	Insert Row (below)	Inserts a row below the row that the button is on.
	Move	Moves a row up or down in the list.
	Advanced Properties	Opens advanced properties for a row. (Not available on all tabs)

## Data Source Section and DB View Relationships Section

Use the Data Source (Views and Tables) page to define which tables (DB\_VIEWS) you want to use to populate data in your report. You can select one or multiple data sources. You can also select templates that give you access to sets of custom fields/attributes configured for a record, a workflow task, an address, a parcel, an owner, a condition, a licensed professional, or a contact for the agency.


When you select more than one data source, Civic Platform prompts you to create joins between the tables using the DB View Relationships section. A 'join' is when you combine records from multiple tables by using a common value that the tables share. You can choose the type of join you want to use. Options include inner joins, cross joins, and outer joins (left, right, and full).

Your administrator defines which data sources are available to each user. He can use Report Manager to enable data access to each DB\_View, both by User Group and by Module.

For additional reference, see Izenda's [Data Sources Tab documentation](#).

The following table describes the buttons and fields available on the Data Source (Views and Tables) page.

Table 93: Data Sources Buttons, Fields, and Columns

Button/Field	Description
<b>Report List</b>	Returns user to the list of Accela ad hoc reports.
<b>Add Fields</b>	Enabled after you define one or more data sources. Use to move on to the next step in your report creation process: field selection and field definition.
<b>Allow Nulls</b>	Creates a left outer join between the tables. When you do this, the report creates a record for the value in the left-most table, whether there is a record in the right table or not.
<b>Distinct</b>	This option duplicates from the result set. When you select this option, Civic Platform inserts the DISTINCT clause into the sql SELECT statement you are building. After you select fields in the Fields tab, you can click <b>SQL</b> to see how the DISTINCT clause appears in the SELECT statement that you are creating.
<b>Name column</b>	Indicates the name of a data source. Select each data source that you want to use for reporting. If you specify multiple data sources for reporting, you need to create joins between the data sources.
<b>Description column</b>	Provides a description of a data source.
<b>Number of Selected Templates column</b>	Indicates the number of templates that you choose to include in your data source for reporting. You can select the additional information fields contained in the selected template and define them as report criteria.
 <b>Templates button</b>	If templates (sets of custom fields/attributes) are available for a data source, this button displays in the Template column. It displays a template selection list for the selected data source. For more information, see <a href="#">Adding Templates to Your Data Source</a> .

## Fields Tab

Use the Fields tab to define which fields you want to include in your report. The list of fields available to you depends on the data source(s) you select in the DB View Relationships section.

Each field you add on this tab appears as a column on the report. The order of the fields from top to bottom determines the display order (left to right) of the data columns on the report. For example, if you add RECORD\_ID, followed by DATE\_OPENED, and DATE\_CLOSED in the Fields tab and then click **Preview**, you see three columns of data displayed. The columns, from left to right, are Record ID, Date Opened, and Date Closed.

After you select a field, you can define how the data for that field displays in the report by setting field attributes as described in the following tables.

For additional reference, see Izenda's [Fields Tab documentation](#).

### Field Tab Tables

- [Fields, Buttons, and Basic Field Attributes on the Fields Tab](#)
- [Advanced Field Attributes](#)
- [Function Attribute Options](#)
- [Format Options for Numerical field types](#)
- [Format Options for Date field types](#)

**Table 94: Fields, Buttons, and Basic Field Attributes on the Fields Tab**

Attribute	Description
<b>A</b>	This attribute for a given field uses an arithmetic operation to create a calculated column in your report, such as column A = column B + column C. Click multiple times on the box to cycle through the available operators (add, subtract, multiply, divide). See <a href="#">Creating a Calculated Column</a> for information.
<b>Add Pivot</b>	Invokes the Pivot feature, which enables you to create a breakout of additional detail on data in your report, essentially adding extra 'pivot columns' to the right side of your report. For example, you create a report that lists the sum of payments by payment type. You can use Pivot to add additional columns that break out the payment sums by month in addition to the original sum of payments by payment type. See <a href="#">Adding a Pivot Column</a> for more information.
<b>Add Subtotals</b>	Creates sub-totals when you have applied visual grouping. A subtotal for each group displays. The ad hoc report writer makes a best guess at which field is to be sub-totaled and the function to use. If you want to change the subtotal function, use the Subtotal Function drop-down list in the Advanced Attributes to choose the function you want.
<b>Continue to Summary</b>	After you define one or more data sources and then set up the fields you want to display, this button becomes active. Use it to move on to the next step in your report creation process: defining a report summary.
<b>Description</b>	The ad hoc report writer uses this field attribute as the column header in the report. When you select a field, the ad hoc report writer writes a default description to this box. You can modify the field description/column header as needed.
<b>Field</b>	The field(s) you are adding to your report. The order in which fields appear on this tab (top to bottom) is the order in which the ad hoc report writer displays field data (left to right) in columns when you run the report. This drop-down list auto-populates based on the data source(s) you define.
<b>Format</b>	This field attribute defines how you want the data for a given field to display. The contents of this attribute drop-down list varies, depending on the field type. For text fields, this list is empty. For number fields, you have a variety of options. See <a href="#">Format Options for Numerical field types</a> and <a href="#">Format Options for Date field types</a> for formatting options.
<b>Function</b>	This field attribute applies a function to a given field. If you apply a function to one field, you must apply a function to all the fields in your report. If you select the Group option, you can create a group of fields. See <a href="#">Function Attribute Options</a> for available Function options.
<b>Preview</b>	Shows a preview of the report you are creating.

Attribute	Description
<b>Records field</b>	This restrict the number of records returned when you preview the report. For example, if you enter 25 and then click Preview, your report displays only 25 rows of data.
<b>Sort</b>	This sorts the rows in your table in ascending order based on a given field. To sort rows in descending order, go to <a href="#">Advanced Field Settings</a> .
<b>VG</b>	This changes the field values for the current field into subheadings, grouped by field value. See <a href="#">Visually Grouping by Field Value</a> for more information about using visual grouping.
<b>Hide Grid</b>	Hides or shows table grids for report styling.
<b>Remove All</b>	Removes all fields from the report in the Viewer.

For descriptions of the advanced field attributes, see Izenda's [Advanced Field Settings](#).

Table 95: Function Attribute Options

Function Name	Description
<b>Group</b>	Groups field values together for aggregating
<b>Count</b>	Counts the number of values in a column.
<b>Count Distinct</b>	Counts the number of distinct values in a column.
<b>Sum</b>	Sums the value in a field.
<b>Average</b>	Takes the average value of a field.
<b>Maximum</b>	Takes the maximum value in a field.
<b>Minimum</b>	Takes the minimum value in a field.
<b>Group(Date),(Day), (Month), (Year)</b>	Groups a date field by value.

Table 96: Format Options for Numerical field types

Format Option	Description	Examples
<b>0,000</b>	Displays the number as a whole number.	11231,2341,234,567
<b>\$0.00</b>	Displays the number as currency	\$123.45\$0.12
<b>0.0</b>	Displays the number with one decimal place	123.5
<b>0.00</b>	Displays the number with two decimal places	123.46
<b>0.000</b>	Displays the number with three decimal places	123.456
<b>0%</b>	Displays the number as a percentage	1%12%

Table 97: Format Options for Date field types



Format Option	Description	Examples
<b>Short Date</b>	Displays the date using the mm/dd/yyyy format	8/1/1996
<b>Long Date</b>	Displays the day of the week, month, numeric day, and the year	Friday, August 09, 1996
<b>Short Time</b>	Displays time as hh:mm AM/PM	12:34 AM
<b>Long Time</b>	Displays time as hh:mm:ss AM/PM	12:34:56 PM
<b>Full(short)</b>	Displays the Long Date format, followed by the Short Time format	Friday, August 30, 1996 4:34 PM

Format Option	Description	Examples
<b>Full(long)</b>	Displays the Long Date format, followed by the Long Time format	Wednesday, October 23, 1996 2:28:37 AM
<b>D&amp;T (short)</b>	Displays the Short Date format, followed by the Short Time format	3/12/1996 7:45 PM
<b>D&amp;T (long)</b>	Displays the Short Date format, followed by the Long Time format	2/27/1996 12:45:13 AM

## Form Layout Tool

If your agency has obtained a license key to access the form layout tool in ad hoc reports, you can use the form layout tool to create forms, edit forms, and add data fields.

The form layout tool uses a standard, easy-to-user document editing user interface. It works in the same manner as any browser-based text editor which provides:

- WYSIWYG editor with a standard editing user interface
- A source code window to show the underlying HTML code. To open the source code window, click the **HTML** button . Customizations entered in the source code window render in the editor and preview window.
- A preview window. To open the preview window, from the **View** menu, select **Preview**. Alternatively, click the **Preview** button .

## Summary Tab

Use the Summary tab to create a sub-table within your report output that provides a less granular view of the report data; for example, a high level overview in addition to the report details you set up.

For example, you create a payment report that lists the sum of incoming payments by month. You can add a Report Summary that provides readers with a total count of incoming payments, an average payment intake value per month, or other useful information.

For additional reference, see Izenda's [Summary Tab documentation](#).

The following table lists and defines the fields and attributes on the Summary tab.

Table 98: Summary Tab Fields and Buttons

Function Name	Description
<b>Title</b>	This is the title for the report summary.
<b>Records</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Field</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Description</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Sort</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Function</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.

Function Name	Description
<b>Format</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Add Subtotals</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.
<b>Add Deltas</b>	Any time there is a change in a quantity, the ad hoc report writer calculates that change by taking the later value for that quantity and subtracting from it the earlier value for that quantity. You can capture this change in a report by selecting the Add Deltas option.
<b>Continue to Chart</b>	When you finish defining a report summary, click this button to move to the next tab and the next set of actions: setting up charts.
<b>Preview</b>	See <a href="#">Fields, Buttons, and Basic Field Attributes on the Fields Tab</a> for a definition of this field.

## Chart Tab

Use the Chart tab to create a chart, or graph, for your report using the data from the data source you selected when you created your ad hoc report.

Each chart type has a unique set of fields and settings you can use to define how your chart appears. Choose a chart type from the following list to see a list of fields and settings for that chart type. See [Working with Graphs](#) for more information about creating charts.

- [Trend Chart Fields and Settings](#)
- [Pie Chart Fields and Settings](#)
- [Plot Chart Fields and Settings](#)
- [Bar Chart Fields and Settings](#)
- [Funnel Chart Fields and Settings](#)

For additional reference, see Izenda's [Chart Tab documentation](#).

## Trend Chart Fields and Settings

When you select a trend chart, the following fields and settings are available for you to configure.

Table 99: Trend chart fields and settings

Function Name	Description
<b>Separator/Function</b>	If you want to compare multiple sets of data on the same chart, use the Separator drop-down list to define the field you want to use to separate your data. For example, you can select the same date field you used for the x-axis, and set the Function to Group(Year). When you run the report, you see separate results for each year (you can use the Filter tab to set parameters) overlaid on the same grid. See <a href="#">Trend Chart Example</a> for an example.
<b>Show Legend</b>	Displays a legend for your chart.
<b>Show Value Labels</b>	Displays the value of each data point.
<b>Smooth</b>	Changes the trend line from angular to smooth.
<b>Label Title (Bottom)</b>	This is the label for the x-axis.
<b>Label Title (Left)</b>	This is the label for the y-axis.

Function Name	Description
Scale %	This defines how large you want the chart to appear in your report as compared to the default size. For example, if you enter 75, the chart displays at 75% of the default size. If you enter 125, the chart displays 25% bigger than the default size.

## Pie Chart Fields and Settings

When you select a pie chart, the following fields and settings are available for you to configure.

Table 100: Pie chart fields and settings

Function Name	Description
Separator/Function	If you want to break out the data into multiple sets, use the Separator drop-down list to define the field you want to use to separate your data. For example, you can select the Date_Payment field and set the Function to Group(Year). When you run the report, a pie chart for each year displays (you can use the Filter tab to set parameters).
Show Legend	Displays a legend for your chart.
Show as 3D	Displays the pie chart in a 3D view.
Explode Largest Slice	This causes the largest slice of a pie chart to be extracted slightly from the main body to make it more visible.
Show Percentage	Displays the percentage value of the total that each slice of the pie represents.
Show Value Labels	Displays the actual value (from the Value field) that each slice of the pie represents.
Show Slice Labels	Displays the actual value (from the Label field) that each slice of the pie represents.
Combine Bottom %	This is a percentage value that represents a combined percentage value. It is used to combine the smallest slices into a single group and label the group as Other on the chart. For example, to combine the bottom 10% of slices into one, enter 10. The ad hoc report writer adds the smallest percentage values together, not to exceed 10% and displays the aggregate value as a single slice.
Chart Type	This is the type of pie chart. Options include Pie or Doughnut.
Scale %	This defines how large you want the chart to appear in your report as compared to the default size. For example, if you enter 75, the chart displays at 75% of the default size. If you enter 125, the chart displays 25% bigger than the default size.
Target Report	This enables you to select a sub-report for your chart. You must create and save a sub-report before you can use it as a Target Report. When you run the report, the sub-report displays when you invoke the effect you choose in the <b>Effect</b> field.
Effect	This is the effect you want to use to display the sub-report selected in the <b>Target Report</b> field. Choices are <b>Popup</b> (sub-report displays in a popup upon click of a pie slice), <b>Hover</b> (sub-report displays in popup on mouseover of a pie slice), and <b>Link</b> (sub-report displays in a new window upon click of a pie slice).

## Plot Chart Fields and Settings

When you select a plot chart, the following fields and settings are available for you to configure.



Table 101: Plot chart fields and settings

Function Name	Description
<b>Separator/Function</b>	If you want to compare multiple sets of data on the same chart, use the Separator drop-down list to define the field you want to use to separate your data. For example, if you chose a date field for the x-axis, you can select the same field as the Separator and set the Function to Group(Year). When you run the report, you see a separate plot line for each year (you can use the Filter tab to set parameters) overlaid on the same grid.
<b>Show Legend</b>	This displays a legend for your chart.
<b>Connect</b>	This connects the plot points on the chart with a line.
<b>Auto-Scale</b>	
<b>Scale %</b>	This defines how large you want the chart to appear in your report as compared to the default size. For example, if you enter 75, the chart displays at 75% of the default size. If you enter 125, the chart displays 25% bigger than the default size.

## Bar Chart Fields and Settings

When you select a bar chart, the following fields and settings are available for you to configure.

Table 102: Bar chart fields and settings

Function Name	Description
<b>Separator/Function</b>	If you want to compare multiple sets of data on the same chart, use the Separator drop-down list to define the field you want to use to separate your data. For example, if you chose a date field for the x-axis, you can select the same field as the Separator and set the Function to Group(Year). When you run the report, you see a set of bars for each x value, where each bar in the set represents data for a given year (you can use the Filter tab to set parameters). See <a href="#">Bar Chart Example</a> for an example.
<b>Line Value</b>	This defines a field to use as the y-axis value in creating a plot line to run on top of your bar chart. If you define a line value, the Show Pareto option becomes disabled.
<b>Show Legend</b>	This displays a legend for your chart.
<b>Show Pareto</b>	This creates a pareto chart that contains both bars and a line graph, with individual values represented in descending order by the bars, and the cumulative total represented by the line. If you create a pareto chart, the Line Value field becomes disabled.
<b>Stacked</b>	Select this option if you use a separator value and you want to display the bars in stacked format rather than side by side,
<b>Horizontal</b>	Select this option to display your bar chart horizontally rather than vertically (default display).
<b>Shade Area Under Line</b>	Select this option to apply a shadow to the line created by selecting a field for Line Value. If you do not populate Line Value, this box becomes disabled.
<b>Label Title (Bottom)</b>	This is the label title for the bottom value set of your chart. This title corresponds to the Label data set.
<b>Value Title (Left)</b>	This is the label title for the left side value set of your chart. This title corresponds to the Value data set.
<b>Value Title (Right)</b>	This is the label title for the left side value set of your chart. This label corresponds to the data set for either the <b>Line Value</b> field or the <b>Pareto</b> plot. If you are using neither of these, this field becomes disabled.

Function Name	Description
Scale %	This defines how large you want the chart to appear in your report as compared to the default size. For example, if you enter 75, the chart displays at 75% of the default size. If you enter 125, the chart displays 25% bigger than the default size.
Target Report	This enables you to select a sub-report for your chart. You must create and save a sub-report before you can use it as a Target Report.

## Funnel Chart Fields and Settings

When you select a funnel chart, the following fields and settings are available for you to configure.

Table 103: Funnel chart fields and settings

Function Description	Description
Show Percent	This displays the percentage value of the total that each disk represents.
Scale %	This defines how large you want the chart to appear in your report as compared to the default size. For example, if you enter 75, the chart displays at 75% of the default size. If you enter 125, the chart displays 25% bigger than the default size.
Target Report	This enables you to select a sub-report for your chart. You must create and save a sub-report before you can use it as a Target Report.

## Gauge Tab

In the Gauge tab, you can add one or more radial or linear gauges to a report.

For additional reference, see also [Izenda's Gauge Tab documentation](#).

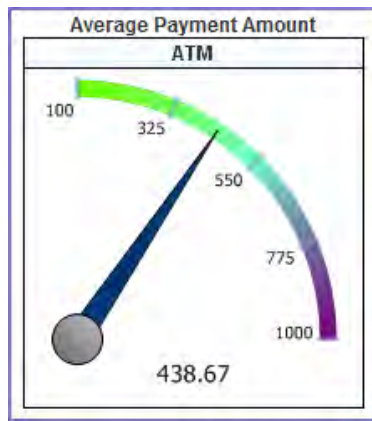
A gauge is a graphical status indicator much like a car speedometer. The gauge displays a needle that moves within a range of numbers displayed on its outside edges. Gauges display the value of a single metric.

You can design up to 12 gauges. Designing multiple gauges provides readers with a way to compare multiple values. Multiple gauges display in a panel similar to the gauge panel in the figure below.

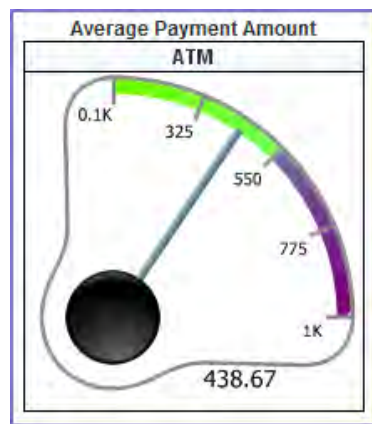


Figure 31: Gauge Panel

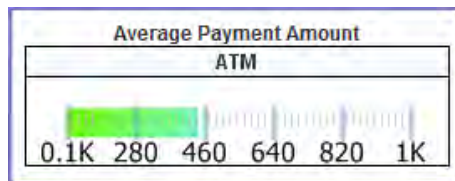
You can choose from three types of gauges. Each type is illustrated in the following figures.



**Figure 32: Gauge Type Radial 1**




**Figure 33: Gauge Type Radial 2**



**Figure 34: Linear Gauge**

The following table lists and defines the fields and attributes on the Gauges tab.

Table 104: Gauge Tab Fields and Attributes

Attribute	Description
<b>Color</b>	<p>This field can be used to adjust the color and color gradient in your gauge. Enter a percentage value and the color you want to use at that point using this format:</p> <pre>#%:ColorName</pre> <p>, where</p> <pre>#</pre> <p>is the percentage value and</p> <pre>ColorName</pre> <p>is the color you want to apply. You can enter multiple values, separating each value with a semicolon. For example, we used the following color settings to create the gauge in <a href="#">Gauge Type Radial 1</a>:</p> <pre>0%:LawnGreen;50%:CornflowerBlue;100%:Purple</pre> <p>. To see what colors are available to use, go to the Style tab and view the drop-down list for any element color field.</p>
<b>Continue to Misc</b>	When you finish creating gauges, click this button to move to the next tab and the next set of actions.
<b>Gauge Style</b>	This is the gauge style to be used in your report. See <a href="#">Gauge Type Radial 1</a> , <a href="#">Gauge Type Radial 2</a> , and <a href="#">Linear Gauge</a> for illustrations of the different types.
<b>Minimum/Maximum</b>	These fields define the range of values to use for the gauge.
<b>Name</b>	<p>This defines a field to use for the gauge labels. Values from the chosen field serve as labels for each gauge you create. If you have more label values than gauges, Civic Platform creates gauges for the first x number of labels values sorted in ascending order, where x is the number of gauges you are creating as defined in the Results field.</p> <p> <b>Note:</b></p> <p>You cannot directly pick which label value to create a gauge for. However, you can use the Filters tab to hide the label values you do not want to create gauges for. See <a href="#">Filters Tab</a>.</p>
<b>Results</b>	This is how many gauges you want to show. If you choose to count the number of products in multiple categories, you could specify that you want to only show the first 4 categories by alphabetical order. You can create up to 12 gauges. See <a href="#">Gauge Panel</a> for an example of multiple gauges.
<b>Preview</b>	This runs a preview of your report so you can check your report output.
<b>Sort/Function</b>	When you create a number of gauges that is fewer the number of available gauge labels, the ad hoc report writer creates gauges for the first x (number) gauge labels, where x is the number of gauges you are creating. This field defines how the ad hoc report writer determines the sort order of gauge labels. For example, if you choose the same field for Sort as you chose for Name, you can apply a function COUNT. You can then turn on reverse sort (z to a) to make the highest count appear at the top of the list.
<b>Target Report</b>	This enables you to select a sub-report for your chart. You must create and save a sub-report before you can use it as a Target Report.
<b>Title</b>	Enter a title for the gauge or panel of gauges.

