



Accela Civic Platform[®]

Version 24.1

User Guide

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Getting started with Civic Platform

Civic Platform is a web-based application that supports your agency's work. The functions available in Civic Platform depend on how your agency configures it.



Note: This help system describes how Civic Platform works before customization. Contact your agency administrator or help desk with questions about any differences between this documentation and your agency's configuration.

The following pages will help you get started with Civic Platform:

- [Log in or out of Civic Platform](#)
- [Change your password](#)
- [Set dashboard preferences](#)
- [Explore the workspace home page](#)

To review some basic features of Civic Platform, see [Civic Platform basics](#).

Log in or out of Civic Platform

Your agency's name, a valid user name, and a password are all you need to log into Civic Platform. If you don't have these, contact your system administrator.



Note: These values are case sensitive.

To log in to Civic Platform

1. In your web browser, navigate to your agency's login page for Civic Platform. The URL is provided by your agency.



Note: Use the **Add this page to your favorites** link below the **Login** button for easier access to 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. Select **Login**.

To log out of Civic Platform

1. Select the **Applications** menu in the upper right corner of the page.
2. Select **Sign out**.



Note: If your session is inactive for a set period of time, the session times out and Civic Platform automatically signs you out. You may receive a session time-out warning with the option to continue the session and avoid timing out.

Change your password

Changing your login password regularly helps protect your system from unauthorized access.

Check with your agency administrator about your agency's password policy. For example, your agency may require you to change your password every 60 days.



Note: If you do not change your password within the specified time frame, you are locked out of Civic Platform and 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 upcoming password expiration date starting 15 days before expiration.

You can change your password from the login page if allowed by your agency. You may also be able to change it from within Civic Platform if allowed by your agency.

To change your password from the login page

Follow the directions on the login page. Contact your agency administrator with any questions.

To change your password within Civic Platform



Note: The ability to change your password in Civic Platform must be configured by your system administrator and may not be available if not configured. Contact your system administrator for more information.

1. From the main menu bar, select the **Launchpad** icon .
2. Select **All Pages**.
3. In the **Filter list** field, type **preference**.
4. Select **Preference management**.
5. Select the **Change password** tab.
6. Enter your old password.
7. Enter your new password in both the **New password** and **Confirm new password** fields.
8. Select **Submit**.

Set dashboard preferences

If you have access to multiple modules (such as Licensing and Enforcement) and/or multiple consoles, you can define your default workspace and switch your displayed modules and consoles from the **Preference management** page. After setting preferences, the selected default module and console selections display each time you log in.

To set user preferences

1. On the main menu bar, select the **Launchpad** icon .
2. Select the **All pages** tab.
3. In the **Filter pages** field, type **preference** to filter the list of pages.
4. Select **Preference management**.