Attribute	Description
<b>Value/Function</b>	Choose a field from the drop-down list that represents the value you want to measure with your gauges, then apply a Function to that field that displays the data you want to see. For example, to create a gauge that measures the average payment intake, you can choose AMOUNT as the Value, and apply the function AVERAGE to that value. When the ad hoc report writer creates the gauge, it shows the average payment intake.

## Misc Tab

Use the Misc Tab to add a title, description, header, and footer for your report. You can define what type of justification that you want to apply for each of these elements as well as for the **Report Header Image** (the logo). The choices are (L) left justification, (R) right justification, and (M) middle/center justification. You can also set permissions for your report, defining whom you want to be able to access your report, and what you want to allow them to do.

For additional reference, see Izenda's [Misc Tab documentation](#).

The following table lists and defines the fields, buttons, and attributes available on the Misc tab.

Table 105: Misc Tab Fields and Buttons

Field/Button	Description
<b>Description</b>	This is a description of the report. Toggle the Justification button for the Title field to define whether you want the text left justified, right justified, or middle justified.
<b>Drill-down Key</b>	This defines the drill-down key for use with a sub-report (as defined in the Target Report field on the Charts tab).
<b>Footer</b>	This defines report footer content. Toggle the Justification button for the field to define whether you want your footer left justified, right justified, or middle justified.
<b>Header</b>	This defines Report Header content. Toggle the Justification button for the field to define whether you want your header left justified, right justified, or middle justified.
<b>Owner</b>	This field identifies the user name of the individual who created the current report.
<b>Share With/Rights</b>	These fields define who you want to share the current report with, and what permissions you want to give them when interacting with the report. Select Shared to allow other users to see your report and modify it. Select Read only to set the report so that it is only modifiable by the report owner. Select View Only to allow other users to simply view the report and not make any modifications.
<b>Title</b>	This is the title of your report. Toggle the Justification button for the Title field to define whether you want your title left justified, right justified, or middle justified.

## Style Tab

Use the Style tab to customize the look of your table by changing the color of borders, headers, and rows. When you apply new colors, you can see the end result immediately reflected in the sample grid available on the tab.

You can set report properties on this page as well. See the table below for a list of properties and definitions.

Table 106: Style Tab Fields and Buttons

Field/Button	Description
<b>Border Color, Header Color, Header Foreground Color, Item Color, Item Foreground Color, Alternating Item Color</b>	This allows you to select a color from for each table element. Refer to the Sample Grid below the Restore Default button to see how the colors you choose, appear.
<b>Restore Default</b>	This restores the default color settings for the six color fields.
<b>Landscape Printing</b>	This prints your report in landscape page format.
<b>Show Page Number</b>	This displays page numbers on PDF output reports.
<b>Show Date and Time</b>	This displays the date and time of the report run on PDF output reports.
<b>Use Pagination in Webview</b>	This enables readers to see pagination in web view. Normally, pagination is not applicable in web view.
<b>Add Bookmarks for Each Visual Group</b>	This adds PDF bookmarks for each visual group. You must have applied the VG attribute to a field and you must print to PDF to see these bookmarks.
<b>Page Break after Visual Groups (PDF)</b>	This applies page breaks for each visual group, such that each visual group begins on a new page. You must have applied the VG attribute to a field and you must print to PDF to see this result.
<b>Minimize grid width</b>	This trims the width of the columns in your table to match the widest field value, eliminating unused space.
<b>Visual Group Style</b>	This style applies to visual groups sub-headers that contain more than one field value; for example, Name and City. You must have applied the VG attribute to more than one field to see this result.
<b>Items per Page (in viewer)</b>	This limits the number of rows displayed per page in your report viewer.
<b>Report Order</b>	The Move Up and Move Down buttons allow you to change the order in which the different parts of your report display. The order in which the parts appear in this field is the order in which they display when you run the report.
<b>Field/Value Column Pairs</b>	This sets the field value style, which can be useful for accounting and financial reports.
<b>Show main report in Field/Value Style</b>	This changes the main report table to display in the Field/Value style defined in Field/Value Column Pairs field.
<b>Show summary report in Field/Value Style.</b>	This changes the summary report table to display in the Field/Value style defined in Field/Value Column Pairs field.
<b>Continue to Filters</b>	When you finish setting styles, click this button to move to the next tab and the next set of actions.
<b>Preview</b>	This runs your report and check your report output.
<b>Enable Responsive Grid</b>	Check this box to enable responsive grids. For details, see <a href="http://wiki.izenda.us/Guides/ReportDesign/12.0-Pivots-in-Izenda">http://wiki.izenda.us/Guides/ReportDesign/12.0-Pivots-in-Izenda</a> .
<b>Pivot columns per exported page</b>	Specifies the number of pivot columns on an exported page. For details, see <a href="http://wiki.izenda.us/FAQ/Responsive-Grid">http://wiki.izenda.us/FAQ/Responsive-Grid</a> .

## Filters Tab

Use the Filters tab to filter the data from the data source(s) so that Civic Platform uses only pertinent results in your tables, charts, and gauges.

The following fields and attributes may appear on the Filters tab:

Table 107: Misc Tab Fields and Buttons

Field/Button	Description
<b>Filter Field</b>	This defines the field on which to filter the data returned from your data source(s).
<b>Operator</b>	This defines the operation to perform on the field you selected as the Filter Field.
<b>Values</b>	This is the value to which the ad hoc report writer applies the operation. For example, "Begins With A" returns only those records with entries in the filter field that start with "A."
<b>Blank</b>	This defines whether you want this filter to return both data that matches the defined Values and data that has a blank/null value in that field. This control does not affect the Preview view.
<b>Param</b>	This defines whether you want to display this filter and the current settings in the Report Viewer, allowing the user to change the filter value. This control does not affect the Preview view.
<b>Show Filters in Report Description</b>	This writes a read-only summary of the report filters you created to the Description field for the report.
<b>Require X Parameters in Viewer</b>	This option require the reader of the report to set one or more filter values before the report contents display.
<b>Preview</b>	Use this button to run your report and check your report output.

## Preview Tab

Use the Preview tab to view a preliminary version of the your report, including any table, summary table, chart, or gauge you added. Return to any of the previous tabs to make changes, then click the Preview button or tab to see how those changes affect report output.

## What You See on the Dashboard Designer

Use the Dashboard Designer to add multiple reports for display in a single viewer. When you select the reports to display in your dashboard, the ad hoc report writer prompts you to select which report part to use. You can elect to use the table, the summary, a chart, or gauges - whichever is more useful for your purposes.



### Note:

You must create reports before you can add them to a Dashboard display. See [Designing a New Report](#)

The Dashboard Designer contains multiple sets of report selection fields. Each set you define displays a different report in your dashboard. The table below lists and defines the report selection and the permission fields available on the report designer, as well as the buttons available in the toolbar.

Table 108: Dashboard Design Form Buttons and Fields

<b>New</b>	Creates a new report and opens the Report Designer.
<b>Preview</b>	Previews your dashboard design.
<b>Print</b>	Prints your dashboard to your computer's default printer.
<b>Records</b>	This is the number of records to show; includes All and All (No scroll bar).
<b>Report</b>	This is the report you want to add to your dashboard display.
<b>Report List</b>	This returns you to the Report List view.
<b>Report Part</b>	This is the report part you want to use in your dashboard display. This list populates based on the parts (Chart, Gauges, Summary Detail) of the report you selected.
<b>Save</b>	This saves your dashboard.

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<b>Save as</b>	This allows you to save your dashboard with a new name and/or to assign your dashboard to a category.
<b>Share With/Rights</b>	This defines who you want to share the dashboard with, and what permissions you want to give them when interacting with the dashboard. "Shared" allows other users to see your dashboard and modify it. "Read only" sets the dashboard so that it is only modifiable by the owner. "View Only" allows other users to view the dashboard but not make any modifications.
<b>Title</b>	This is the title for the report

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## SmartCharts

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Choose a topic from the list below to learn more about working with SmartCharts.

### **Related Information**

[SmartCharts Overview](#)

[Examining SmartChart Types](#)

[Viewing a SmartChart](#)

[Accessing the SmartChart Portlet](#)

[Creating a New SmartChart](#)

[Editing a SmartChart](#)

[Deleting a SmartChart](#)

[Organizing the SmartChart Portlet](#)

[Examining the SmartCharts Form](#)

## SmartCharts Overview

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A SmartChart is a graphical representation of data; for example, a bar chart or line graph.


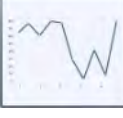



You can generate a SmartChart as needed to represent the data in a list view. The visual of a SmartChart can help you compare data more effectively. For example, you can generate a SmartChart that shows you how many building projects are occurring on the same street, or you can have a SmartChart that identifies all your open records and sorts them by type. If your agency has set permissions accordingly, you can customize your SmartCharts to most effectively represent the information that you need.

QuickQueries that affect the list contents also affect the values that display in the SmartChart. If you apply a different QuickQueries to a list, the SmartChart contents refresh to reflect the contents of the new list. For more information, see [Understanding QuickQueries](#) .

## Examining SmartChart Types

SmartCharts come in several types.

Table 109: SmartChart Types

	<p>Column Bar Chart</p>	<p>Column bar charts are used to compare different items of data. This type of chart can be useful for comparing workload or other important values.</p>
	<p>Line Chart</p>	<p>Line charts represent the changing value of one item of data, typically over a period of time. This type of chart can be useful for observing trends.</p>
	<p>Pie Chart</p>	<p>Pie charts display data by percentage, giving you a visual view of each data group's relationship to other data groups and to the whole. This option can be useful for identifying needs such as staffing.</p>
	<p>Odometer</p>	<p>Odometer charts track a single value and serves as a counter. This type of chart can be useful for keeping a running tally of any meaningful action or event.</p>
	<p>Speedometer</p>	<p>Speedometer charts track a single data item and provide a visual representation of frequency or volume at a given point. This type of chart can be useful in tracking workload and identifying potential problems before they become critical.</p>

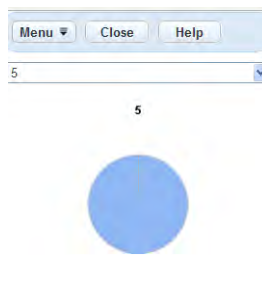
## Viewing a SmartChart

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It is easy to access SmartCharts in Civic Platform.

### To view a SmartChart

1. Navigate to the portlet you want to work in.
2. Hover over the Menu button to display a menu, then choose **SmartCharts** from the menu.  
Civic Platform displays a thumbnail of the default SmartChart to the right of the list.



To view a full-size SmartChart, click the SmartChart thumbnail.



### Note:

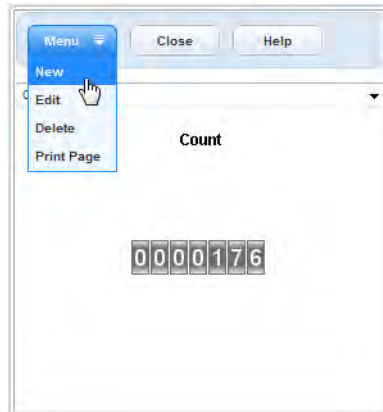
You need to install Sun browser plug-in JVM version 1.4 or newer to view a full-size SmartChart.

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## Accessing the SmartChart Portlet

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1. Navigate to the portlet you want to work in.
2. Hover over the Menu button to display a menu, then choose **SmartCharts** from the menu.  
Civic Platform displays a thumbnail of the default SmartChart to the right of the list.
3. Hover on Menu, then choose **New**.



A SmartChart form displays in a new window.

## Creating a New SmartChart

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You can create one or more SmartCharts as needed.

### To create a new SmartChart

1. Complete the form as needed for the type of chart you are creating. Be sure to populate required fields (indicated by a red asterisk in the field label).  
For a list of what types of charts are available, see [SmartChart Types](#) in this chapter.  
For a description of the fields, [SmartChart Fields](#) in this chapter.
2. Click **Submit**.
3. To close the SmartChart thumbnail, click **Cancel**.

## Editing a SmartChart

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If your SmartChart is not displaying the exact information you want, you can modify it to suit your needs. By customizing your SmartCharts, you can more effectively and quickly get the information that you need.

### To edit a SmartChart

1. Navigate to the portlet you want to work in.
2. Select **SmartChart** from the **Menu** drop-down list.  
Civic Platform displays a thumbnail of the default SmartChart to the right of the list.
3. To view a full-size SmartChart, click on the SmartChart thumbnail.

**Note:**

You must have installed Sun browser plug-in JVM version 1.4 or newer to view a full-size SmartChart.

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4. Use the drop-down list that displays above the SmartChart to choose the SmartChart you want to work with.  
If the drop-down list is empty, you can create a new SmartChart (See [Creating a New SmartChart](#)).
5. Choose **Edit** from the SmartChart portlet menu.  
Civic Platform displays a form you can use to edit the SmartChart.
6. Modify data as needed.  
For a description of the fields, see [SmartChart Fields](#).
7. Click **Submit**.
8. To close the SmartChart thumbnail, click **Cancel**.

## Deleting a SmartChart

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When a SmartChart is no longer needed, you can removed it from the display.

### To delete a SmartChart

1. Navigate to the portlet you want to work in.
2. Select **SmartChart** from the **Menu** drop-down list.  
Civic Platform displays a thumbnail of the default SmartChart to the right of the list.
3. Use the drop-down list that displays above the SmartChart to choose the SmartChart you want to delete.
4. Choose **Delete** from the SmartChart portlet menu.
5. To close the SmartChart thumbnail, click **Cancel**.



## Organizing the SmartChart Portlet

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You can modify which charts display in the SmartCharts Portlet and the order in which the charts appear. Your agency administrator determines the charts you can select from.

If the SmartChart portlet is empty, contact your agency administrator. The portlet may be empty because your administrator has not assigned any SmartCharts to your user group or because your user group does not have access to SmartChart functionality.

### To organize your SmartChart portlet

1. Navigate to the portlet you want to work in.
2. Select **SmartChart** from the **Menu** drop-down list.  
Civic Platform displays a thumbnail of the default SmartChart to the right of the list.
3. Click **Edit**.  
Civic Platform displays a pop-window for the SmartChart Organizer.
4. If you want to show or hide a SmartChart:
  - a. Select one or more fields from the list of available SmartCharts. Hold the CTRL key to select multiple fields.
  - b. Click the right and left-facing arrows to move the SmartCharts into the correct boxes to either hide or show. Click the double arrows to move all SmartCharts.
5. If you want to change the SmartChart sequence:
  - a. In the Show list, select the SmartChart that you want to move.
  - b. Click the up or down arrow to change the position of the SmartChart in the sequence.  
Civic Platform displays selected SmartCharts from left to right on horizontal portlets and top to bottom on vertical portlets.
6. When the Show SmartCharts list displays only the SmartCharts you want to display, in the order that you want to display them, click **Submit**.  
Civic Platform updates the portlet to reflect your changes.

## Examining the SmartCharts Form

When you create a new SmartChart (or edit an existing one), a SmartCharts form is displayed. Use the fields on the form to define what type of chart you want to create, what data values you want to use, and how you want the chart to appear. The table below lists the fields available by default in the SmartChart form.

Table 110: SmartChart Fields

<b>Background Color</b>	The color behind the actual chart. HTML hexadecimal value for colors can be used, or a color can be chosen from the color palette.
<b>Category (X) Axis Label</b>	(Column (bar) or Line chart) The label text that you want to display below the horizontal axis. The <b>Show Category (X) Axis Label</b> field must be set to Yes to see this label.
<b>Chart Type</b>	The type of chart. Options include Column (Bar) Chart, Line Chart, Pie Chart, Odometer, and Speedometer. See <a href="#">SmartChart Types</a> for more information about the chart types.
<b>Column</b>	(Column (bar) or Line chart) This is the column to be used for grouping SmartChart values. For example, if you want to display a line chart showing the number of each application type in your list, choose Record Type.
<b>Critical Start</b>	(Speedometer) The value at which you want to start displaying a different color, which indicates a critical zone.
<b>Date Column Calculations</b>	(Column (bar) or Line chart) This option is used to base statistical function and resulting SmartChart values on date columns. Use the <b>Date Operand</b> field to specify the date range that you want to use. For example, if you want to determine how many days it takes to process certain types of applications after they were submitted, select "Closed Date" in the first operand field and "Opened Date" in the second.
<b>Numeric Columns</b>	(Column (bar) or Line chart) This option is used to base statistical function and resulting SmartChart values on a numeric column. For example, if you want to display a pie chart showing the average progress of certain types of applications, choose "Percent Complete."
<b>Range Start/End</b>	(Speedometer) This indicates the range of values you want to display, and define the start and end points of your speedometer.
<b>Show Category (X) Axis Label</b>	(Column (bar) or Line chart) This controls the display of a label below the horizontal (category) axis. Use the <b>Category (X) Axis Label</b> field to define label content.
<b>Show Legend</b>	(Line or Pie chart) This controls the display of a legend.
<b>Show Title</b>	This controls the display of a title at the top of the SmartChart.
<b>Show Value (Y) Axis Label</b>	(Column (bar) or Line chart) This controls the display of a label for the vertical (value) axis.
<b>SmartChart Title</b>	The name of the SmartChart. If you want the title to appear on the SmartChart, set <b>Show Title</b> to Yes.
<b>Statistical Function</b>	(Column (bar) or Line chart) This is the statistical function that you want to use to calculate numeric SmartChart values. Options include: average, sum, count, minimum, maximum, standard deviation, variance. For example, if you want to display a line chart showing the number of each application type in your list, choose "Count."
<b>Thumbnail Height/Width</b>	The height and width in pixels of the thumbnail view of the SmartChart.
<b>Value (Y) Axis Label</b>	(Column (bar) or Line chart) The label text that you want to display on the vertical (value) axis. The <b>Show Category (Y) Axis Label</b> field must be set to Yes to see this label.
<b>Warning Start</b>	(Speedometer) The value at which you want to start displaying a different color, which indicates a warning zone.

## Workflows and Workflow Tasks

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Choose a topic from the list below to learn more about working with workflows and tasks.

### **Related Information**

[Workflow and Tasks Overview](#)

[Accessing and Viewing Tasks](#)

[Working in the My Tasks Portlet](#)

[Working with Workflows and Workflow Tasks](#)

## Workflow and Tasks Overview

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A workflow is a set of tasks your agency links together to accomplish a certain process, such as processing an application or tracking a service request. Once set up, a good workflow functions as an automated to-do list for each record, ensuring that tasks are done in the proper order by the proper personnel, with no detail falling between the cracks.

Since each application, service request, or work order has its own workflow, you likely have a number of tasks assigned to you from many different record workflows. Civic Platform makes it easy to manage your tasks both from the Workflow tab for a record and from the My Tasks portlet.

## Accessing and Viewing Tasks

### Topics

- [Accessing Tasks via the Workflow Tab](#)
- [Accessing Sub-Tasks within the Workflow Tab](#)
- [Accessing Tasks from the My Tasks Portlet](#)
- [Accessing Tasks from the Task Management Portlet](#)

### Accessing Tasks via the Workflow Tab

When you review tasks on the Workflow tab of a record, it helps you understand where the record is in its processing, who is involved in the process, and what still needs to be done, whether by you or by another person.

#### To view the tasks for a record

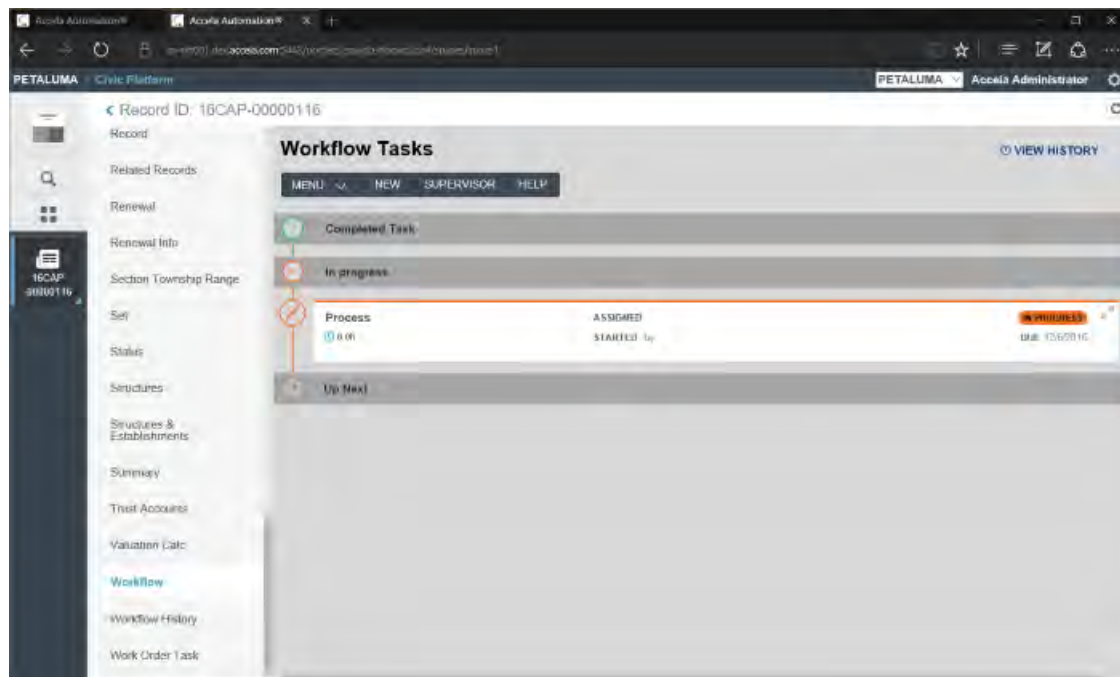
1. From the desired portlet (for example, the Building portlet or the Service Requests portlet), locate and open the record you want to work with.

See [Performing a Portlet Search](#) for instructions on locating a record.

2. In the record details, navigate to the Workflow tab.

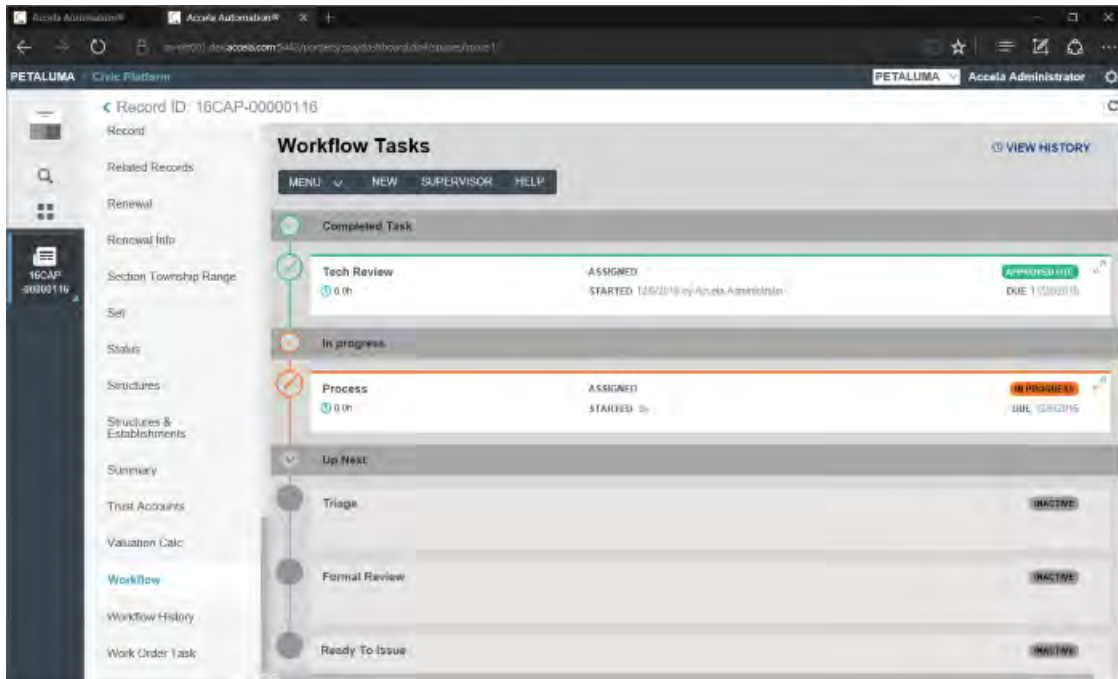
Civic Platform displays the workflow summary card view for the record.

The Workflow Tasks summary card view allows users to track the progress of an application throughout the workflow process. Users can easily access information for each step in the process and quickly see which steps are complete and incomplete, required and optional.



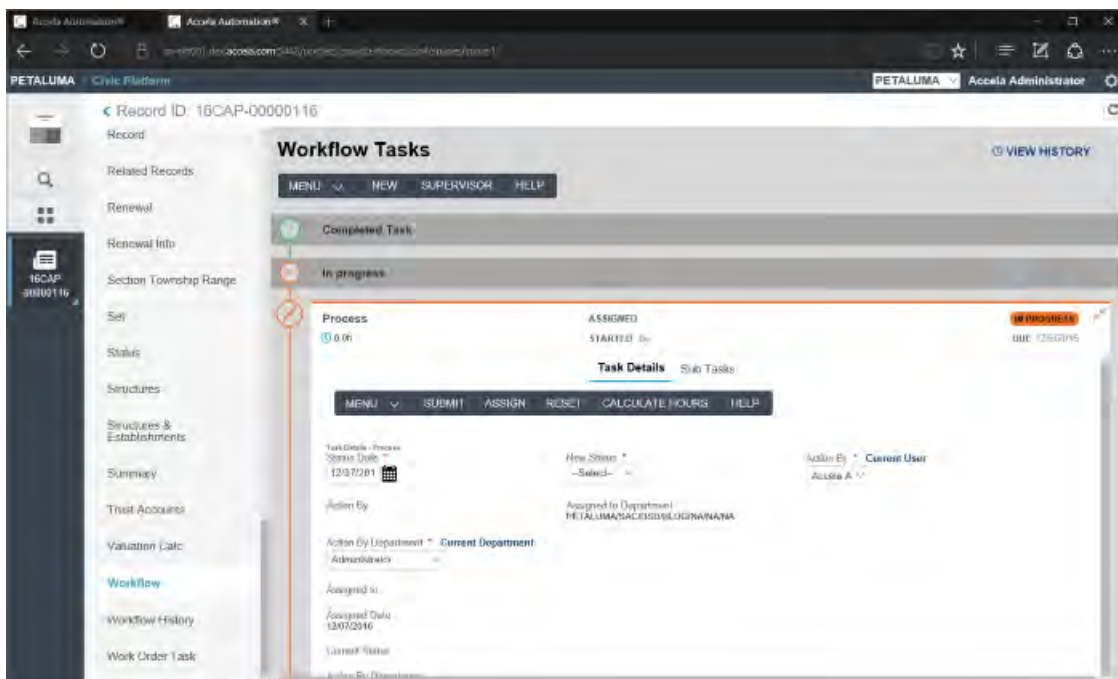
Each set of workflow tasks - **Completed**, **In Progress** and **Up Next**, can be collapsed in order to help the user focus on a specific task or set of tasks. The **Completed** and **Up Next** tasks will be collapsed by default. Users can quickly expand collapsed task sets and then expand the individual tasks that are

most pertinent to their jobs. This puts important information, such as Task-specific information (TSI) or ad hoc processes, at the user's fingertips without presenting an overly detailed and distracting view of the entire workflow process.



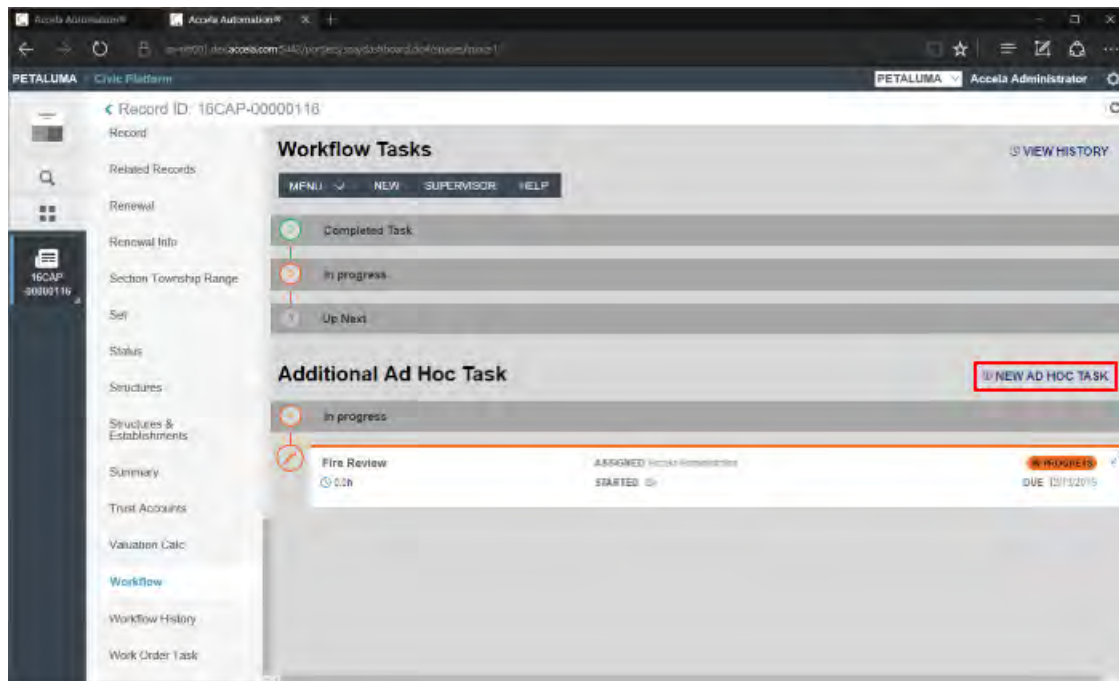
- To view task details, click an active task or the pencil icon next to the workflow task. Only active task details are viewable.

Civic Platform displays the detail card view for the selected task. The Workflow Tasks detail card view allows users to see or edit the detailed step information that is pertinent to a specific workflow task so they can track, update and move an application forward.



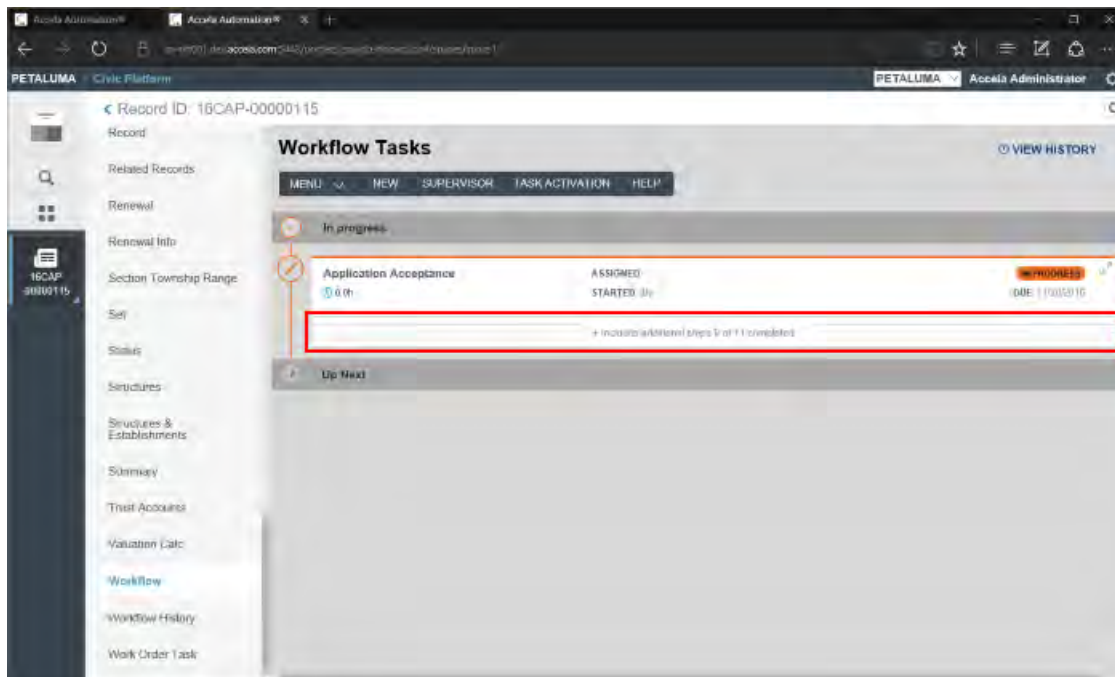
From the Workflow tab, ad hoc workflow tasks can be added by clicking **New** on the Workflow Tasks menu. (Alternatively, click the **New Ad Hoc Task** link if ad hoc tasks already exist.) Ad hoc tasks will be

displayed in the same manner, with Completed and In Progress tasks grouped together so they can be quickly collapsed or expanded.

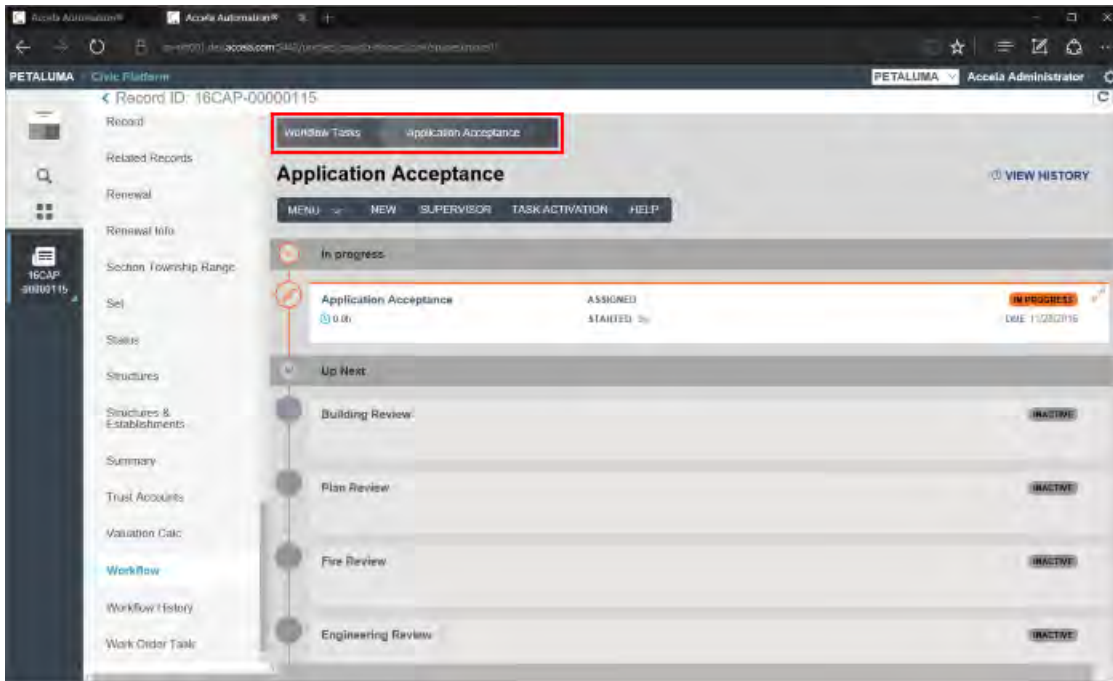


## Accessing Sub-Tasks within the Workflow Tab

If a workflow task has been set up on the workflow to include sub tasks, they can be accessed by clicking the collapsed Sub-Task area on the parent task.



Sub-tasks are displayed just like standard tasks, with **Completed**, **In Progress** and **Up Next** task sets. To return to the parent task, click the Workflow Tasks breadcrumb link at the top of the page.



Documents attached to a workflow task via the Electronic Document Review functionality are listed in a Sub Tasks tab on the Workflow page. Reviewers can interact with the document review sub-tasks from the Workflow page, from the Documents tab, or from their My Tasks portlets.

#### To access the document review sub-tasks a workflow task

1. From the desired portlet (for example, the Building portlet or the Service Requests portlet), locate and open the record you want to work with.  
See [Performing a Portlet Search](#) for instructions on locating a record.
2. In the record details, navigate to the Workflow tab.
3. Click the Sub Tasks tab on the Workflow page to view any documents assigned for review to the current workflow task.
4. You can interact with the document review task details via the Action menu. See [Electronic Document Review](#) for information about interacting with documents needing review.

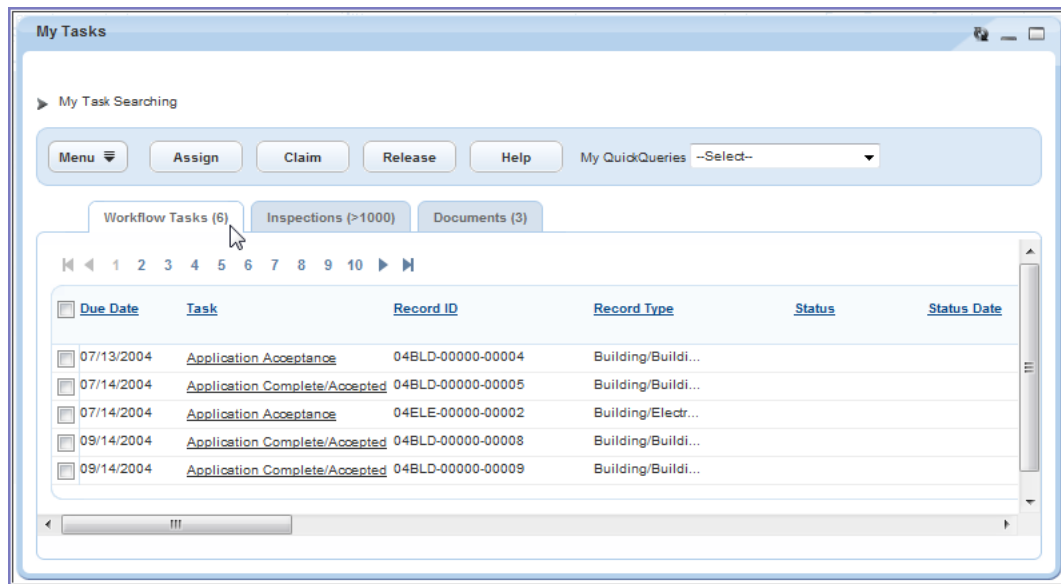
#### Accessing Tasks from the My Tasks Portlet

When you review tasks on the My Tasks portlet, it helps you understand what your workload is for a given time period. Knowing this enables you to better prioritize your time, and even reassign tasks if needed.

#### To access a task from the My Tasks portlet

1. Navigate to the My Tasks portlet on your console.  
Civic Platform displays a list of assigned tasks.
2. If not already displayed, click the Workflow Tasks tab.  
Civic Platform displays a list of workflow tasks assigned to you.





3. Locate the task you want to see. See [Filtering and Searching on the My Tasks Portlet](#).
4. To view task details, click the underlined task name of the desired task.  
Civic Platform opens the record for which the task is needed, and displays the Workflow tab with the selected task details displayed.

### Filtering and Searching on the My Tasks Portlet

You can filter the contents any or all of the tabs on your My Tasks portlet.

#### To filter tasks and inspections

1. Navigate to the My Tasks portlet.
2. Click the > **My Task Searching** link.  
Civic Platform displays a search form. You can search using record information, task information, or inspection information.
3. Enter search criteria in one or more fields. You can enter criteria in more than one group.  
For a description of the fields available, see [My Task Fields](#).
4. Click **Submit**.  
Civic Platform refreshes the Workflow Tasks tab and Inspections tab to display the search results.

### Resetting the My Tasks portlet lists

After applying filters, you can reset the My Tasks portlet to the original listing display.

#### To reset the My Tasks display

1. Navigate to the My Tasks portlet.
2. Click the > **My Task Searching** link.
3. Click **Reset**.
4. Click **Submit**.  
The Workflow Tasks and Inspection lists are restored to their original state.

## Accessing Tasks from the Task Management Portlet

### Topics

- [Finding Tasks](#)
- [Scheduling a New Inspection, Meeting, or Activity](#)
- [Processing Tasks](#)

## Finding Tasks

### To find a task

1. Access the Task Management portlet.
2. Click **Search**.  
Civic Platform displays the task search page.

The screenshot shows the 'Task Management' search interface. At the top, there are buttons for 'Menu', 'Submit', 'Reset', 'Cancel', and 'Help'. Below these are several search criteria fields: 'Task Name' (text input), 'Task Type' (dropdown menu with '--Select--'), 'Status' (text input), 'Start Date' (From/To date pickers), 'Assigned to Department' (Current Department dropdown), and 'Assign To Staff' (Current User dropdown). 'Due Date' (From/To date pickers) is also present at the bottom of the form.

3. Enter search criteria as available.
4. Click **Submit**.  
Civic Platform displays the list of tasks matching the search criteria.

## Scheduling a New Inspection, Meeting, or Activity

You can schedule inspections, meetings, and activities from the Task Management portlet.

### To create a new inspection, meeting, or activity

1. Access the Task Management portlet.
2. Hover over the **New** menu button to display a command list.

The screenshot shows the 'Task Management' portlet with the 'New' button highlighted. A dropdown menu is open, showing options for 'Inspection', 'Meeting', and 'Activity'. Below the menu, a table of tasks is visible with columns for 'Task Name', 'Task Type', and 'Alternate ID'. The table contains two rows of 'Doc review' tasks, both with 'MEETING' as the task type.

3. Select an option (inspection, meeting, or activity).
4. Follow the steps in the appropriate linked topic.

- Creating a new inspection (see [Working with Inspections](#) ).
- Creating a new meeting (see [Working with Meeting Calendars](#) ).
- Creating a new activity (see [Activities](#) ).

## Processing Tasks

You can perform actions on line items in the Task Management portal. The actions you can perform depend on the task type.

### To perform an action on a line item

1. Find the task you want to act on (see [Finding Tasks](#)).
2. In the Action column, click the triangle next to the task and select the action you want to perform.

Task Type	Available Actions
<b>Inspection</b>	Reschedule Inspection Result Inspection Cancel Inspection Delete
<b>Workflow Task</b>	Assign Claim Release
<b>Document Review</b>	Assign Download Preview Review View Doc Info
<b>Activity</b>	Delete
<b>Meeting</b>	Reject

3. Follow the instructions on the screen to complete the action.

## Working in the My Tasks Portlet

### Topics

- [My Tasks Overview](#)
- [Setting the Display Order of Tabs on My Tasks](#)
- [My Tasks Portlet Fields](#)
- [Workflow Task fields](#)

### My Tasks Overview

The My Tasks portlet provides you with access to workflow tasks, document review tasks, and/or inspections that have been assigned to you.