5. Do any of the following:

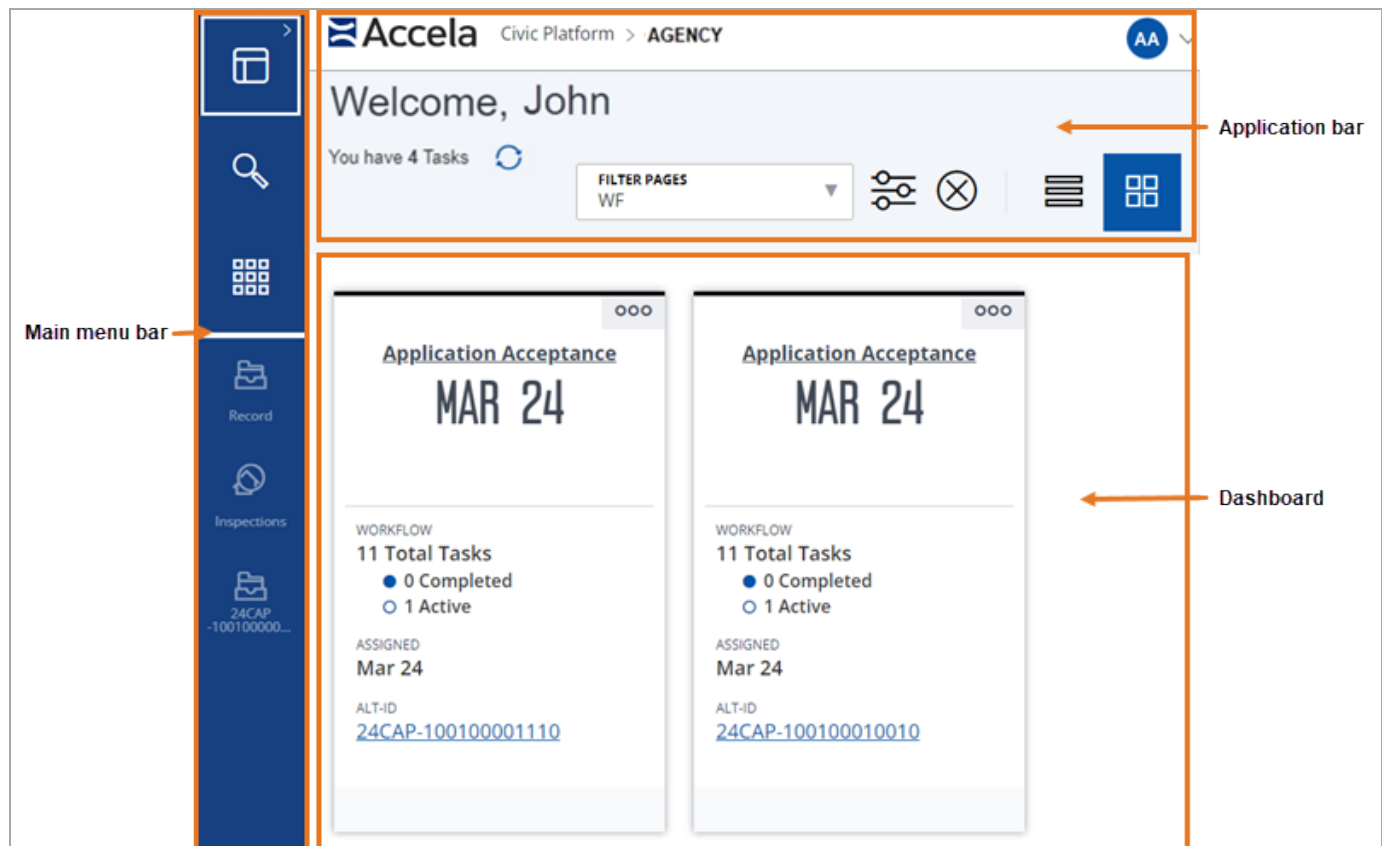
- To display only records associated with a specific view, select the desired option from the **Default module** list.
- To display only the pages and module associated with a specific view, select the desired option from the **Default console** list.
- To have Civic Platform automatically close the oldest space on the main menu bar when you add a space beyond the limit set by your agency, select the **Automatically close the oldest space** check box. Only unpinned spaces are automatically closed.

6. Select **Submit**.

Explore the workspace home page

The workspace home page is the first page you see when you log into Civic Platform (unless you have changed your default home page on the launchpad). From this page, you can access most tasks you need to perform.

Workspace home page example



The workspace home page is divided into three areas, as shown above:

1. The application bar
2. The dashboard
3. The main menu bar

The application bar

The application bar provides the following features:

- **Breadcrumb trail:** Displays your location in Civic Platform.
- **Application menu:** Provides access to Help and administration functions.
- **Filter menu:** Displays options to filter the items shown on the dashboard. Filters allow you to view only items that meet certain conditions.

See [Filters](#) for more information.

- **Filter settings:** Allows you to manage dashboard filters, including setting a default primary filter.
- **Cancel filter:** Clears the current filter and returns to the default filter.
- **Card view and List view buttons:** Allows you to switch between Card view and List view on the Task dashboard.

The dashboard

In the dashboard area, you can view two different dashboards:

- The **Task dashboard** displays tasks and calendar items to allow you to track your work. You can view items as cards or as a list. Each view has distinct benefits, and you can switch between views as needed.

See [Task dashboard](#) for more information.

- The **Map dashboard** provides you with a way to identify and analyze land use, zoning, inspection or service request routes, infrastructure, and other geocentric information.

See [Map dashboard](#) for more information.

You can toggle between the two dashboards by selecting the **Dashboard** button on the main menu bar.