This portlet has three tabs:

- The Workflow Tasks tab displays tasks that have been assigned to you.
- The Inspections tab lists inspections that have been assigned to you.
- The Document Review Tasks tab lists documents that have been assigned to you for review.

### Setting the Display Order of Tabs on My Tasks

When the My Tasks portlet displays more than one tab, you can define which tab displays on top by default. For example, if you prefer to view your inspection workload first, you can set the display order to display the Inspections tab by default whenever you open the My Tasks portlet.

#### To set the tab display order

1. Navigate to the My Tasks portlet.
2. Hover on **Menu** to display a command menu, then choose **Display Order**.  
Civic Platform displays a display order form.

My Tasks Tab Name	Display Order
Workflow Tasks	1
Inspections	2

3. Enter **1** for the tab you want to display first. Enter **2** for the tab you want to display second.
4. Click **Save**.  
Civic Platform displays the My Tasks list portlet with the tabs in the assigned order.

## My Tasks Portlet Fields

The following table lists the fields you can use to filter the Workflow Tasks and Inspection lists on your My Tasks portlet. Fields are in alphabetical order by group.

Table 111: My Task Fields

<b>GENERAL</b>	
<b>Alternate ID</b>	Filter by alternate record ID (for agencies that use a numbering scheme different from Record ID (xxxxx-xx-xxxx)).
<b>Assigned to Department</b>	Filter tasks and inspections by department. Click Current Department to auto-populate the field with your name.
<b>Assigned to Staff</b>	Filter by responsible individual within a department. Click Current User to auto-populate the field with your name.
<b>City</b>	Filter by the city where the primary address is located.
<b>County</b>	Filter by the county where the primary address is located.
<b>Direction</b>	Filter by street direction. For example, N for north, as in North Broadway.
<b>Record ID</b>	Filter by unique record ID.
<b>Record Type</b>	Filter by record type.
<b>State</b>	Filter by the state where the primary address is located.
<b>Street</b>	Filter by street name (primary address associated with the record). This field supports wildcard searches.
<b>Street # (start) - Street # (end)</b>	Filter by a range of street numbers.
<b>Street Type</b>	Filter by street type, such as Street, Boulevard, or Lane.
<b>WORKFLOW TASK</b>	
<b>Action By (Dept.)</b>	Filter by the department that last updated the task status.
<b>Action by (Staff)</b>	Filter by the individual who last updated the task status.
<b>Assigned Date</b>	Filter by the date when the task assignment was made or changed.
<b>Assign Status</b>	Filter by assignment status.
<b>Due Date</b>	Filter by the due date for the task. You can specify a date range by using both the To and From fields.
<b>Duration (Days)</b>	Filter by the estimated number of days to complete this task.
<b>Module Name</b>	Filter by the module to which the task is related.
<b>Parent Task</b>	Filter by parent task (if any tasks in your current task list are sub-tasks of a parent).
<b>Status</b>	Filter by task status.
<b>Status Date</b>	Filter by the date when the task status last changed.
<b>Task</b>	Filter by task name.
<b>INSPECTION</b>	
<b>AM/PM</b>	Use in combination with Schedule Time to filter by inspection time.
<b>Billable</b>	Filter by inspections that are billable to the client.
<b>Created by ACA</b>	Filter inspections created via Citizen Access.
<b>GIS Area</b>	Filter by geographic area of the inspection.
<b>Inspection Date</b>	Filter by the date when inspections were completed.
<b>Inspection Sequence Number</b>	Filter by a unique inspection sequence number
<b>Inspection Type</b>	Filter by the type of inspection.

<b>Latitude</b>	Filter by the latitudinal coordinates of the inspection site.
<b>Longitude</b>	Filter by the longitudinal coordinates of the inspection site.
<b>Mileage (Start) Mileage (End)</b>	Filter by the starting/ending mileage on the odometer when travelling to an inspection site.
<b>Mileage (Total)</b>	Filter by the total number of miles required for an inspection.
<b>Request Date</b>	Filter by the date inspections were scheduled and submitted.
<b>Scheduled Date</b>	Filter by scheduled inspection date.
<b>Scheduled Time</b>	Use in combination with AM/PM to filter by inspection time.
<b>Status</b>	Filter by the current status of an inspection.
<b>Submit Date</b>	Filter by the date an inspection is submitted.
<b>Total Time</b>	Filter by the total number of hours required to complete an inspection.
<b>Vehicle ID</b>	Filter by the Vehicle ID number of the vehicle used to complete the inspection.
<b>DOCUMENT REVIEW</b>	
<b>Doc Name</b>	Filter by the name of the document.
<b>Category</b>	Filter by document category.
<b>Document Status</b>	Filter by the status for the document.
<b>Document Status Date</b>	Filter by the last date the document status was updated.
<b>Review Status</b>	Filter by the review status for the document.
<b>Review Status Date</b>	Filter by the last date the review status was updated.
<b>Reviewer</b>	Filter by the name of the assigned reviewer.
<b>Review Department</b>	Filter by the department where the assigned reviewer works.
<b>Task</b>	Filter by the workflow task name to which the document is attached.
<b>Task Status</b>	Filter by the status of the workflow task to which the document is attached.

## Workflow Task fields

The following table defines the default fields available the Workflow tab.

Table 112: Task Field Definitions

<b>Action By (Department)</b>	The name of the department that last updated the task status.
<b>Action By (Staff)</b>	The name of the individual who last updated the task status.
<b>Address</b>	The physical (street) address associated with the task.
<b>Application-Specific Information</b>	The Application-Specific Information (ASI) group associated to the task.
<b>Assigned Date</b>	The date when the task assignment was made or changed.
<b>Assigned To (Department)</b>	The department responsible for completing the current task.
<b>Assigned To (User)</b>	The user responsible for completing the current task.
<b>Assigned To (Staff)</b>	The individual currently responsible for completing the task.
<b>Comments</b>	Comments about the current status. Agencies with a second language configured will see a comments box for each language.
<b>Comment Display in ACA</b>	Activated when "Display Comment in ACA" is selected. Indicates who can view workflow task comments. Options include All ACA Users, Record Creator, Licensed Professional, Contact, and Owner.

<b>Current Status</b>	The current status of the task.
<b>Display E-mail Address in ACA</b>	Indicates whether or not public users can view an agency employee's email address from ACA.
<b>Due Date</b>	The date by which the task should be completed.
<b>Duration (Days)</b>	The estimated number of days necessary to complete a task. Your agency administrator defines this value.
<b>Estimated Hours</b>	The estimated hours necessary to complete this task. Your agency administrator determines this value. Only supervisors have the privilege to edit this value.
<b>Parent Task</b>	If the current task is a sub-task, this is a description of the parent task.
<b>Record Assigned to Department</b>	The department to which the record is assigned.
<b>Record Assigned to Staff</b>	The staff member to whom the record is assigned.
<b>Record By</b>	The person or department responsible for updating the task status.
<b>Record ID</b>	The unique ID number assigned to the record to which the task belongs.
<b>Record Status</b>	The status of the record.
<b>Record Type</b>	The type of record to which the task belongs.
<b>Short Notes</b>	A brief description of the record.
<b>Status Date</b>	The date when the task reached its current status.
<b>Task Name</b>	The name of the task. This field accommodates up to 100 characters.

## Ad Hoc Task Fields

The following table defines the fields that may be available when working with ad hoc tasks.

Table 113: Ad Hoc Task Fields

<b>Comments</b>	Comments about an ad hoc task.
<b>Days Active</b>	The number of days from the start date of the task to the current date of an active task.
<b>Department</b>	The department responsible for completing this task.
<b>Due Date</b>	The date that the task is to be completed.
<b>Duration (Days)</b>	The estimated number of days necessary to complete this task.
<b>Estimated Hours</b>	The estimated hours necessary to complete this task. Once saved, only supervisors have the privilege to edit the value.
<b>Staff</b>	The staff member responsible for this task.
<b>Task Description</b>	A description of the ad hoc task that corresponds with the task name.
<b>Task Name</b>	The name of the ad hoc task.

## Working with Workflows and Workflow Tasks

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Select from the list of processes below to see how you can work with workflows, workflow tasks, and the My Tasks portlet.

### Topics

- [Assigning and Reassigning Workflow Tasks](#)
- [Updating a Task](#)
- [Deleting and Reassigning a Workflow](#)
- [Reviewing Workflow History](#)
- [Deleting a Workflow History](#)
- [Working with Ad Hoc Tasks](#)
- [Activating Tasks](#)
- [Overriding a Workflow Process](#)
- [Attaching a File to a Workflow](#)
- [Querying an ASI Group Field](#)
- [Managing Inspections in My Tasks](#)
- [Managing Document Review in My Tasks](#)

### Assigning and Reassigning Workflow Tasks

Workflow tasks can be assigned and reassigned from the My Tasks portlet.

- [To assign or reassign workflow tasks](#)
- [To claim a task for yourself](#)
- [To release a task from your queue](#)

#### To assign or reassign workflow tasks

1. Navigate to the My Tasks portlet.
2. Select the Workflow Tasks tab.
3. Locate the workflow task(s) you want to assign. Use search if needed.
4. Select the workflow task(s) you want to assign/reassign.
5. Click **Assign**.  
Civic Platform displays the Assign Task form.



6. Populate the fields as described below.

- |                          |  |
|--------------------------|--|
| <b>Department</b>        | Choose the department you want to assign the task to. Click the <a href="#">Current Department</a> link to choose your department.   |
| <b>Workflow Calendar</b> | Choose a workflow calendar.  |
| <b>Staff</b>             | Choose the individual you want to assign the workflow task to. Available options are dependent on your Department selection. Click the <a href="#">Current User</a> link to choose yourself. |
| <b>Due Date</b>          | Use the picker to select the due date for the task.  |

7. Click **Submit**.

Civic Platform updates the selected workflow tasks.

**To claim a task for yourself**

1. Navigate to the My Tasks portlet.
2. Select the Workflow Tasks tab.
3. Locate and select the workflow task(s) you want to claim.
4. Click **Claim**.

Civic Platform assigns the indicated assignment changes to your queue.

**To release a task from your queue**

1. Navigate to the My Tasks portlet.
2. Select the Workflow Tasks tab.
3. Locate and select the workflow task(s) you want to release.
4. Click **Release**.

Civic Platform removes the task from your queue into the unassigned queue.

**Updating a Task**

If a task is assigned to you, you can edit ongoing task details such as status, responsible department, and staff members, and you can add information or instructions as needed.

## To update a task

1. Locate the workflow you want to update, either from the Workflow Tasks tab on the My Tasks portlet or from the applicable record portlet.

See [Accessing and Viewing Tasks](#) for instructions.

<input type="checkbox"/>	Due Date	Task	Record ID	Record Type	Status	Status Date	Comments
<input type="checkbox"/>	01/14/2013	<a href="#">BLD Development Engineering -2</a>	13CAP-00000-000A5	Building/linda/...	Meeting	01/18/2013	
<input type="checkbox"/>	01/14/2013	<a href="#">Application Acceptance</a>	12BCM-00000-01565	Building/Commer...			
<input type="checkbox"/>	01/17/2013	<a href="#">BLD Admin</a>	13CAP-00000-000C8	Building/linda/...	Meeting	01/22/2013	
<input type="checkbox"/>	01/18/2013	<a href="#">Building Review</a>	13CAP-00000-000JT	Building/linda/...			
<input type="checkbox"/>	01/19/2013	<a href="#">Building Review</a>	13CAP-00000-000KS	Building/linda/...		01/19/2013	update by supervisor
<input type="checkbox"/>	01/19/2013	<a href="#">BLD Mechanical -1</a>	13CAP-00000-000JY	Building/linda/...			
<input type="checkbox"/>	01/20/2013	<a href="#">BLD Issued -1</a>	13CAP-00000-000JZ	Building/linda/...	No Change		

2. With the Workflow tab displayed, identify the task to be updated in the task hierarchy on the left side of the display. If necessary, click the plus (+) sign to expand folders and reveal additional tasks.

Active tasks display in red. Completed tasks display in black.

3. Click the link for the workflow task in red.

Civic Platform displays the workflow task details and if applicable, task specific information.

Building Permit ID: 13CAP-00000361

Menu Submit Assign Reset Calculate Hours Cancel Help

Task Details Sub Tasks (0)

**Workflow Tasks**

- [Application Acceptance](#)
- Building Review
- Plan Review
- Fire Review
- Engineering Review
- Environmental Review
- Overall Plan Check
- Permit Issuance
- Inspection
- Certificate of Occupancy
- Closure

**Ad Hoc Tasks**

- [BLD Development Engineering - 2](#)
- [BLD Admin](#)
- [BLD Admin - 1](#)
- [IT ADM](#)
- [IT BLD - 1](#)
- [IT OTH](#)

**Task Details - Review Begin**

Assigned Date: 01/11/2013  
Assigned to Department: Fire  
Current Status: **Review Begin**

Action By \* **Current User**: Admin User  
Due Date: 01/11/2013

End Time: [ ] : [ ]  
 Overtime  
In Possession Time (hrs): [ ]

Due Date: 01/11/2013  
Action By Department: Fire  
Status Date: [ ]  
New Status \* : --Select--  
Comments: [ ]  
 Standard Comment  
 check spelling

Assigned to: CDD-Administration  
Action By: [ ]  
Action By Department \* **Current Department**: CDD-Administration  
Status Date \* : 02/14/2013  
Start Time: [ ]

Hours Spent: [ ]  Billable  
Time Tracking Start Date: [ ] Est. Completion Date: [ ]  
 Display Comment in ACA  
Comment Display in ACA:  
 All ACA Users  
 Record Creator  
 Licensed Professional  
 Contact  
 Owner

Display E-mail Address in ACA Estimated Hours: 0.0

Time spent on task [Add entry](#)  
Total: 0 hours 0 mins

User ID	Duration	Start Time	End Time	Group	Type
0 record(s) found.					

[Add another entry](#)

4. Modify the task details as needed. For descriptions of the fields, see [Task Field Definitions](#).

5. Click **Submit**.

## Deleting and Reassigning a Workflow

Your system may be configured to enable some users to delete the current workflow from an existing record and replace it with another workflow using the **Delete & Assign Workflow** command.

### To delete and reassign a workflow

1. From the desired portlet, locate and open the record with the workflow you want to replace.  
See [Performing a Portlet Search](#) for instructions on locating a record.
2. In the record details, click the Workflow tab.  
Civic Platform displays the current workflow task list for the record.
3. Hover your mouse on the **Menu** button and then select **Delete & Assign Workflow** from the drop-down list.

The Delete & Assign Workflow form displays.

4. If you want to keep a read-only version of the old workflow history when you replace the workflow, choose **Yes** in the **Delete Workflow History** field. Otherwise, choose **No**.



#### Note:

You may be required to enter a comment explaining the reason for the deletion/reassignment before it can take place.

If you choose **No**, you can always delete individual workflow history items as needed later. See [Deleting a Workflow History](#) for more information.

5. Choose a new workflow from the **New Workflow** drop-down list and click **Submit**.

## Reviewing Workflow History

Workflow history provides a record of workflow task update actions. It shows the past statuses of each task in the workflow history as well as the user who updated the status and when it was updated. For example, it may show that an inspection, building review, or service request was rejected on a certain date and is now pending.

### To review workflow history

1. Use Search to locate the record you want to work with.
2. Click the link for the record you want to work with in the Record ID column.  
Civic Platform displays the record details.

### 3. Navigate to the Workflow History tab.

Civic Platform displays the workflow history. Active tasks are listed first.

<input type="checkbox"/>	Task	Status	Status Date	Action By	Record Date/Time
<input type="checkbox"/>	<a href="#">Ticket review</a>	Information only	08/14/2012	Deyette K...	08/14/2012 03:14:14
<input type="checkbox"/>	<a href="#">Ready for review</a>	Jurisdiction review	08/14/2012		08/14/2012 03:12:52
<input type="checkbox"/>	<a href="#">Ticket review</a>	Resolution ready for testing	08/14/2012	Chrissie ...	08/14/2012 03:12:35
<input type="checkbox"/>	<a href="#">Ticket review</a>	Ticket submitted	08/14/2012	Debbie Wells	08/14/2012 03:10:49

### 4. Click the link to the task you want to review.

Civic Platform displays the details of the task.



#### Note:

Depending on your agency's settings, the task details may be read-only.

## Deleting a Workflow History

You can delete workflow history by locating the specific record and then using the Workflow History tab.

### To delete a workflow

1. Navigate to the Building portlet and use Search to locate the record you want to work with.
2. Click the link for the record you want to work with in the Record ID column.  
Civic Platform displays the record details.
3. Click the Workflow tab.  
Civic Platform displays a workflow hierarchy of the processes and tasks prescribed for the record.
4. Select each task you want to delete.
5. Click **Delete**.



#### Note:

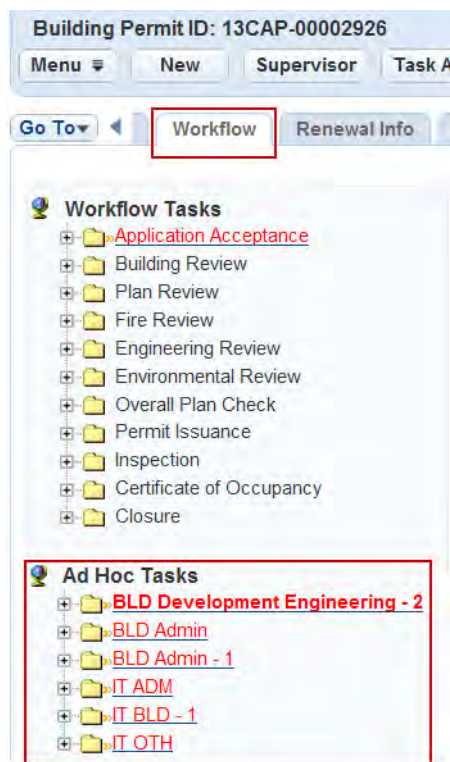
You may be required to enter a comment explaining the reason for the deletion before it can take place.

The task items you selected are removed from the list of Workflow History for that record.

## Working with Ad Hoc Tasks

Ad hoc tasks are useful when you need to keep a record of unplanned or immediate tasks that affect the record. For example, you may need to schedule a review meeting to discuss unexpected changes. Ad hoc tasks do not interrupt the standard workflow for a record, nor do they change the workflow templates that your agency administrator has established.

Ad hoc tasks display separately in the Workflow portlet as shown below.



## Creating an Ad Hoc Task

Your agency administrator has already defined the types of ad hoc tasks that you can choose from. If you do not see the type of ad hoc task that you need, talk with your agency administrator about setting it up. After you create the ad hoc task, you can assign it to a department or individual.



### Note:

When an ad hoc task is added to a record workflow, this action (along with any comments entered) is logged in the Workflow History and Workflow History Audit Logs.

### To create an ad hoc task

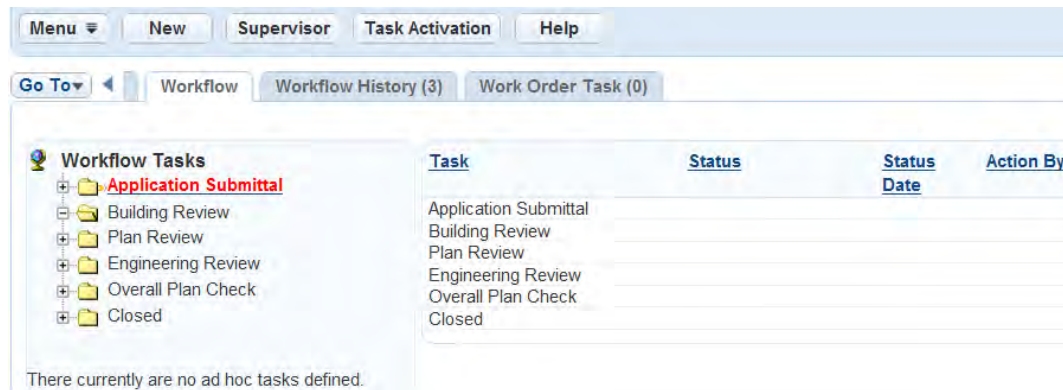
1. Use search to locate the record you want to work with.
2. Click the link for the record you want to work with in the Record ID column.  
Civic Platform displays the record details.
3. Click the Workflow tab.  
Civic Platform displays the workflow hierarchy.
4. Click **New**.  
Civic Platform displays a blank form.
5. Complete the form with available data.  
For a description of the fields, see [Ad Hoc Task Fields](#).
6. Click **Submit**.

## Activating Tasks

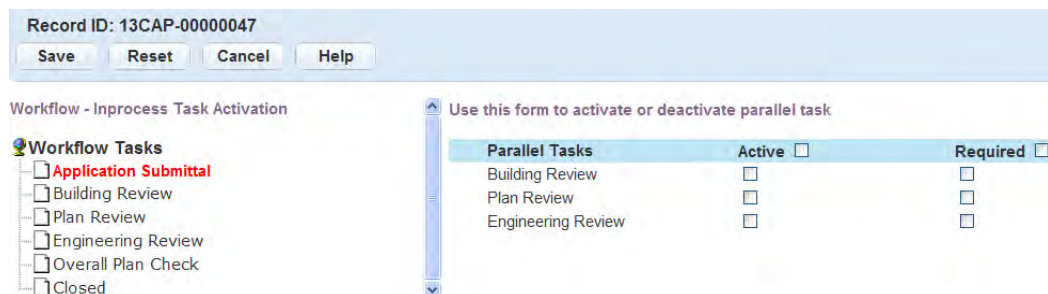
If your administrator activates this feature, you can activate or deactivate tasks, as well as change optional tasks to required tasks.