The main menu bar

The main menu bar provides the following options:

- **Dashboard button:** Returns you to the dashboard if you are not currently there. Selecting the arrow on the top right of the button allows you to toggle between the Task dashboard and the Map dashboard.
- **Global search button:** Displays the **Global search** page, which allows you to perform basic and advanced searches.

See [Global search](#) for more information.

Launchpad button: Toggles the launchpad, which provides quick access to most pages. By default, the **Your pages** tab is selected.

- To display a list of all pages, select **All pages**.
- To filter the list of pages you're on, type the desired text in the **Filter pages** box.
- To select a new default home page, hover over the desired page and select the  icon.

See [Launchpad](#) for more information.

- **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 bar. The space buttons on the main menu bar give you quick access to any page you have open. Records and data sets open to separate spaces so you can more easily manage multiple projects at once.

See [Spaces](#) for more information.

Civic Platform basics

Understanding the basic functions of Civic Platform helps you perform your job effectively. The links below provide information about these basic functions.



Note: Your agency may configure Civic Platform to provide additional functionality. Contact your agency administrator with questions.

- [Task dashboard](#)
- [Map dashboard](#)
- [Launchpad](#)
- [Global search](#)
- [Filters](#)
- [Spaces](#)
- [List and form pages](#)
- [Task management](#)
- [View information across agencies](#)

Task dashboard

The Task dashboard displays tasks and calendar items so you can track your work.

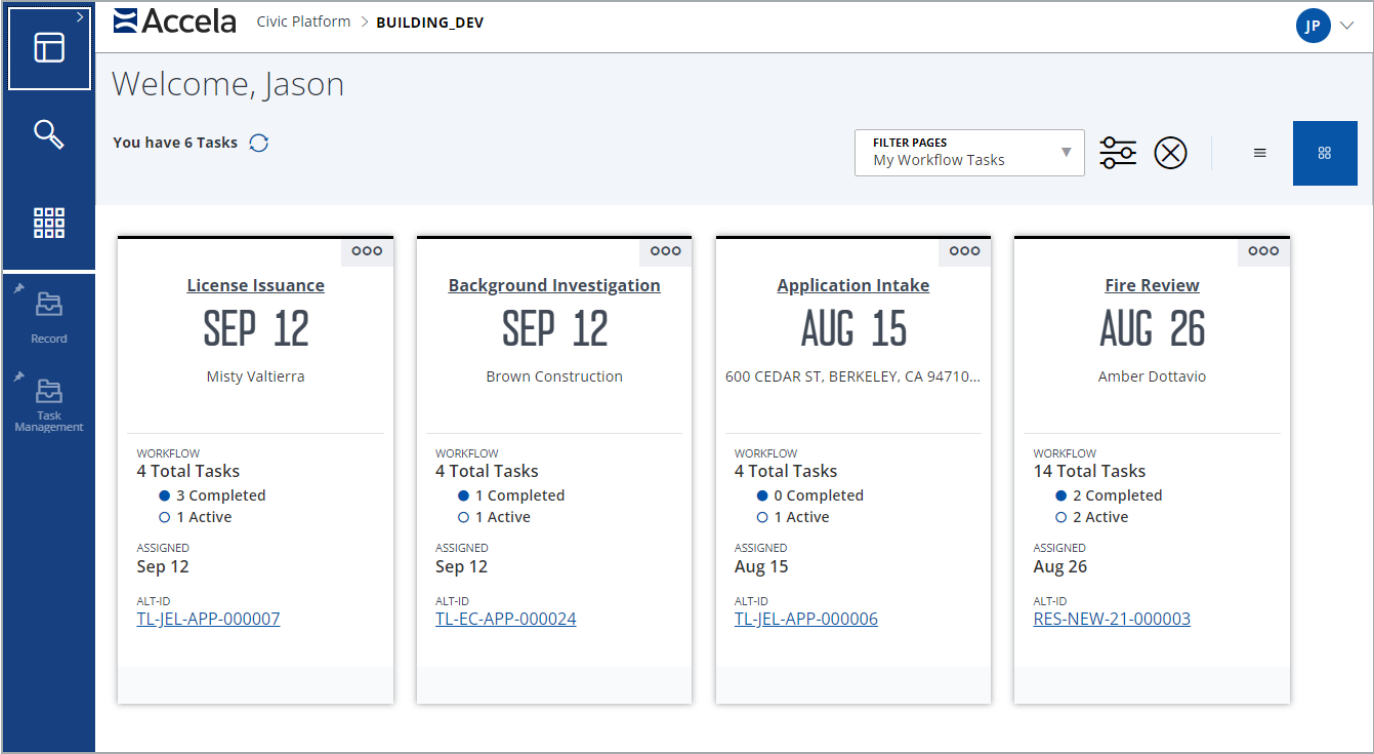
Task dashboard views

Tasks on the dashboard can be viewed as cards or as a list. Each view has distinct benefits, and you can switch between views as needed.

Card view

This is the default view for the Task dashboard. Cards provide a visual for browsing, but they also provide relevant information to help you complete the task. A predefined number of tasks display by default when the page first loads. Use the **Load more** link to view more of your tasks.

Card view screen example



Features of a task card

Below are features which commonly appear on task cards. You may see more or fewer items, depending on the task and on the way your system is configured.

Feature	Description
Card titles	Task card titles tell you at a glance what the task is. Select a card's title to open the task details in a new space.  If the task name displays in black text, you do not have permission to view the task details.
Times/dates	Most tasks have a scheduled time and date, a due date, or another relevant date (such as the date of the last status change). This information displays in different locations on the card, depending on the type of task.
Description	Some tasks have a short description of the activity or task to be performed.
Workflow	The workflow displays the total tasks, the number completed, and the number active.
Alt ID	The ID provides a unique identifier for the task. Select the ID link to open the record details.
Other details	Task-centric details can tell you something about how you should interact with that task. Different task types offer different details, such as the due date, addresses necessary for the inspection, the group assigned to the task, etc.
Options button	Every task card has an options button  that provides you with a list of actions you can perform on the task. The Options button may also provide a hyperlink to access

Feature	Description
	relevant records, such as a permit record or a primary contact. The actions you can perform vary by task type.
Status	Status options indicate where the task is in its progress. The available options may vary depending on the type of task.

List view

The list view displays tasks in a table format. This can be useful when you want to compare like values for differing tasks. A predefined number of tasks display by default when the page first loads. Use the **Load more** link to view more tasks.

List view screen example

Accela

Civic Platform > AGENCY

AA

Welcome, Accela

You have 4 Tasks

select tasks to view
available actions to take

FILTER

No Selection

ACTIONS

No Selection

	TASK ITEM	DUE DATE	STATUS	APPLICATION NAME	DETAILS
☒	APPLICATION SUBMITTAL BLD-2018-03567	15:00 PM Oct 3		22405 PA, NE 68022	Address not defined
☐	BUILDING REVIEW 18CAP-00000386	13:00 PM Oct 3		12 E Camino Raman Ave, Apt# SAN RAMON, CA 94583 :	Address not defined
☐	FRAME BLD-2018-03577	0:00 AM Sep 30	Passed	2345 E gurg Blvd, Suite# SAN RAMON, CA :	2345 - 2345 E gurg Blvd, Suite# SAN RAMON, CA
☐	FOOTINGS & FORMS BLD-2018-03577	Sep 24	Scheduled	2345 E gurg Blvd, Suite# SAN RAMON, CA :	2345 - 2345 E gurg Blvd, Suite# SAN RAMON, CA

Options on the task list view

- To display task details, select a task link in the **Task item** column .
- To perform actions on one or more tasks, select the check box next to each task, and then select the desired action from the **Actions** menu. The available actions vary, depending on the type and quantity of tasks selected.

Filter tasks on the dashboard

You can select which tasks appear on the dashboard by using filters. Available filters appear in the **Filter pages** menu. For more information about creating filters or setting a filter as the default, see [Filters](#)



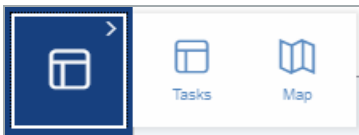
Example: You have a filter called **Scheduled tomorrow** that filters by tomorrow's date. When you select that filter, only the tasks scheduled for tomorrow display on the dashboard.

Toggle between dashboards

The Task dashboard displays by default when you log in or when you return to the home page. However, a Map dashboard is also available that offers a map-centric view. The dashboard toggle, located at the top of the main menu bar, lets you switch between the two dashboards.