### To activate tasks

1. Navigate to the Building portlet and use Search to locate the record you want to work with.
2. Click the link for the record you want to work with in the Record ID column.  
Civic Platform displays the record details.
3. Click the Workflow tab.  
Civic Platform displays a workflow hierarchy of the processes and tasks prescribed for the record.



4. Click the **Task Activation**.  
Civic Platform displays the Task Activation portlet.



5. From the Workflow Tasks tree on the left, select the task you want to work with.
6. Select **Active** and/or **Required** as needed for the parallel tasks you want to activate/set to required.  
To set all parallel tasks to active and/or required, select **Active** and/or **Required** in the Parallel Tasks header.
7. Click **Submit**.  
Civic Platform changes the status the tasks as you indicated.

## Overriding a Workflow Process

Users with sufficient access (for example, supervisors) can alter the current status of tasks in a workflow process. They can return completed tasks to previous levels, or complete tasks that are not yet active.



### Note:

This function should be used with extreme caution. If done incorrectly, the normal workflow could be disrupted. Contact Civic Platform Implementation staff for further information.

### To override a workflow process

1. Use search to locate the record you want to work with.
2. Click the link for the record you want to work with in the Record ID column.  
Civic Platform displays the record details.
3. Click the Workflow tab.  
Civic Platform displays a workflow hierarchy of the processes and tasks prescribed for the record.
4. Click **Supervisor**. The button is available only if you have supervisory privileges.  
Civic Platform displays the Workflow - Task Supervisor list portlet.
5. Select the workflow task from the list.  
Civic Platform displays the details for the chosen task in the detail form portlet.
6. Modify the task details as needed (see [Task Field Definitions](#) and [Ad Hoc Task Fields](#) for field definitions).
7. Click **Submit**.

### Attaching a File to a Workflow

You can attach files to a workflow by uploading them from your computer to Civic Platform. You may also link to an existing attachment that has already been uploaded and attached to another asset or work order. See [Attaching Files](#) for more information.

### Querying an ASI Group Field

You can create a query that filters Application-Specific Information (ASI) group fields in the My Tasks portlet. QuickQueries are generally simple to create, but you must refine your filter parameters when querying the ASI group field. Otherwise, the list of returned records is too long and can affect system performance. See [Understanding QuickQueries](#) for more information about QuickQueries.

Before you create an ASI group QuickQuery, talk to your agency administrator to get the correct ASI group and subgroup information for the task set you want to view.

#### To query the ASI group field

1. Navigate to the My Tasks portlet.  
Civic Platform displays a list of assigned tasks.
2. Hover on **Menu** to display a command menu, then choose **My QuickQueries** from the drop-down list.  
Civic Platform displays a list of QuickQueries associated with the list in primary portlet
3. Click **New**.  
Civic Platform displays the Create QuickQueries form.

The screenshot shows the 'Create QuickQueries' form. At the top, there is a toolbar with buttons: Submit, Reset, New Field, Delete Field, Preview SQL, Cancel, and Help. Below the toolbar, there are two input fields: 'Name' and 'Description'. To the right of the 'Description' field is a 'Primary' dropdown menu with 'No' selected. Below these fields is a 'Search By' section. It starts with a checkbox, followed by a dropdown menu showing '--Select--', an equals sign operator, another dropdown menu, and an 'AND' dropdown menu. At the bottom of the form is a large text area labeled 'Resulting Query'.

4. Complete one or more of these fields:

- Name** Identifies the QuickQuery.
- Description** A description that defines the purpose of the QuickQuery.
- Primary** Defines whether a QuickQuery is the primary query for the list portlet. A primary QuickQuery is applied to the list portlet automatically each time you navigate to it. Only one QuickQuery can be primary at any given time. If one QuickQuery is designated as the primary, all other queries automatically reset to “No” for this field.

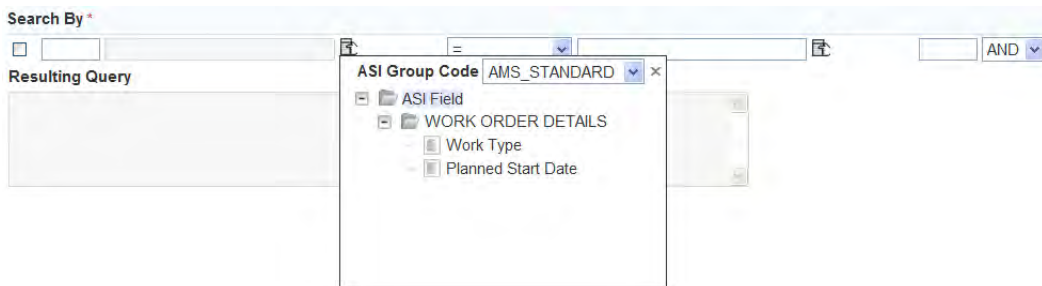
5. In the Search By section, select **Application Specific Info** either from the drop-down list or by clicking the Data Picker button to the right.

Civic Platform displays a ASI Group Code information list.



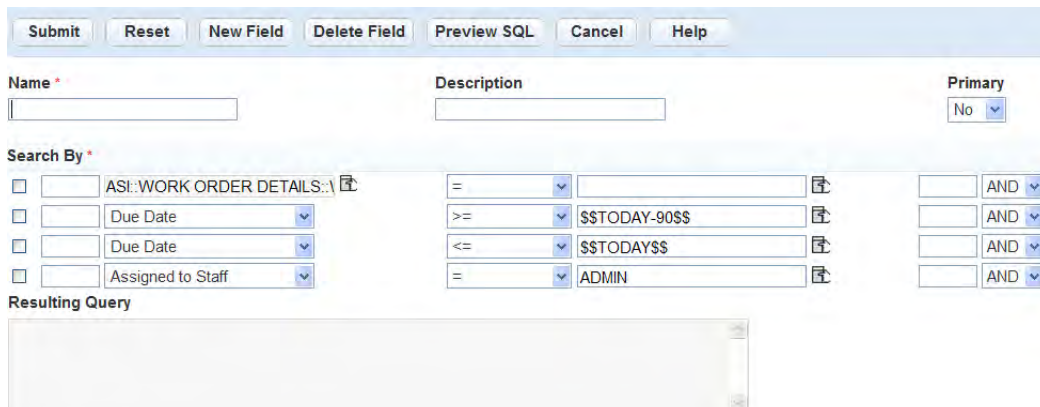
6. Select the ASI Group you want to use in your query.

Civic Platform displays the subgroups contained in the ASI group and the fields included in each subgroup.



7. Select a field from one of the subgroups. You can select only one field at a time.

Civic Platform adds the field to the query, along with additional fields.



8. Enter the desired value for the ASI field. The value must match a value in your agency’s database.

Use the Variable picker button to the right of the field to select a variable or enter the desired value into the field manually.



If you are querying a check box, the valid values are CHECKED and blank (no value).

If you are querying a radio button, the valid values are **Yes** and **No**.

Name *	Description	Primary
<input type="text"/>	<input type="text"/>	No

Search By *	Operator	Value	Connector
<input type="checkbox"/> ASI:WORK ORDER DETAILS	=	CHECK	AND
<input type="checkbox"/> Due Date	>=	\$\$TODAY-90\$\$	AND
<input type="checkbox"/> Due Date	<=	\$\$TODAY\$\$	AND
<input type="checkbox"/> Assigned to Staff	=	ADMIN	AND

Resulting Query

9. When you query an ASI field, it is a good idea to refine your search further. For example, you can query ASI fields for tasks within a due date range, for tasks assigned to a designated staff member, or for both.

Complete the following query parameter fields:

- Due Date, >=**                      The beginning date of the date range you want to view.
- Due Date, <=**                      The end date of the date range you want to view.
- Assigned to Staff, =**                Enter a valid user ID.

To add further fields to your query, see [Understanding QuickQueries](#) .

#### 10. Click **Submit**.

Civic Platform informs you if you created the query successfully and updates the query list.

## Managing Inspections in My Tasks

You can view and manage inspections from the Inspections tab in the My Tasks portlet. Supervisors can view all inspections assigned to the department, or filter the inspections to view those assigned to a certain user. Non-supervisor users can view inspections assigned to themselves. The information displayed and the options available in this tab are the same as those displayed in the Inspections portlet, such as scheduling and rescheduling inspections. For more information about managing inspections, see [Inspections](#) .

The benefit of the Inspections tab in the My Tasks portlet is that you can filter all the workflow tasks and inspections separately or at the same time. This could help you narrow the search for all workflow tasks and inspections you want to reassign. For example, if John Q Smith has inspections due today but called in sick, you can filter the inspections by choosing his name in the Assigned to Staff drop-down list, choosing the Assigned option in the Assigned Status drop-down list, and selecting the current day. Civic Platform filters the inspections and workflow tasks to display only those assigned to John Q Smith.

This option is set by your agency. If you do not see the Inspections tab in the My Tasks portlet, contact your agency administrator.

## Managing Document Review in My Tasks

You can access documents assigned to you to review from the Document Review Tasks tab on the My Tasks portlet. Use the My Tasks Searching tools to find a particular document or use the columnar sort capabilities to organize the documents in your queue to your liking. An Action menu is available for each document that enables you to interact with the documents from the My Tasks portlet. For information

about document review, see [Electronic Document Review](#) . For additional information about working with attachments, see [Attachments](#) .

## Work Orders

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Choose a topic from the list below to learn more about working with work orders.

### **Related Information**

[Work Order Overview](#)

[Managing Work Orders](#)

[Managing Work Order Tasks](#)

[Running a Report](#)

[Cloning a Work Order](#)

[Managing Work Order Assignments and Costs](#)

[Viewing the Work Order Calendar](#)

[Managing Work Order Assets](#)

[Managing Work Order Parts](#)

[Tracking Work Order Production](#)

[Examining Work Order Details](#)

## Work Order Overview

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A work order is a record or a request to perform a task, such as servicing all line hydrants. Many work orders have associated information that can include address information, costing information, related assets, associated documents or pictures, inspections, and parts. In addition, your agency has a geographic information system (Civic Platform GIS), you can use it to locate addresses of work orders and locate trends on a map.

**Example:**

Suppose several fire hydrants in a neighborhood need to be serviced next month. You can create a work order for one of the fire hydrants and use that work order as a template for the rest of the hydrants. You start by searching for the hydrant on the Asset portlet and copying the fire hydrant data, including the address, to your new work order. You can also add parts associated to the asset to the work order along associated part data. If desired, you can attach a PDF schematic of the fire hydrant. When the work order is complete, you can use it as a template to create work orders for each fire hydrant, changing the asset and address information. When the maintenance is completed, an inspector can reference the work order as he confirms that the maintenance was performed correctly and that the hydrants are working according to specifications.

## Managing Work Orders

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Once work order records are created, they can be edited and updated individually or in batches. You can also print work orders to provide hard copies for field workers, copy information from an existing work order to another work order or Set, and attach different file types as needed.

### Topics

- [Creating a Work Order](#)
- [Viewing and Updating Work Orders](#)
- [Using Group Update for Multiple Work Orders](#)
- [Printing a Work Order](#)
- [Managing Related Work Orders](#)

### Creating a Work Order

You can either create work orders individually for an existing asset, or you can batch create them by setting up Preventive Maintenance (PM) schedules.

There are two options for creating individual work orders:

- The application intake form allows you to view many fields when creating, editing, or reviewing an application or service request. It combines the information from many of the tabs associated with a record.
- The single portlet entry and review form is organized into sections that correspond with record detail tabs.

If your agency has Accela GIS, you can also use it to create work orders. An advantage to this is the ability to create multiple work orders for multiple assets at one time. It also provides a visual of the assets and their location.

For information about creating preventive maintenance (PM) schedules which enable your agency to schedule specific preventative maintenance tasks for an asset, see [Preventative Maintenance Schedules](#).

If the type of work order has a primary work order template associated, the basic work order information defined in the primary template is automatically populated into the Assigned to Department, Assigned to Staff, Description, Work Order Type and Priority fields on the work order form during work order creation. After the work order is submitted, the cost items, parts, and work order tasks within the primary template are automatically associated with the work order and are shown under the corresponding tab.

### Topics

- [Creating a Work Order via the Application Intake Form](#)
- [Creating a Single Work Order](#)
- [Creating Work Orders via Accela GIS](#)
- [Creating a Work Order from an Asset List](#)

### Creating a Work Order via the Application Intake Form

Creating a work order via an intake form can be convenient because all of the fields needed to create a work order are located on one form instead being distributed across multiple tabs. Fields may be sorted into sections.

**To create a work order via an intake form**

1. Navigate to the Work Orders portlet.  
Civic Platform displays a list of work orders.
2. Click **New**.  
Civic Platform displays the work order details in a new window.
3. Define the type of work order that you want to create by completing the Group, Type, Subtype, and Category fields.
4. Click **Submit**.  
Civic Platform displays a work order form.
5. Complete the fields with available data. See [Work Order Fields](#) for field definitions.
6. Do one of the following.
  - Use Search to find and associate an asset.
    1. Click **Search**.  
Civic Platform displays an Asset Search page in a pop-up window.
    2. Enter search criteria as appropriate.
    3. Click **Submit**.  
Civic Platform displays the search results.
    4. Select the asset(s) you want to attach to the work order and click **Select**.  
Civic Platform attaches the asset(s) to the work order.
  - Use the **GIS**map system to locate and associate an asset.
    1. Click **GIS**.  
Civic Platform generates the GIS map view.
    2. Use the **GIS** toolbar and map to select a group of assets  
Civic Platform displays results in the Selected Objects list.
    3. Select the item(s) to add to the work order.
    4. Choose **Link Objects to Work Order** from the drop-down list
    5. Click **Submit**.  
Civic Platform attaches the asset(s) to the work order.
  - Use **Delete** to remove an asset from a work order
    1. Select the asset(s) to be removed from the work order.
    2. Click **Delete**.
7. Click **Validate** to validate the fields in the work order. You may skip this step and click **Submit** directly.  
Civic Platform still performs validation before submitting the work order.

**Note:**

If a work order is associated with an asset that has active conditions, a Condition Notice window displays, listing all the active conditions for the asset. If the severity of an active condition = Lock, validation fails. See [Conditions](#) for more information.

**8. Click Submit.**

Civic Platform returns to the work order list portlet, and updates the work order record detail tabs.

**Creating a Single Work Order**

You can create single work orders using the New Work Order (Record) by Single form. This is a template that often minimizes the data required for the work order, bypassing the extensive data entry process of the permit intake form. The New Work Order (Record) by Single form can be used from the work order list portlet or from Accela GIS. For more information on how to create a work order using GIS, see [Creating Work Orders via Accela GIS](#).

**To create a single work order****1. Go to the Work Orders portlet.**

Civic Platform displays a list of work orders.

**2. Click Create by Form.**

Civic Platform displays the work order template selection portlet in a new window.

**3. Choose the type of work order you want to create by selecting an option from the Work Order Template or Work Order Type drop-down list.**

Civic Platform displays the New Work Order (Record) by Single Form.

**4. Complete the fields with available data. See [Work Order Fields](#) for field definitions.****5. Click Submit.****Creating Work Orders via Accela GIS**

Accela GIS can be an efficient vehicle for creating work orders. Instead of searching and selecting each individual asset and linking them to each individual work order, Accela Silverlight GIS allows you to select an area within the map viewer and display all assets in that location, providing not only a visual of the assets, but enabling you to automatically link a group of assets to a work order.

**To create a work order using GIS****1. Navigate to the Work Orders portlet.**

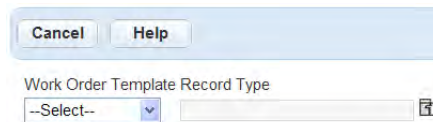
Civic Platform displays a list of work orders.

**2. Click GIS.**

Accela GIS map viewer displays.

**3. Using the Selection tool, select the objects you want to include in the work order.****4. From the GIS Data tab within the Select List tab, mark the check box for each item you want to link to a work order.**

5. Select either Create Single Work Order or Create Multiple Work Orders from the drop-down list.
6. Click **Submit**.  
Civic Platform displays the work order template selection portlet in a new window.



7. Choose the type of work order you want to create by selecting an option from the Work Order Template or Work Order Type drop-down list.  
Civic Platform displays the New Work Order (Record) by Single Form.
8. Complete the fields with available data. See [Work Order Fields](#) for field definitions.
9. Click **Submit**.  
Civic Platform creates the work order (provided all the work order fields pass validation)



**Note:**

If a work order is associated with an asset that has active conditions, a Condition Notice window displays, listing all the active conditions for the asset. If the severity of an active condition = Lock, validation fails. See [Applying Asset Conditions on Work Orders](#) for more information.

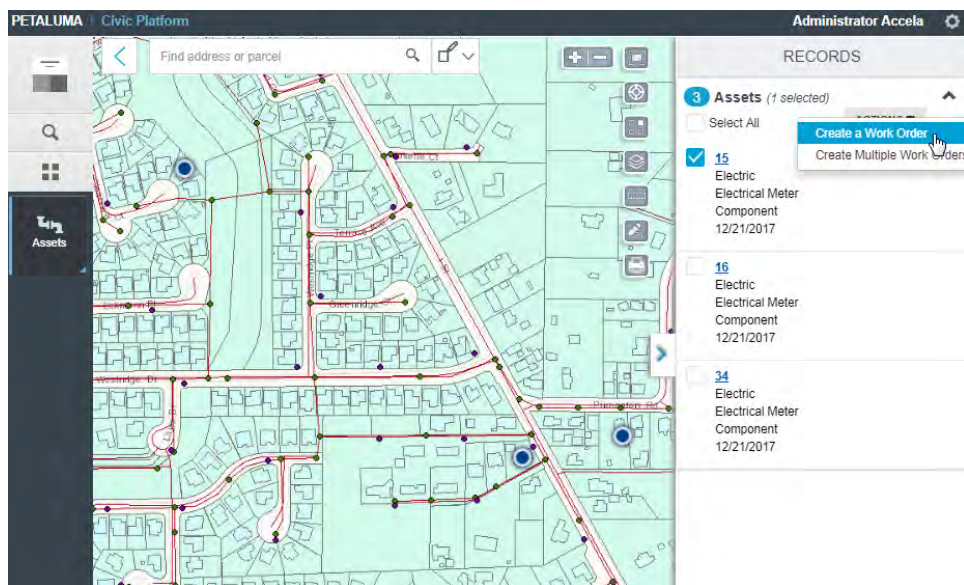
## Creating a Work Order from an Asset List

You can generate a work order from an asset list, enabling you to create a group work order for all chosen assets or create individual work orders for each item.

### To create a work order from an Asset List

1. Navigate to the Assets portlet.  
Civic Platform displays the Assets portlet.
2. Select the asset(s) you want to generate a work order for.
3. Click **New WO**.  
Civic Platform displays a message informing you that separate work orders will be created for each asset.
4. Optionally, click GIS (or Map) to plot the assets on a map.  
The map displays the selected assets, and lists them on the **Records** panel. To create work orders from the **Records** panel, select the assets you want to generate a work order, and choose **Create a Work Order** or **Create Multiple Work Orders** from the **Actions** menu. For example:





5. Do one of the following:

- If you selected only one asset, click **OK**.
- If you selected more than one asset and you want to generate individual work orders for each asset, click **OK**.
- If you selected more than one asset and you want to generate one work order for all assets, click **Cancel**.



**Note:** If you click the wrong button by mistake, click **Cancel** on the next page to begin again.

6. Choose the Work Order Template and Record Type from the drop-down lists.

Civic Platform displays the New Record by Single window.

7. Complete the fields with available data. See [Work Order Fields](#) for field definitions.

8. Verify that all assets are attached to the work order in the Assets section at the bottom of the page.

9. Click **Submit**.

Civic Platform validates the work order fields and creates the work order, provided the validation is successful.