To toggle between dashboards

Select the dashboard toggle at the top of the main menu bar and select either the **Tasks** or **Map** icon.



Map dashboard

The **Map dashboard** displays a graphical rendition of records, including addresses, parcels, inspections, and more. From this dashboard, you can view records, create records, search for records, and attach assets to records.

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



Note: The Map dashboard is only available if configured by your agency administrator.

Open the Map dashboard

1. On the main menu bar, select the dashboard toggle .
2. Select the **Map** icon .

Advanced search

When you open the Map dashboard, **Advanced search** displays on the left side of the map.



Note: Select the arrow on the right of the Advanced search panel to hide it. Select the arrow again to reopen it.

To perform an advanced search

1. From the **Type** menu, select the type of search you want to perform.



Note: In the filter field that appears at the top of the list, you can type part or all of a search type to filter the list.

2. On the form that appears, complete the desired fields.
3. Select **Show results**.

Map options

The following options appear on the right side and bottom of the map.

Options	Description
Zoom	Allows you to zoom in and out on the map. You can also zoom in by double-clicking, or zoom in and out by using a mouse wheel. Pan the map by holding down your mouse button on a spot and dragging the mouse.
Home	Displays the default view, or the initial area shown on the map. The default view is configured by the administrator of the map service provider.
Locate me	Finds your current location according to your browser.
Basemap	Allows you to choose the type of basemap.
Layers	Allows you to view GIS map layers.
Measure	Allows you to select the unit of measure for an area, distance, or the geographic longitude/latitude location to measure on the map.
Draw	Allows you to add a line, shape, or text to the map.
Print	Allows you to print the map to a PDF or another selected format.
MultiSelect	Allows you to select a specific area on the map by drawing a line or shape.
Heat map	By default, locations are plotted on the map with pins. Select Heat map to show locations using gradient hotspots. Select Heat map again to return to pin view.
Map scale	Shows the ratio of measurement on a map compared to the actual distance. The scale and unit of measurement are provided by the map service.
Map legend	Shows an explanation of the map symbols as provided by the map service.

Navigate map panels

When you select multiple objects on the Map dashboard, a panel displays listing the selected objects, 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.

Navigation arrows

You can return to a previous view or close the panel:

- The left-facing arrow  returns you to a previous view.
- The x in the upper right corner closes the panel.



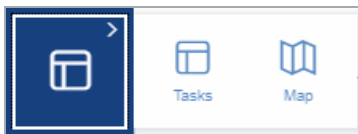
Note: If you close a panel, any selected objects are deselected.

Toggle between dashboards

The dashboard toggle, located at the top of the main menu bar, lets you switch between the Map and Task dashboards.