**Note:**

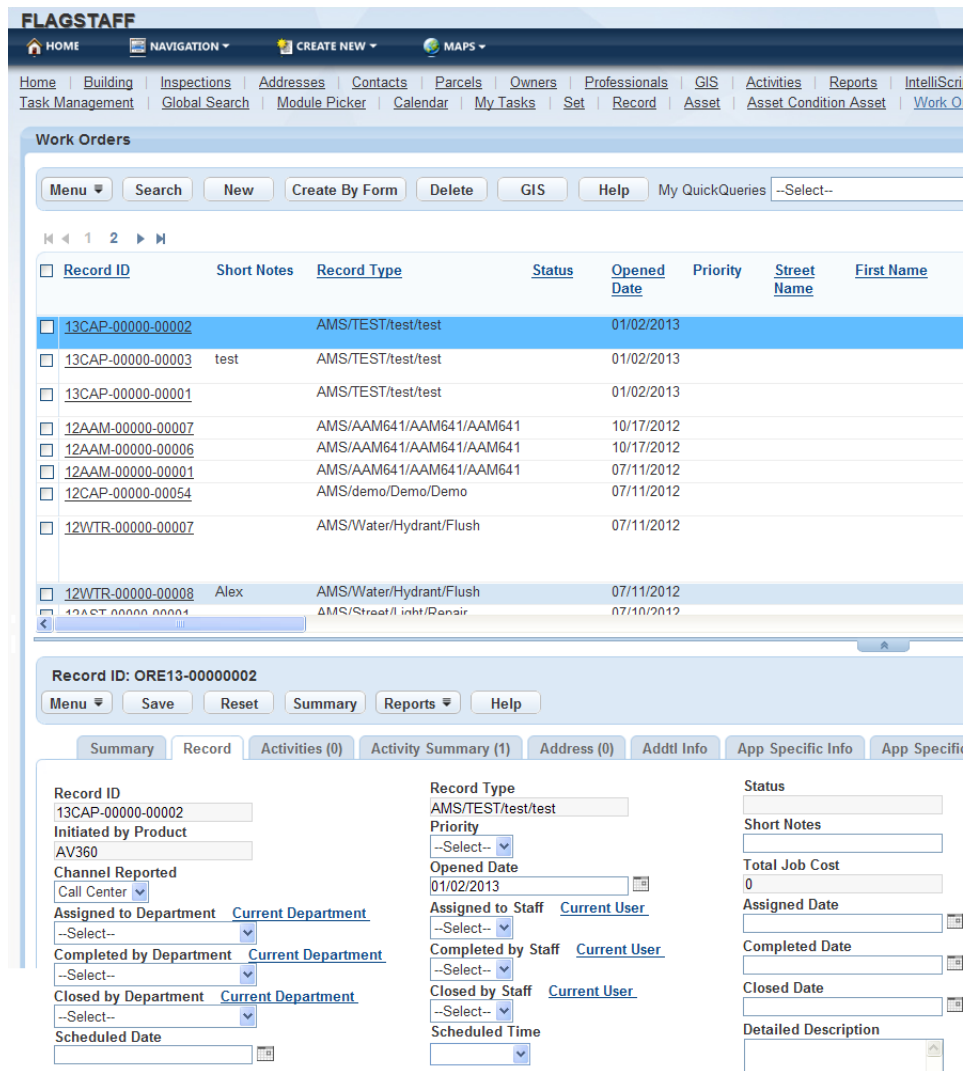
If a work order is associated with an asset that has active conditions, a Condition Notice window displays, listing all the active conditions for the asset. If the severity of an active condition = Lock, validation fails. See [Applying Asset Conditions on Work Orders](#) for more information.

10. Click one of the asset IDs from the asset list associated with the new work order.

The Work Order tab displays the updated work order information.

## Viewing and Updating Work Orders

Users can view a list of work orders as well as a summary of individual work orders. [Work Order List and Detail Portlets](#), illustrates the work order list as well as the work order detail portlet that displays when a work order is selected from the list.



**Figure 35: Work Order List and Detail Portlets**

- A** Record ID Link. Click the Record ID link associated with the work order that you want to view.
- B** Record ID. When you click the Work Order ID in the Work Orders list portlet, Civic Platform displays the work order details on the tabs below.
- C** Record Detail tabs. Each of the tabs displays related or associated Work Order detail information.

**Topics**

- [Viewing and/or Updating a Work Order](#)
- [Viewing a Work Order Summary](#)
- [Viewing Work Order-Associated Data in GIS](#)

**Viewing and/or Updating a Work Order**

You can quickly access a list of work orders that you are responsible for and make changes as needed.

**To view and/or update work orders**

1. Navigate to the Work Orders portlet.

Civic Platform displays a list of all of the work orders currently assigned to you.

2. Apply a QuickQuery if needed. See [Understanding QuickQueries](#) for more information
3. Click an ID link to view work order details.  
Civic Platform displays the details on the Record tab. You can select different tabs to view various details.
4. If you want to update the work order, edit the data as needed. See [Work Order Fields](#) for field definitions.
5. Click **Submit**.  
Civic Platform saves your information and refreshes the work order list so that it reflects the changes.

## Viewing a Work Order Summary

After you create a work order, you can view a summary of major work order details.

### To view a work order summary

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to view.  
Civic Platform displays the details on the Record tab.
2. Click **Summary**.  
Civic Platform displays the work order summary.
3. If you want to update the work order, click the Work Order Detail tab and edit the data as needed. See [Work Order Fields](#) for field definitions.
4. Click **Submit**.  
Civic Platform saves your information and refreshes the work order list so that it reflects the changes.

## Viewing Work Order-Associated Data in GIS

Civic Platform allows you to view the related asset, address, and parcel information of some work orders in the GIS viewer, giving you the ability to create a useful map of relevant data. It also allows you to map work order histories to get a visual representation of asset, address, and parcel conditions.

For example, a user searches for all work orders for instances where high-pressure cleaning was performed over the past six months. The GIS system displays all the pipes that were associated to these work orders, giving you a broad idea of areas where pipe systems are performing poorly.

### To view work order-associated data in GIS

1. Navigate to the Work Orders portlet and use Search to identify the work orders you want to work with.  
Civic Platform displays a list of all of the work orders currently assigned to you.
2. Select the work order(s) you want to map in Accela GIS.
3. Click **GIS**.  
Civic Platform displays a map of the relevant area, and displays all assets, addresses, and parcels related to the selected work orders.

## Using Group Update for Multiple Work Orders

You can edit or update several work orders at the same time if they all require the same change. For example, if you complete many work orders in one day, you can add the same “completed” date to all the records using the Group Update function.

### To perform a group update

1. Navigate to the Work Order portlet and use Search to locate and select the work orders you want to update.
2. Hover over Menu to display a drop-down menu and then select Group Update.  
Civic Platform displays the work order detail fields available for group update.
3. Update data as necessary. See [Group Update Fields](#) for field definitions.
4. Click **Save**.  
Civic Platform saves your information and updates the work orders you selected with the information you entered.

## Printing a Work Order

You may print work order details or a work order list. For example, you may want a list of the work orders that you plan to work with today. You can search for the work orders and then print the list. Or you might print the work order details for a single work order if you are going off site to take care of some aspect of that work order.



### Note:

You must have installed Adobe Acrobat or Acrobat Reader in order to view and print. Civic Platform generates printable permits, licenses, applications, and service requests in PDF.

### To print a work order

1. Go to the Work Order portlet and use Search to locate the work order(s) that you want to print  
Civic Platform displays the work order details on the Record tabs.
2. To print the list of work orders, click Reports above the list.
3. To print work order details, click **Reports** above the record detail tabs.  
Civic Platform generates a PDF version of either the asset list or the asset details in a new browser window.
4. Use your browser’s print command to print the permit.  
Depending on what browser you use to view PDF files, you may have the option to save the permit PDF to your hard drive or send it as an email attachment.
5. To look up a work order ID, click Search and enter the desired fields.

## Managing Related Work Orders

There are three possible relationships between work orders: parent, child, or sibling. The parent work order is the primary work order, and other work orders are identified in relation to the parent. The parent is easily identified as it has a global icon next to it in the work order list. A child work order is a step down from the parent and is identified by a check box next to it. When there are many child work orders attached to a parent, the relationship of one child work order to another is known as a sibling relationship.

The relationship of a work order is determined when a work order or many work orders are copied. The source or initial work order is the parent and the target work order is the child. When more than one work

order is copied from a source parent, this creates the sibling relationship. To view the work orders, select the parent work order, then select the related work orders record tab. From the list all child work orders can be viewed along with the parent. To activate a child work order, select the desired work order from the list. In order to create a parent/child/sibling relationship between work orders, you need to copy data from at least one existing (parent) work order to another (child/sibling) work order.

## Topics

- [Copying Work Order Data to Existing Work Orders](#)
- [Viewing and Activating Related Work Orders](#)
- [Removing Related Work Order Relationships](#)

## Copying Work Order Data to Existing Work Orders

You can copy any data collected on an existing work order to one or more existing work orders, including Fee items, Workflow status, Inspections, Application-specific information, Workflow-task-specific information, Parcel information, People information, and Conditions.


For example, a work order may list the same owner, contact, and licensed professional information as another work order entered into Civic Platform. To save data entry time, you can use this copy function to copy data from one existing work order to another. Once copied, you can modify and update the data in the new work order.


### To copy data from one work order to another

1. Find the existing work order(s) you want to copy.  
To look up the work order ID(s), click **Search**.
2. Navigate to the Record tab.  
Civic Platform displays the work order details.
3. Hover on the **Menu** button to display a command menu, then select **Copy**.  
Civic Platform displays the Copy to Application and Copy to a Set page.

Record ID: ORE13-00000002

Submit    Reset    Cancel    Help

Copy To Record:  

Copy To A Set:  

**Record Type - Specific Information:**

Fee Items

Workflow Status

Inspection [\(Select\)](#)

App Specific Info [\(Select\)](#)

Additional Info

Valuation Calc

Workflow Task Specific Information

Status or New Status:

Status History

**General Record Information:**

Parcel

Owner

Address

Structure

Licensed Professionals

Contact

Document

Record Conditions [\(Select\)](#)

Inspection Conditions [\(Select\)](#)

Conditions of Approval [\(Select\)](#)

Education

Continuing Education

Examination

4. Enter the new work order application number or set you want to copy the existing work order information to.  
To look up the work order ID, click **Search**.
5. Select the work order data elements you want to copy to the existing work orders or set.
6. Click **Submit**.  
Civic Platform displays a pop-up window indicating the work order or set copied successfully.

## Viewing and Activating Related Work Orders

Once you have copied work order information from an existing work order to another work order or Set, you can view and activate the new work order. A work order that is associated with another work order is called a parent, child or sibling work order. For more information on work order relationships, see [Managing Related Work Orders](#).

### To view and activate a related work order

1. Find the work orders you want to view and activate.

To look up the work order ID, click **Search**.

2. Click the Related **Records** tab.

Civic Platform displays a work orders genealogy page.



3. Click the work orders that you want to view and activate.

Civic Platform displays the child work order record tabs.

## Removing Related Work Order Relationships

Civic Platform allows users to remove or delete the parent or child relationship between two work orders. This feature does not delete either of the work orders. It simply removes the relationship between them.

### To delete related work order relationships

1. Find the child work order(s) you want to remove from the parent work order.

To look up the work order ID, click **Search**.

2. Click the Related **WO & SR** tab.

Civic Platform displays a work orders genealogy page.

3. Select of the child work order(s) you want to delete from the parent work order.

4. Click Delete.

Civic Platform deletes the child work order(s).



#### Note:

Before removing a work order relationship, make sure you want to remove the relationship. No warning or confirmation message appears when removing related work orders.

## Managing Work Order Tasks

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Civic Platform supports a lower level of detail on the work order form, referred to as a work order task. A work order task is a step in completing a work order activity. These tasks have little to do with the flow of a work order, but instead are a checklist or set of instructions for the individual or crew performing the work. For this reason, they are adjustable per work order. For example, you need maintenance completed on a vehicle. The technician would create a single work order but put multiple tasks on the work order, such as changing the oil and inspecting the brakes.

Civic Platform supports the administration of Work Order Tasks by providing a new tab on the work order form entitled Work Order Task. If the administrator enables the feature and enters the tasks, work order tasks are attached to work order templates and specify the exact data to be completed. The user is then able to edit the Estimate and Standard Operating Procedure, as well as record Actual, enter a Completed Date, and update the Comments for each task. The work order also provides a cost column. Depending on user permissions, users either see asterisks (\*\*\*\*) in the cost column or the actual numerical values of the work order cost by tasks.

### Topics

- [Viewing Work Order Tasks](#)
- [Creating a Work Order Task](#)
- [Looking Up and Adding a Work Order Task](#)
- [Updating a Work Order Task](#)
- [Deleting a Work Order Task](#)

### Viewing Work Order Tasks

You can quickly access a list of the work order tasks attached to the work order that you are currently responsible for. The tasks display in a portlet underneath the work order in a tab called Work Order Tasks.

#### To view work order tasks

1. Go to the Work Orders portlet. If you are using the default settings, this appears on your Home or Work Orders main link.  
Civic Platform displays a list of all work orders currently assigned to you.
2. Locate the work order you want to view and click the link.  
Civic Platform displays the work order details on the Record tab.
3. Click the Work Order Task tab.  
Civic Platform displays a list of all work order tasks associated with the work order.
4. To update the work order task, see [Updating a Work Order Task](#). For a complete list of the fields that display, see [Work Order Task Fields](#).

### Creating a Work Order Task

Civic Platform has a form for creating a new work order task within a work order. In this form, you can enter a description of the task to be completed. The basic data that is populated for the task include: Task Code, Description, and Default Standard Operating Procedures.

#### To create a work order task

1. Go to the Work Orders portlet. If you are using the default settings, this appears on your Home or Work Orders main link.

Civic Platform displays a list of work orders.

2. Click the work order that you want to view.
3. Click the Work Order Task tab.  
Civic Platform displays a list of work order tasks.
4. Click New.  
Civic Platform displays the Work Order Task form.
5. Enter the Task Code, Task Description, and Standard Operating Procedures. For a complete list of the fields that display, see [Work Order Task Fields](#).
6. Click an Effective date, Expire date, and Default Estimate Duration from the drop-down menu.
7. Click **Submit**.  
Civic Platform adds the new work order task to the work order.

## Looking Up and Adding a Work Order Task

You can add a work order task by looking up and selecting a task that already exists in Civic Platform. If you have permission, you can update information about a work order task once you find it.

### To look up and add a work order task

1. Go to the Work Orders portlet. If you are using the default settings, this displays on your Home or Work Orders main link.  
Civic Platform displays a list of work orders.
2. Click the work order that you want to view.
3. Click the Work Order Task tab.  
Civic Platform displays a list of all attached work order tasks.
4. **Click Look Up.**  
Civic Platform displays a search form.
5. Complete any of the fields that display. See [Work Order Task Fields](#).
6. After you enter all the desired search parameters, click **Submit**.  
Civic Platform returns a list of work orders matching your search parameters.
7. Select the work order task(s) that you want to add to the work order.
8. Click Select.  
Civic Platform adds the selected task(s) to the work order.

## Updating a Work Order Task

Users can update some of the information in the work order task. For example, when a task is completed, the user can enter the Completed Date. Fields available for changes are: Comments, Actual time needed to complete the task, and Completed Date.

Depending on your agency's business practices and depending on your permissions, you may have access to update the Estimate number, SOP, and Comments. Civic Platform records and displays the name of the user who enters the updates, and the date that the user saves the updates.

### To update a work order task



1. Go to the Work Orders portlet. If you are using the default settings, this appears on your Home or Work Orders main link.  
Civic Platform displays a list of work orders.
2. Click the work order that you want to view.
3. Click the Work Order Task tab.  
Civic Platform displays a list of all attached work order tasks.
4. Update the desired fields on the work order task that you want to edit.

**Note:**

If the work order task is assigned to a workflow task, the workflow task must be marked as currently Active or Complete before you can mark the work order task as complete. When a work order task is marked complete, the task displays in green.

---

5. Click **Submit**.

## Deleting a Work Order Task

There may be reason to remove a work order task, whether it has been entered by mistake or is no longer used. When a task is deleted from the work order, the association between the task and the work order is removed. The task remain in the work order task definition list and can be used to associate with other work orders and work order templates.

### To delete a work order task

1. Go to the Work Orders portlet. If you are using the default settings, this appears on your Home or Work Orders main link.  
Civic Platform displays a list of work orders.
2. Click the work order that you want to view.
3. Click the Work Order Task tab.  
Civic Platform displays a list of all attached work order tasks.
4. Select the work order task you want to delete.
5. Click **Delete**.  
Civic Platform asks you to confirm the deletion.
6. Select **OK**.  
Civic Platform deletes the work order task.

## Running a Report

Process and print any report that your system administrator makes available to you, such as the Work Order report. Many agencies run custom reports that are designed for business practices. Some reports require specific report criteria. For example, you may need to identify the work order type, user group, dates, or other information. Because reports may differ, contact your system administrator or your supervisor if you have questions about a particular report.

### To run a report from a work order

1. Navigate to the Work Order portlet and select a Work Order. You can use Search to locate a particular work order..
2. From the Work Order detail portlet, choose the report you want to run.
  - If you want to run the Work Order report, click the printer button and choose the report name from the drop-down list.
  - For all reports, choose **Menu > Report**, then choose the report name from the list that displays. Civic Platform displays a list of available reports to run.
3. Enter parameter information for your report.

The parameter information varies by report. If you have questions about this form, or are uncertain of the criteria to include, contact your supervisor or your system administrator.

Inspection Activity

Inspection Date\*:  **Date** to  **Date**

Department:  **Department**

Inspector:   **Current User**

Application Type: **Type**  **Subtype**  **Category**  **Search**

**Submit**

4. Click **Submit**.

Civic Platform generates the form in a PDF document that you can print using your browser's print controls.

## Cloning a Work Order

---

You can create one or more new work orders by cloning an existing work order. Cloning is the act of creating a duplicate application, permit, asset, or service request using an existing permit, application, asset, or service request as a template. Civic Platform automatically generates work order numbers for any new work orders created by cloning.

When you clone a work order, the new work order copies any of the following information depending on the cloned work order: work order type, address, parcel, owner, licensed professional, applicant, complaint, complainant, additional information, work order specific information, valuation calculations, and work order conditions.

You have the option to copy the existing workflow, including active and inactive tasks, and any fee items that have already been assessed for the cloned work order.

### To clone a work order

1. Find the work order you want to clone.

To look for the work order ID, click Search.

2. Navigate to the Record tab.

Civic Platform displays the work order details.

3. Hover on the **Menu** button to display a command menu, then select **Clone**.

Civic Platform displays the Set—Clone Application page.

4. Complete these fields:

<b>Number of Clones</b>	The number of new work orders that you want to create. If you are cloning more than one work order, Civic Platform creates this many copies of work orders for each work order you are cloning.
<b>Fee Items</b>	Copies fee items from the cloned work order. This includes all of the fee items from the cloned work order, but does not include any fee payments.
<b>Workflow Status</b>	Copies workflow information from the cloned work order. This information includes active and inactive tasks and task statuses.

5. Click **Submit**.

Civic Platform copies the work order.

6. Modify the work order to reflect any differences from the original work order.

## Managing Work Order Assignments and Costs

---

Assignment and cost items help identify where resources are allocated and where the money is spent. For example, a new fire hydrant is to be installed in a new subdivision. A work order is generated for the installation. It includes the assignments or costs of relevant human resources (contractor) and assets (fire hydrant and tools). The cost of a new fire hydrant is \$5000 and the hourly rate for a contractor to install the fire hydrant is \$40/hr. The tools needed to install the fire hydrant cost \$300. The combination of these assignments and costs results in the total job cost for the work order.



### Note:

Depending on the number and type of assets associated with a work order, you can distribute the total cost of a work order by asset count, asset size, asset type, or manual allocation. For information on work order cost distribution, see [Work Order Cost Distribution](#).

---

### Topics

- [Adding a Work Order Assignment or Cost](#)
- [Editing Work Order Assignments and Costs](#)
- [Deleting an Assignment or Cost Item from a Work Order](#)
- [Converting Assignments to Costs](#)
- [Creating Cost Groups](#)

### Adding a Work Order Assignment or Cost

You can add cost items to a work order either as assignments or costs.

- Assignments are the cost item arrangement for the work order. They do not comprise the total work order cost but can be converted into costs.
- Costs are the actual spending on a work order and comprise the total work order cost.

You can add cost items to a work order manually, or use cost items available on the work order template. Your agency administrator pre-defines cost items on work order templates. For information on how to set up new costing items or associate costing with a work order template, see your agency administrator.

### Topics

- [Looking Up Cost Items to Add Assignments or Costs](#)
- [Looking Up Cost Groups to Add Assignments or Costs](#)
- [Adding a New Assignment or Cost](#)

### Looking Up Cost Items to Add Assignments or Costs

You can search the cost items defined by your agency administrator and add them as assignments or costs into a work order.

#### To look up cost items and add assignments or costs

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to add assignments or costs to.  
Civic Platform displays the work order detail portlet.

2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Click **Look Up**.
4. Select **Look up by Cost Item** from the drop-down menu.  
Civic Platform displays detail fields associated with the cost item.

5. Choose an option from the **Cost Type** drop-down list and/or complete the fields associated with the cost item you are searching for.
6. Click **Submit**.  
Civic Platform returns a list of work order cost items matching your search parameters.
7. If you are adding a single cost item, select the cost item you want to associate with the work order, complete the fields with available data (see [Costing Fields](#) for field definitions). If you are adding multiple cost items, go to the next step.  
If you are assigning an asset or human resource to the work order, you can select the asset or human resource, and then click **Resource Calendar** to view the availability of the asset or human resource. The calendar displays in day, week, or month view.

Multi-Resource Calendar View										<a href="#">Help</a>	
02/08/2014		...						02/14/2014		Busy	
<input type="checkbox"/>	Resource Name	12:00 AM	01:00 AM	02:00 AM	03:00 AM	04:00 AM	05:00 AM	06:00 AM	07:00 AM	08:00 AM	
	All										
<input type="checkbox"/>	ANDERSON										

8. If you are adding multiple cost items,
  - a. Select the first cost item you want to associate with the work order and complete the fields with available data. See [Costing Fields](#) for field definitions. Use the Resource Calendar to view the availability of the assets or human resources as needed (see previous step).
  - b. Select the next cost item that you want to associate with the work order.  
The following fields auto-populate, provided you entered data into the same fields for the previous cost item, and provided you have not entered data into the current cost item fields: Work Order Task, Type, Quantity, Date, Start Time, End Time, and All Day Event checkbox.

**Note:**

When you select the next cost item, the values from the previous cost item are auto-populated to the new item unless the newly marked item had previously entered data. Previously entered data is not overwritten.

EXAMPLE: Cost item one is added as Type = Assignment, Quantity = 1, and Start/End times = 3:00pm-4:00pm. Cost item two has the same values for all of the fields, so when you mark the box to select the second item, all of the item one data values copy to the item two fields. Cost item three has the same values for all the fields except for Quantity. For Cost item three, Quantity = 5. Enter 5 in the Quantity field, then check the box to select the third item. All of the item two data values except for Quantity copy to the item three fields.

- c. You can accept the auto-populated data, and repeat the previous step for subsequent cost items that you want to add, or you can modify the one or more of the values in the fields for the new cost item.

**9. Click Select.**

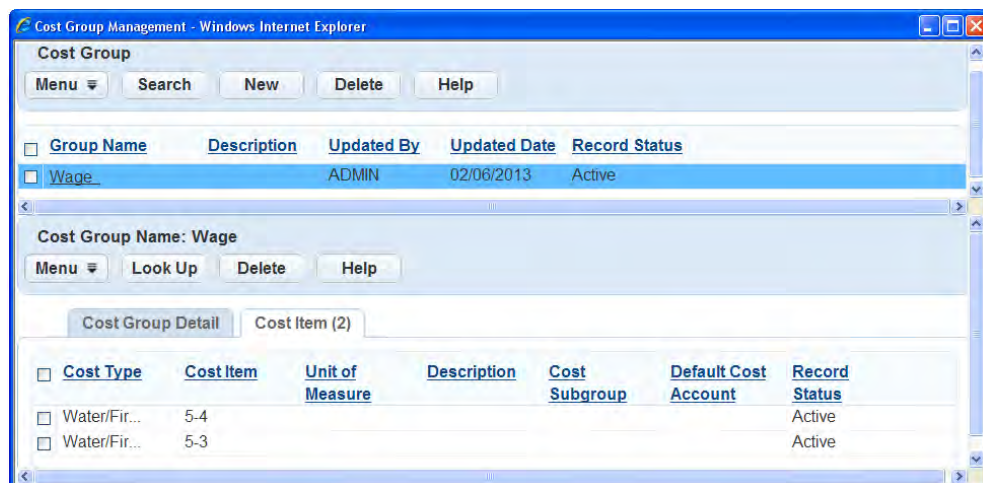
Civic Platform creates an association between the selected assignment and cost items and the work order, and it displays them in a list.

**Looking Up Cost Groups to Add Assignments or Costs**

If you work frequently with certain cost items, you can apply the cost group management functionality to group the cost items as needed. This enables you to look up and add costs by group, adding each cost item in the group to work orders in a single step.

**To look up cost groups and add assignments or costs**

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to add assignments or costs to.  
Civic Platform displays the work order detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Click **Cost Group Management**.  
Civic Platform opens a new Cost Group Management window displaying a list of existing cost groups.



4. If necessary, add a new cost group

- a. Click **New**.

- b. Specify the cost group name in the Cost Group Detail tab, and click **Submit**.
  - c. Select the Cost Item tab, and click **Look Up** to search for cost items you plan to add in the cost group.
  - d. Select the cost item(s) you want to add, and click **Select**.
  - e. Close the Cost Group Management window, return to the Work Order Details portlet.
5. Click **Look up**.
6. Select **Look up by Cost Group** from the drop-down menu.  
Civic Platform displays the cost group selection drop-down list.

The screenshot shows a web interface for 'Assignments and Costs (2)'. At the top, there are navigation buttons: 'Go To', a left arrow, and a 'Calendar' button. Below this is a section titled 'Group Name \*' with a dropdown menu currently showing '--Select--'.

7. Choose the cost group name you want to use, and click **Submit**.  
Civic Platform returns a list of all work order cost items in the cost group. You can use the auto-populate feature to add multiple cost items quickly and efficiently.
8. If the cost items you are adding have similar data (such as Work Order Task, Type, Quantity, Date, Start Time, End Time, and/or All Day Event), do the following:
- a. Select the first cost item you want to associate with the work order and complete the fields with available data. See [Costing Fields](#) for field definitions.  
If you are assigning assets or human resources to the work order, you can select the assets or human resources, and then click **Resource Calendar** to view the availability of the assets or human resources in a calendar. The calendar displays in date range view.
  - b. Select the next cost item in the group that you want to associate with the work order.  
The following fields auto-populate, provided you entered data into the same fields for the previous cost item, and provided you have not entered data into the current cost item fields: Work Order Task, Type, Quantity, Date, Start Time, End Time, and All Day Event checkbox.



**Note:**

When you select the next cost item, the values of the cost item preceding the new item are auto-populated to the newly marked item unless the newly marked item had previously entered data. Previously entered data is not overwritten.

EXAMPLE: Cost item one is added as Type = Assignment, Quantity = 1, and Start/End times = 3:00pm-4:00pm. Cost item two has the same values for all of the fields, so when you mark the box to select the second item, all of the item one data values copy to the item two fields. Cost item three has the same values for all the fields except for Quantity. For Cost item three, Quantity = 5. Enter 5 in the Quantity field, then check the box to select the third item. All of the item two data values except for Quantity copy to the item three fields.

- c. You can accept the auto-populated data, and repeat the previous step for subsequent cost items that you want to add, or you can modify the one or more of the values in the fields for the new cost item.
9. Double check the auto-populated values and make any needed adjustments.
10. Click **Select**.

Civic Platform creates an association between the selected assignment and cost items and the work order, and it displays them in a list.

## Adding a New Assignment or Cost

In some circumstances you may want to add a new assignment or cost to a work order directly.

### To add a new assignment or cost

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the work order detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Click **New**.  
Civic Platform displays the fields related to cost items.
4. Select the cost type and cost item, then set the type to **Assignment** or **Cost**.
5. Complete the fields with available data. See [Costing Fields](#) for field definitions.  
If you are assigning an asset or human resource to the work order, you can click the **Show Calendar** link next to the **Date** field to view the availability of the asset or human resource in a calendar. The calendar that displays is the same one shown on the Calendar tab of the Assets portlet.
6. Click **Submit**.  
Civic Platform creates an association for the selected assignment or cost item with the work order and displays the work order assignments and costs list.

## Editing Work Order Assignments and Costs

You can edit the assignments and costs for a work order as needed, and as permitted.



### Note:

If all of the fields are read-only, and a cost item needs to be updated, please contact your system administrator.

---

### To edit work order assignments and costs

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Open the assignment or cost item you want to view or edit.  
Civic Platform displays detail fields associated with the cost item.
4. Make changes as needed. See [Costing Fields](#) for field definitions
5. Click **Submit**.  
Civic Platform returns a list of all cost items associated with the work order.



## Deleting an Assignment or Cost Item from a Work Order

When a cost item is deleted, the association between the cost item and the work order is removed. However, the cost item is still available in the cost item definition list and you can use it to associate with other work orders and work order templates.

### To delete a work order assignment or cost item

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Select the cost item(s) you want to remove.
4. Click **Delete**.  
Civic Platform displays a message indicating record(s) deleted successfully.

## Converting Assignments to Costs

When managing a work order, you may find that an assignment that is associated with the work order needs be converted to a cost.

### To convert an assignment to cost

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Select each assignment item that you want to convert to costs. You can select multiple assignments. However, if an assignment is converted to cost before, you cannot do it again.
4. Click **Convert to Cost**.  
Civic Platform displays a Usage/Time Tracking window.

5. Enter the usage/time tracking information for the cost item, and click **Submit**.  
Civic Platform generates a cost item for each selected assignment while still keeping the assignment entry.

## Creating Cost Groups

Some cost items may always work together, you can group them for convenience. You can manage cost groups in either the Work Orders or Asset Condition Assessment portlet.

### To create a Cost Group

1. Navigate to the Work Orders or Asset Condition Assessment portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the work order detail portlet.
2. Click the Assignments and Costs tab.  
Civic Platform displays a list of existing assignment and cost items associated with the work order.
3. Click **Cost Group Management**.  
Civic Platform displays a list of existing cost group and cost items associated with the work order.
4. Click **New**.
5. Specify the cost group name and click **Submit**.  
Civic Platform creates a cost group.

## Viewing the Work Order Calendar

The work order calendar allows users to view the task schedule for the current work order, including the scheduling of assignments, inspections, and events.

### To view the work order calendar

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.

Civic Platform displays the detail of the work order selected.

2. Click the link to the work order you want to view.

Civic Platform displays the work order details on the tab.

3. Click the Calendar tab.

Civic Platform displays the calendar in month view.

Record ID: ORE13-00000001  
 New Inspection Help

Jobs (0) Calendar Classic Reports Comments (0) Conditions (0) Contacts (0) Distribution History (0) Documents (0)

<< Last Month February 2013 Show All Calendars Next Month >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

4. Click any link for a scheduled to view the details, or click **New Inspection** to schedule an inspection.

## Managing Work Order Assets

Work orders usually are tasks performed on assets, thereby most work orders associate with assets. For example, you could create a work order for a fire hydrant to be serviced next month. Since the fire hydrant is an asset, you must search for the fire hydrant and associate the fire hydrant information, including the address, to your new work order.

There are multiple access points for you to associate assets with work orders, including the Assets, Work Orders, and PM Schedule portlets. In the Assets and PM Schedule portlets, if you select some assets and create a work order, the work order automatically associate with the assets. In the Work Order portlet, you may go to the Assets tab of an existing work order and link assets to the work order. You can also select assets from the map to link with work orders via Accela Silverlight GIS.

### Topics

- [Associating an Asset to a Work Order](#)
- [Viewing and Editing Associated Assets](#)
- [Deleting Associated Assets](#)
- [Updating Details for Multiple Work Order Assets](#)

### Associating an Asset to a Work Order

A work order may already have assets associated with it at its creation. When you edit the details of a work order, you may want to associate more assets to the work order. You can look up in existing assets list and select ones to create the association. Or, you can open the Accela Silverlight GIS map viewer, view the assets that are already linked to the work order, and select new assets that need to be linked.

#### To associate an asset to a work order

1. Go to the Work Orders portlet and locate the work order you want to work with (see [Using the Search Features](#)).

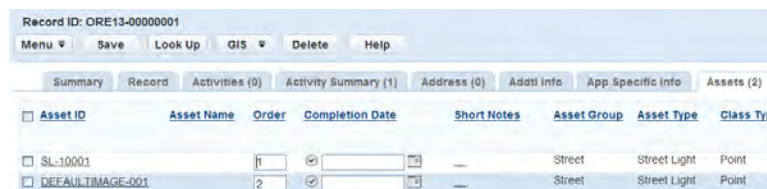
Civic Platform displays work order details on the Record tab.

2. Click the work order ID link to open the work order.

Civic Platform displays the work order details.

3. Click the Assets tab.

Civic Platform displays a list of assets associated with the work order.



Asset ID	Asset Name	Order	Completion Date	Short Notes	Asset Group	Asset Type	Class Typ
<input type="checkbox"/> SL-10001		1			Street	Street Light	Point
<input type="checkbox"/> DEFAULTIMAGE-001		2			Street	Street Light	Point

4. To look up an asset and associate it to the work order, do the following:

- a. Click **Look Up**.

Civic Platform displays the Associated Assets search form.

- b. Enter search criteria.

- c. Click Submit.

Civic Platform returns a list of assets that match your search criteria.

- d. Select the asset you want to associate to the work order.
  - e. Click **Select**.  
Civic Platform adds the asset into the associated assets list of the work order.
5. To select an asset from the Accela Silverlight GIS map viewer and associate it to the work order, do the following:
- a. Click **GIS** and select **Show/Select Assets**.  
Civic Platform displays the Accela Silverlight GIS map viewer.
  - b. Select an asset on the map.  
Accela Silverlight GIS displays a map overlay or icon on the selected asset. The asset also displays in the Contents panel.
  - c. Open either the Context or Actions menu.  
Accela Silverlight GIS displays the available map commands.
  - d. Click Link Object to Work Order.  
Civic Platform returns to the associated assets list, with the selected asset in the list.

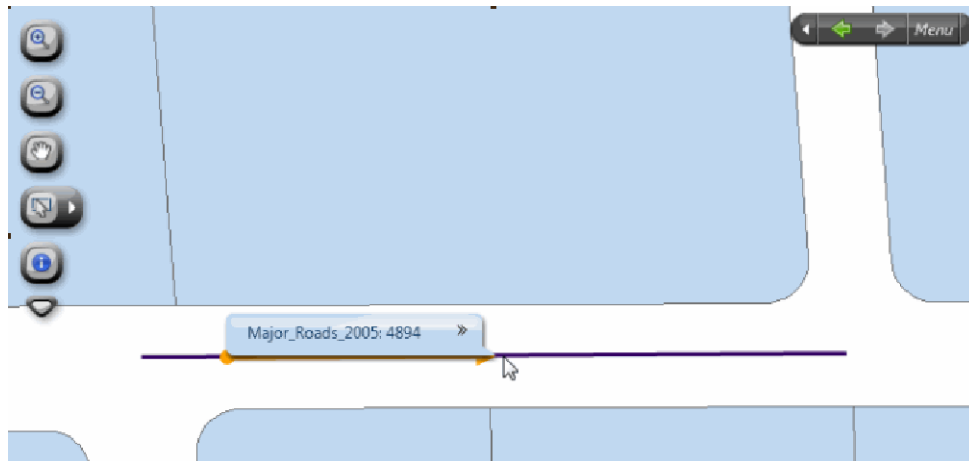
## Viewing and Editing Associated Assets

You can view detailed information about an associated asset in the Assets tab. Furthermore, you can edit the details of each asset, and configure the asset fields that are specific to the work order. If you configure the start and end locations of linear assets in a work order, you can open the Accela Silverlight GIS map viewer to view the assets with their start and end locations.

### To view and edit an associated asset

1. Go to the Work Orders portlet and search the work order to which you want to associate assets.  
Civic Platform displays work order details on the Record tab.
2. Click the work order ID link to open the work order.  
Civic Platform displays the work order details.
3. Click the Assets tab.  
Civic Platform displays a list of assets associated with the work order.
4. To edit the details of an associated asset:
  - a. Clicking the asset ID link of the asset.  
Civic Platform displays the asset details.
  - b. Edit field values as needed.
  - c. Click **Save**.
5. To edit the asset fields specific to the work order:
  - a. Find the asset in the assets list.
  - b. Complete the editable fields next to the Asset ID of the asset.
  - c. Click **Save**.
6. To view associated assets in the Accela Silverlight GIS map viewer:

- a. Select the assets in the assets list.
  - b. Click **GIS** and select **Show/Select Assets**.  
Accela Silverlight GIS opens the map viewer and displays the selected assets with map overlay or icon in the map.
7. To view the work location of associated linear assets in the Accela Silverlight GIS map viewer:
- a. Select the linear assets in the assets list.
  - b. Click **GIS** and select **Show Work Location**.  
Accela Silverlight GIS opens the map viewer and displays the selected linear assets with the start point, end point, and an arrow indicating the start location and end location.



For a description of the linear asset work location, see [Work Order-Related Asset Fields](#).

- c. If you want to reverse the start and end locations of a linear asset, open the Context menu of the asset in the map viewer, and select **Flip Direction**.  
The arrow that indicates the start location and end location reverses its direction.

## Deleting Associated Assets

You may want to remove some assets that are associated to a work order. Deleting an asset record from a work order does not delete the asset from the database; rather, it deletes the relationship between the asset and the work order.

### To delete associated assets

1. Go to the Work Orders portlet and search the work order to which you want to associate assets.  
Civic Platform displays work order details on the Record tab.
2. Click the work order ID link to open the work order.  
Civic Platform displays the work order details.
3. Click the Assets tab.  
Civic Platform displays a list of assets associated with the work order.
4. Select the asset you want to delete from the work order.
5. Click **Delete**.  
Civic Platform deletes the relationship between the asset and the work order.

## Updating Details for Multiple Work Order Assets

Occasionally, you may find that you need to update several assets associated with a particular work order with the same information. For example, several streetlights may all be put into service on the same day. Civic Platform allows you to save time and improve data accuracy by updating a group of assets with one action.

### To update group asset details

1. Navigate to the Work Order portlet. Use Search to locate and select the work order associated with the assets you need to update.
2. From the work order detail area, select the Asset tab.
3. Select the asset(s) you want to update. You may select assets of the same type, or of different types.
4. Hover over the **Menu** button to display a drop-down menu and then select **Group Update**.

Civic Platform displays the Asset Details page. A notice displays if you attempt to update assets for which you do not have permission.

The fields displayed are those that are common to all of the selected asset types. Notice that when assets of the same type are selected, such as a group of street lights, additional fields specific to the asset type are displayed.

Assets

Menu Save Reset Cancel Help

Asset ID:  
FH-00002 SM-00003

Status  
--Select--

Description  
check spelling

Comments  
check spelling

Start Value

Salvage Value

Useful Life (Years)

Depreciation Start Date

Date of Service

Depreciation End Date

5. Update the fields as needed with available data.
6. Click **Save**.  
Civic Platform saves your information and refreshes the asset list so that it reflects the changes.

## Managing Work Order Parts

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The parts inventory allows an agency to track usage and supply of consumable parts. The parts inventory defines each individual part, the location of the part, and the vendor or manufacturer contact information. When these parts are needed for a job, they are linked to a work order. When these parts are linked to the work order and used, the available supply on hand for each part and location is updated.

For example, your agency may be responsible for maintaining a fleet of trucks. Maintaining a truck requires several different parts, one of which is an oil filter. If there are three trucks that are in need of an oil change, service providers need three oil filters to perform the service. You create a work order for the oil change, and using the part inventory, you locate the oil filter needed for the trucks you are servicing. The part inventory provides the available supply of oil filters and where they are located. When you assign the parts to the work order, the three oil filters are subtracted from the total supply count at the location, proving an accurate and current inventory count.

### Topics

- [Linking a Part to a Work Order](#)
- [Adding Standard Parts](#)
- [Editing Work Order Parts](#)
- [Deleting a Work Order Part](#)

### Linking a Part to a Work Order

You can specify the parts to be used for specific types of work orders by linking a part to a work order.



#### Note:

The parts that can be associated with the work orders are created and maintained in the parts inventory portlet. See [Part Inventory](#) for more information on creating parts.

---

### To link a part to a work order

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Part tab.  
Civic Platform displays a list of parts associated with the work order.
3. Click **Look Up**.  
Civic Platform displays the fields associated with part.
4. Complete the fields with available data. See [Work Order Parts Fields](#) for field definitions.
5. Click **Submit**.  
Civic Platform displays the part search results.
6. Select the part(s) you want to associate with the work order template.
7. Click **Submit**.  
Civic Platform creates an association for each part selected with the work order template and displays the work order template part list.
8. Enter the number of parts and Location Name for the work order. These fields are required.



9. Update any of the fields that display and are editable in the part you want to update.

10. Click **Submit**.

The part is linked to the work order.

## Adding Standard Parts

If the assets linked to a work order have parts associated to them, you can access a list of the standard parts from the work order form and add them to the work order. For information on associating a part to an asset, see [Associating a Part to an Asset](#). For information on working with parts, see [Part Inventory](#).

### To add standard parts

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. To verify that a linked asset has parts associated to it, you can view the asset record (for instructions, see [Viewing Assets](#)), skip to step 5, or do the following:
  - a. Click the Asset tab.  
Civic Platform displays the linked assets list portlet.
  - b. Click the name of an asset.  
Civic Platform displays the asset record in a detail portlet.
  - c. Click the Associated Parts tab.  
Civic Platform displays the list of any parts associated to the linked asset.
3. Click the Part tab.  
Civic Platform displays the list of parts, if any, associated to the work order.
4. Click **Standard Parts**.  
If there are parts associated to the linked asset, they are displayed in a standard parts list.
5. Select the part(s) you want to add to the work order.
6. Click **Select**.  
Civic Platform adds the part to the work order.

## Editing Work Order Parts

When editing work order part information, you may find that some of the part information is read-only. If you need to update any of the read-only fields, go to the Parts Inventory portlet. See [Part Inventory](#) for more information.

### To edit a work order part

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Part tab.  
Civic Platform displays a list of parts associated with the work order.
3. Select the part that you want to review and edit.  
Civic Platform displays the part details on the Record tab.

4. Update fields as needed. See [Work Order Parts Fields](#) for field definitions.
5. Click **Submit**.

### **Deleting a Work Order Part**

When you delete a work order part, the association between the work order and the part is removed. The part is still available in the parts inventory for use in creating other work orders.

#### **To delete a work order part**

1. Navigate to the Work Orders portlet and use Search to locate and select the work order you want to work with.  
Civic Platform displays the detail of the work order selected.
2. Click the Part tab.  
Civic Platform displays a list of parts associated with the work order.
3. Select the part(s) that you want to dissociate.
4. Click **Void**.  
Civic Platform displays a message indicating record(s) voided successfully.

## Tracking Work Order Production

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Civic Platform provides a way for an 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. Once the actual work order cost is entered into Civic Platform, the actual data is compared against a defined estimated standard. As a result, the costs and crew performance for a Work Order can be compared on an equal basis to the costs and crew performance of another Work Order. The agency can take this information, review it, and apply it to problem solve, budget, and plan.

In order to incorporate Work Order Tracking for your agency, the system administrator must set up the defined standards for the Work Order Types, and set other configurations such as FIDs and enabling a Standard Choice. Once this is complete, enter the work order production information in the designated fields and the calculations for tracking functions properly.

### Topics

- [Implementing Work Order Production Tracking](#)
- [Recalculating the Work Order Production](#)
- [Viewing Work Order Production History](#)

### Implementing Work Order Production Tracking

Begin using the Work Order production tracking by entering data for the work order in the appropriate production fields.

#### To implement Work Order Production Tracking

1. Go to the Work Orders portlet from the Home or Work Order console tab.
2. Click **New** for a new work order or choose an existing work order from the Record list.
3. Complete the work order fields. Please refer to [Work Order Fields](#) for a complete list of fields.
  - a. If the default value for **Est. Prod. Units** is incorrect, enter the appropriate value.
  - b. When closing the work order or each days activity, update production information in the **Actual Prod. Units** field.

4. Click **Submit**.

Civic Platform validates the Actual Prod. Units and Est. Prod. Units fields, then the record is saved in production history.

### Recalculating the Work Order Production

If the agency decides to change some of the default or estimated standard values for a Work Order Type, existing work orders can be recalculated to reflect the change. By doing this, the ability to compare work order production crews from work order to work order remains consistent and constant. If you want to make the changes to the default or estimated standard values, contact the system administrator.

#### To Recalculate the Work Order Production

1. Go to Work Orders portlet from the Home or Work Order console tab.  
Civic Platform displays a list of work orders in the portlet.
2. Select the work order(s) you want to recalculate.
3. Hover over the **Menu** button and choose **Recalculate** from the menu.

Civic Platform executes the calculations and a new record for production history is created.

## **Viewing Work Order Production History**

Civic Platform provides the ability to track the production history for work orders. This allows the agency to track recalculations and may assist in the ability to anticipate the inflation rate. This information may also assist in reviewing and comparing production crew proficiency during different times of the year.

### **To view a Work Order Production History**

1. Go to the Work Order portlet from the Home or Work Order console tab.
2. Select the work order that you wish to review production history from the list.
3. Navigate to the detail portlet for the work order and click the Production History tab.  
Civic Platform displays the work order production history.

## Examining Work Order Details

The following tables list and define the default fields available in the different interfaces you encounter when working with work orders.

- [Work Order Fields](#)
- [Group Update Fields](#)
- [Costing Fields](#)
- [Work Order Task Fields](#)
- [Work Order-Related Asset Fields](#)



**Note:**

Based on your user permission for each cost item, you may or may not be able to see the actual values of some cost fields. When you do not have permission to work with a cost item, the cost fields display asterisks "\*\*\*\*" instead of the actual values.

### Work Order Fields

Any of the fields listed below may be available in your Work Order form.

Table 114: Work Order Fields

<b>Actual Prod. Units</b>	The actual production units for the work order. Civic Platform generates a default value for this field from the "Default Production Unit" set up by the system administrator. If enabled, you may enter a range when searching, where the desired number of actual production units is between the upper (From) and lower (To) values.
<b>Alt ID</b>	An alternate ID used to identify the application.
<b>Assigned Date</b>	The date when work order assignment to a department or individual occurred.
<b>Assigned To Department</b>	The department that is responsible for the work order. Click the Selection icon to choose a department. If you are responsible, click the <b>Current User</b> link to enter your user name in the field. The associated department field then updates to reflect the correct department for the current user.
<b>Assigned to Staff</b>	The individual within a department that is responsible for the work order. Use the drop-down list to choose an individual within the selected department. If you are responsible, click <b>Current User</b> to enter your user name into the field. When you click Current User, the associated department field updates to show the department for the current user.
<b>Brief Description</b>	A brief description that helps you to identify the work order.
<b>Channel Reported</b>	The communication method used to submit a work order. For example, mail, email, a public internet site, or a phone call.
<b>City</b>	The city associated with the work order.
<b>Closed By</b>	The person who closed the request.
<b>Closed Date</b>	The date when the work order closes. Click the calendar icon located next to the <b>From</b> and <b>To</b> fields to specify a date range. Civic Platform supplies these dates in the corresponding fields.

<b>Closed Department</b>	The department responsible for closing the work order. Click the Selection icon to choose a department.
<b>Closed Staff</b>	The individual within a department responsible for closing the work order. Use the drop-down list to choose an individual. If you are responsible, click <b>Current User</b> to enter your user name into the field. When you click Current User, the associated department field updates to show your department.
<b>Contact Email</b>	The email address of the primary contact associated with the work order.
<b>Contact First Name</b>	The first name of the primary contact associated with the work order.
<b>Contact Last Name</b>	The last name of the primary contact associated with the work order.
<b>Contact Middle Name</b>	The middle name of the primary contact associated with the work order.
<b>Contact Relationship</b>	The primary contact's relationship to this work order. For example, choose "citizen."
<b>Contact Type</b>	The type of primary contact associated with the work order, such as "applicant." If you are searching for a work order, use the drop-down list to choose a type.
<b>Cost Per Unit</b>	Read-only field that displays the cost per unit.
<b>Detailed Description</b>	A detailed work description of the work order.
<b>Direction</b>	The street direction designation of the primary address associated with the work order.
<b>Email</b>	The email address of the primary contact associated with the work order.
<b>Est. Cost Per Unit</b>	Read-only field that displays the estimated cost per production unit, which is defined at the Application Type level by the system administrator.
<b>Est. Job Cost</b>	Read-only field that displays the estimated job cost (Cost Per Unit" X "Est. Prod. Units). This value calculates automatically when you save a work order.
<b>Est. Prod. Units</b>	The default value for estimated production units.
<b>First Name</b>	The first name of the primary contact associated with the work order.
<b>House # Alpha (end)</b>	The ending street number that makes up the address. You can enter alphanumeric characters in this field.
<b>House # Alpha (start)</b>	The beginning street number that makes up the address. You can enter alphanumeric characters in this field.
<b>Last Name</b>	The last name of the primary contact associated with the work order.
<b>Level # (end)</b>	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-storey building/sub-complex.
<b>Level # (start)</b>	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multi-storey building/sub-complex.
<b>Level Prefix</b>	The prefix for the level numbers (floor numbers) that make up the address.
<b>Middle Name</b>	The middle name of the primary contact associated with the work order.
<b>New Status</b>	Use the drop-down list to choose the status for the Work Order. See also the description of the Status field.
<b>Opened Date</b>	The creation date of the work order record.
<b>Opened Department</b>	The department responsible for creating the work order. Click the Selection icon to choose a department.
<b>Opened Staff</b>	The individual within a department who is responsible for creating the work order. Use the drop-down list to choose an individual. If you are responsible, click <b>Current User</b> to enter your user name into the field.
<b>Organization Name</b>	The name of the organization to which the primary contact associated with the work order belongs.

<b>Owner Name</b>	The primary owner associated with the work order.
<b>Parcel Number</b>	The primary parcel associated with the work order.
<b>Parts &amp; Costing</b>	This field displays the total cost for a work order, which is the sum of the total cost from the Parts tab, and the total cost from the Assignments and Costs tab.
<b>PM Schedule ID</b>	The preventive maintenance schedule ID associated with the work order. If enabled, you may enter a range when searching where the desired PM Schedule ID number is between the upper (From) and lower (To) values.
<b>Priority</b>	The priority level assigned to the work order. Use the drop-down list to choose the priority level.
<b>Relationship</b>	The primary contact's relationship to this work order.
<b>Reported Date</b>	The date of the application report.
<b>Reported Time</b>	The time of the application report.
<b>Schedule Date</b>	The scheduled date for the work order.
<b>Schedule Time</b>	The scheduled time for the work order.
<b>Severity</b>	The severity of the work order. Your agency creates the severity levels.
<b>State</b>	The state associated with the work order. If you are searching for a work order, use the drop-down list to choose a state.
<b>Status</b>	<p>The current status of the work order. If you are updating work order details, you can change this status.</p> <p>If the "Value Required to Close" error appears when trying to change the Status to close, this means that the system administrator defined that a value must be present in the "Actual Production Units" field to close the order.</p>
<b>Status Group</b>	If you are searching for a work order, you can specify what status group the work order status belongs to.
<b>Street #</b>	The street number of the primary address associated with the work order (for example, the 150 in 150 N. Main Street).
<b>Street Direction</b>	The street direction of the primary address associated with the work order (for example, the N in 150 N. Main Street).
<b>Street Name</b>	The street name of the primary address associated with the work order.
<b>Street # (Start/End)</b>	<p>The street number(s) of the address associated with the work order.</p> <p>If the address includes multiple street numbers (for example, a fourplex), you can use the Street # Start and Street # End fields to define the range of numbers. Otherwise, you can specify a singular street number in either field. Agencies can configure the Street # Start and End fields to support range search (adding To-From fields), allowing users to search for one or multiple street numbers within a user-defined range.</p>
<b>Street Suffix</b>	The street suffix designation of the primary address associated with the work order.
<b>Street Type</b>	The street type designation of the primary address associated with the work order.
<b>Sub Type</b>	A more specific classification for the work order. Select the desired sub type from the drop-down.
<b>Total Job Cost</b>	Displays the total calculated job cost for the Work Order. If enabled, you may enter a range when searching where the desired total job cost is between the upper (From) and lower (To) values.
<b>Undistributed Costs</b>	Displays the undistributed costs for this work order. If enabled, you may enter a range when searching where the desired undistributed cost amount is between the upper (From) and lower (To) values.

<b>Unit Type</b>	The unit type designation of the primary address associated with the work order. Enter the unit type of the location associated with the work order. For example, CONDO, APT, or SUITE.
<b>Work Order Description</b>	A brief description of the work order.
<b>Work Order ID</b>	The number used to identify the work order. When you first create a work order, Civic Platform generates this number automatically. You cannot modify this number. You can however create an alternate ID if needed. You can enter the full or partial work order ID.
<b>Work Order Name</b>	Enter the name of the work order.
<b>Work Order Task</b>	Identify a work order task on a work order when recording costings. This is possible when the task is marked complete, or associated with a work order task that is complete or currently active.
<b>Work Order Type</b>	The type of work order. The type may be a collection of module, type, subtype, and category. Select the desired type from the drop-down menus.
<b>ZIP Code</b>	The postal code designation of the primary address associated with the work order.

## Group Update Fields

Group Update can be used to update any of the fields listed below and apply the changes to multiple work orders as needed.

Table 115: Group Update Fields

<b>Action By</b>	The person responsible for following up on the work orders.
<b>Action By Department</b>	The department responsible for following up on the work orders.
<b>Actual Prod. Units</b>	The actual production units for the work orders. The default value for this field is generated from the "Default Production Unit" set up by the system administrator.
<b>Assigned Date</b>	The date when the work orders were assigned to a department or individual. Click the calendar icon located next to the field to specify a date range. Civic Platform supplies the date in the corresponding field.
<b>Assigned to Department</b>	<p>The department that is responsible for the work orders. Use the drop-down list to choose the department. If you are responsible, click the Current User link to enter your user name in the field.</p> <p>When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.</p>
<b>Assigned to Staff</b>	<p>The individual within a department that is responsible for assigning the work orders. Use the drop-down list to choose an individual within the selected department. If you are responsible, click the Current User link to enter your user name into the field.</p> <p>When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.</p>
<b>Closed by Department</b>	The department responsible for closing the work orders.
<b>Closed by Staff</b>	<p>The individual within a department responsible for closing the work orders. Use the drop-down list to choose an individual. If you are responsible, click the Current User link to enter your user name into the field.</p> <p>When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.</p>
<b>Closed Date</b>	The date when the work orders were closed. Click the calendar icon located next to the field to specify a date. Civic Platform supplies this date in the corresponding field.
<b>Comments</b>	Comments about the work orders in this field.



<b>Completed by Department</b>	The department responsible for completing the work orders.
<b>Completed by Staff</b>	The individual within a department responsible for completing the work orders.
<b>Completed Date</b>	The date when the work orders were completed. Click the calendar icon next to the field to specify a date. Civic Platform supplies this date in the corresponding field.
<b>Detailed Description</b>	A description of the work required.
<b>Est. Prod. Units</b>	This read-only field displays the estimated cost per production unit, which is defined by the system administrator.
<b>New Status</b>	The status for the group of work orders.
<b>Opened Date</b>	The date when the work order records were created in your system. Click the calendar icon located next to the field to specify a date. Civic Platform supplies this date in the corresponding field.
<b>Priority</b>	The priority level assigned to the work orders.
<b>Reported Date</b>	The date the work orders were reported. Click the calendar icon located next to the field to specify a date. Civic Platform supplies this date in the corresponding field.
<b>Reported Time</b>	The time the work orders were reported.
<b>Status Date</b>	The date the status was set for the work order group in this field.

## Costing Fields

The table below lists and defines the fields that may be available when costing a work order.

Table 116: Costing Field Descriptions

<b>Cost Account</b>	The appropriate cost account where the units should be added or subtracted from when associating with a work order.
<b>Cost ID</b>	The identification number populates automatically when you click the Submit button.
<b>Cost Item</b>	The name for the cost item.
<b>Cost Type</b>	The appropriate cost type, such as: contract, employee, materials.
<b>Current Asset Usage</b>	<p>The current usage of the asset. This field displays only when you are assigning an asset as a cost to the work order, and the asset type is associated with usage types in the administrator portlet.</p> <p>When you fill value in this field and save, Civic Platform adds a usage record for the asset in the Assets portlet.</p>
<b>Date</b>	The date
<b>Description</b>	The description for the cost item.
<b>End Time</b>	The end time of the assignment or cost item usage. Mark "All Day Event" if applicable.
<b>Fixed Rate</b>	The fixed cost rate to be used for the cost item.
<b>Quantity</b>	<p>The quantity of items included in this type.</p> <p>If your agency administrator did not configure the Standard Choice COST_FACTOR, when you add a new cost item to a work order, the Quantity section only allows you to specify one quantity for the cost item.</p> <p>If your agency administrator configured the Standard Choice COST_FACTOR, when you add a new cost item to a work order, the Quantity section of the Cost Item New form provides several cost factors, for example, Regular, Overtime, and Holiday. You can enter quantities by cost factors.</p>
<b>Record Status</b>	This read-only field indicates whether the cost item record is active or inactive in the administrator portlet.

<b>Start Time</b>	The end time of the assignment or cost item usage. Mark "All Day Event" if applicable.
<b>Time Accounting Group</b>	The Time Accounting group for a human resource. This field displays only when you are assigning a human resource as a cost on the work order, and the selected user profile is associated with a Time Accounting group.
<b>Time Accounting Type</b>	The Time Accounting type for a human resource. This field displays only when you are assigning a human resource as a cost on the work order, and the selected user profile is associated with a Time Accounting type.
<b>Time Elapsed</b>	<p>The actual work time of the cost item (human resource). It is updated automatically if either Start Time or End Time values are modified, or you can enter a value directly into this field.</p> <p>This field displays only when you are assigning a human resource as a cost on the work order, and the selected user profile is associated with a Time Accounting type. After you enter values in Time Accounting Group, Time Accounting Type, and Time Elapsed and save, Civic Platform adds a time accounting record in the Time Accounting portlet.</p>
<b>Total Cost</b>	<p>Automatically calculated according to the formula below.</p> <p>If there are no cost factors for the cost items:</p> $\text{Total Cost} = \text{Fixed Rate} + \text{Quantity} * \text{Unit Rate} * \text{Default Cost Factor}$ <p>If there are multiple cost factors for the cost items: <math>\text{Total Cost} = \text{Fixed Rate} + \text{Unit Rate} * (\text{Cost Factor \#1} * \text{Quantity \#1} + \text{Cost Factor \#2} * \text{Quantity \#2} + \dots + \text{Cost Factor \#n} * \text{Quantity \#n})</math></p>
<b>Type</b>	The type from assignment or cost.
<b>Unit Rate</b>	The unit cost rate to be used for the cost item.
<b>Unit of Measure</b>	The unit of measure for the cost item.
<b>Updated Date</b>	This read-only field shows when the cost item is last updated in the administrator portlet.
<b>Updated By</b>	This read-only field shows the user account that last updated the cost item in the administrator portlet.
<b>Usage/Time Tracking</b>	This field contains three parts: Time Accounting Group, Time Accounting, and Time Elapsed.
<b>Work Order Task</b>	The work order task associated with the cost. Only the active or completed work order tasks display in the list. This item is not required for a cost entry. Because users can add the same task in a work order more than once, each work order task name has the <a href="#">Task Suffix</a> attached to it, for distinguishing which specific task is associated with the cost. For example, if the work order task of a cost is "on-site inspection-3", the cost is associated with the "on-site inspection" task that is added the third time to the work order.

## Work Order Task Fields

The table below lists and defines fields that may be available for Work Order tasks.

Table 117: Work Order Task Fields

<b>Actual</b>	The actual amount of time needed to complete the task, as opposed to the estimated amount of time.
<b>Comments</b>	Comments associated with the work order task. Default comments can be entered on the work order template so that they appear with the tasks on the work order when the template is used.


<b>Complete By</b>	The worker who completed the task.
<b>Complete Date</b>	The date the task is completed.
<b>Cost</b>	The total work order cost that is recorded against each specific task. Depending on user permissions, Values in the cost column or the actual may be masked, depending on permissions.
<b>Default Estimate</b>	The anticipated number of units of time, such as 3 weeks, that is needed to complete the task. If this field is not marked when adding the task to a work order template, the Duration unit option is disabled.
<b>Description</b>	Description associated with the work order task.
<b>Duration Unit</b>	The anticipated unit of time needed to complete the task, such as day or week. This field is used in conjunction with the Default Estimate field.
<b>Effective Date</b>	The date the task was first active in the software. Administrators can create tasks ahead of time to prepare for use in Civic Platform. The Effective Date must occur before the Expire Date.
<b>Allow Estimate Change</b>	The option of whether to allow changes to be made to the estimate.
<b>Expire Date</b>	The date the task is inactive in the software. This allows administrators to remove tasks while still maintaining history. The Expire Date selected must occur after the Effective Date.
<b>Order</b>	The order of the task in comparison to the other tasks in the work order. This allows for the tasks to be organized in sequential order.
<b>Record Status</b>	New work order tasks are automatically set to Active when created. When a task is deleted, it is inactivated in the software. To reactivate a task, look up inactive tasks and use the drop-down list to select the active status.
<b>Standard Operating Procedures</b>	The established or prescribed method to be followed routinely for the performance of the task. For example, "Clean sample tube with brush." To see or modify the SOP, click the link in the work order task tab, as described in <a href="#">Updating a Work Order Task</a> .
<b>Task Code</b>	The identification code number for a work order task.
<b>Task Suffix</b>	This read-only field displays the number of times that the same task is added in a work order. When a task is first added in a work order, its task suffix is 1; when it is added the second time, the task suffix is 2; and so on.
<b>Updated By</b>	The user who last updated the work order task.
<b>Updated Date</b>	The most current date the work order task record is updated.
<b>Workflow Task</b>	The workflow task that you want to associate with the work order task.
<b>Workflow Task Status</b>	The workflow task status that activates this Work Order Task.

## Work Order-Related Asset Fields

The following table defines the default work order-related asset fields.

Table 118: Work Order-Related Asset Fields

<b>Comments</b>	Comments associated with the asset.
<b>Current Value</b>	This read-only field shows the current value of the asset. The value is the result of the asset depreciation calculation that takes the current date as the depreciation end date.
<b>Date of Service</b>	The date the asset was initially placed into service.
<b>Depr. Amt</b>	This read-only field shows the decline in the asset value by the asset depreciation calculation.

<b>Depr. End Date</b>	The end date for the asset depreciation calculation.
<b>Depr. Start Date</b>	The start date for the asset depreciation calculation.
<b>Depr. Value</b>	This read-only field displays the asset value after the asset depreciation calculation.
<b>Description</b>	A description of the asset.
<b>End Location</b>	The distance between the start of a linear asset and the end of the work against the asset. If you leave this field blank, Mobile Office takes the end of the asset as the end location of the work. The unit of the end location is the same as that of the asset size.  This field is available only when you edit a linear asset.
<b>ID</b>	The identification number used to identify the asset.
<b>Last Update</b>	This read-only field indicates when the asset was last updated.
<b>Name</b>	The name of the asset.
<b>Salvage Value</b>	The residual value of the asset at the end of its useful life.
<b>Short Notes</b>	This field displays a link. If you click the link, an Edit Short Notes window displays. You can enter, view, or edit the note for the asset in the Edit Short Notes window.
<b>Size</b>	The size of the asset. This field may be required for asset types that belong to the Linear, Node-Link Linear, or Polygon class types, depending on your agency's settings. Enter the unit of measure in the Unit field.
<b>Start Location</b>	The distance between the start of a linear asset and the start of the work against the asset. If you leave this field blank, Mobile Office takes the start of the asset as the start location of the work. The unit of the start location is the same as that of the asset size.  This field is available only when you edit a linear asset.
<b>Start Value</b>	The beginning value or purchase price of the asset.
<b>Status</b>	The status of the asset. The status will default to active when a new asset is created. Changing the status of the asset will effect the maintenance, availability, and depreciation calculation of the asset.
<b>Status Date</b>	The date the asset status changed.
<b>Type</b>	The type of asset.   <b>Note:</b> After you select an asset type, some asset attributes or attribute tables may display below the standard asset fields. The attributes and attribute tables are defined by your agency administrator in the asset template that associates with the asset type. You can enter more information about the asset in the attributes or attribute tables.
<b>Unit</b>	The unit of measure for the value entered in the Size field. Your system administrator determines which units are available in this menu.
<b>Useful Life</b>	The number of years the asset is expected to be used.