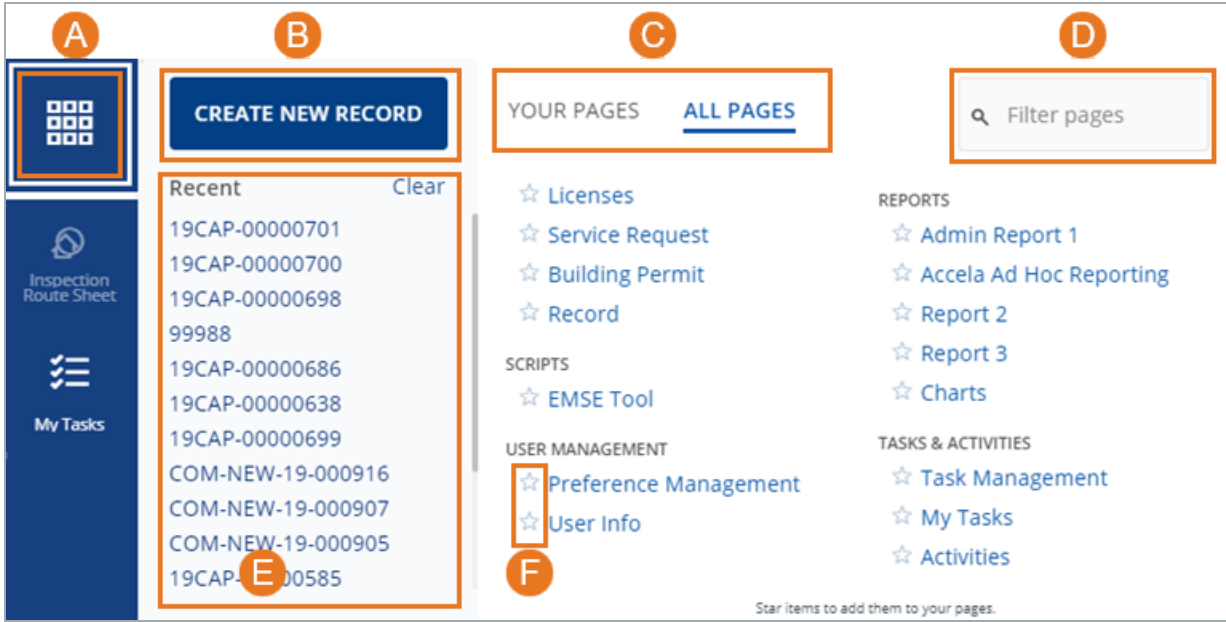
To toggle between dashboards

1. At the top of the main menu bar, select the dashboard toggle .
2. Select either the **Tasks** or **Map** icon.



Launchpad

The launchpad provides quick access to your pages, along with other helpful features. Open the launchpad by selecting the **Launchpad** icon on the main menu bar.



#	Description
A	The Launchpad icon. Select this icon to open or close the launchpad.
B	The Create new record button. See Create a new record for more information.
C	The Your pages and All pages tabs. • Your pages displays pages you have marked as favorites on the All pages tab (see F below). When you open the launchpad, Your pages is selected by default. Pages are displayed in the order in which you added them. They can be reordered by dragging and dropping them to a new location. • All pages displays all the pages available to you. These pages display in two columns, grouped by category. Categories are sorted alphabetically, as are pages within a category. The pages you see depend on your agency's configuration of Civic Platform.
D	The Filter pages field. Enter part or all of a page name to see only matching pages.
E	Recent record list. This section displays a list of recently-viewed records. Select a record to open it. You can clear the Recent record list by selecting Clear .
F	The favorite star. On the All pages tab, select the star next to the page you want to mark as a favorite and add to the Your pages tab. To remove a page from the Your pages tab, clear the star next to that page.

Select a new home page

On the **Your pages** tab, you can select a new home page (the page that appears when you first open Civic Platform).

To select a new home page

1. On the main menu bar, select the **Launchpad** icon .
2. On the **Your pages** tab, hover over the desired page and select the  icon.

Filter pages

Filtering enables you to locate a page quickly. Filtering is available for both **All pages** and **Your pages**. Text you enter in the **Filter pages** field persists when you move from one tab to another.

To find a page by filtering

1. On the main menu bar, select the **Launchpad** icon .
2. In the **Filter pages** field, enter part or all of a page name. Results are displayed as you type.

Recent records list

The launchpad provides a list of recently-viewed records. Records display in the order in which they were last accessed, most recent first. The default maximum records that display is 10. This number can be modified by your agency administrator.

You can select any record in the list to launch it in a new space. You can also clear the list by selecting **Clear**. After clearing the list, an **Undo** option appears. Selecting **Undo** restores the items just cleared.



Note: If you close the launchpad after clearing recent items, you can no longer restore them.

Global search

Global search allows you to find records quickly by entering simple search criteria in the search box. You can also use advanced search features to narrow your search results. See [Advanced search features](#) for more information. After a search, you can export your results to CSV format. See [Export search results](#) for more information.

The information included in the results varies by the type of record.

To perform a basic global search

1. On the main menu bar, select the **Global search** button .
2. In the search box, enter the search criteria—for example, a name or a record number.



Notes:



- A minimum of 3 characters is required to conduct a search. You can include letters, numbers, and some special characters (such as <, ', %, !, &, >, +, ^, /) in your search terms. However, you cannot use HTML.
- By default, inactive records are not included in global searches. To include them, select the **Include inactive records** check box.
- Searches are not case sensitive. For example, a search for *james* will display results for *james*, *James*, and *JAMES*.

3. Select the **Search** button (you can also press **Enter**).

Search results are grouped by record type.

Accela Civic Platform > BUSINESS_DEV JP

Directory
☐ Include Inactive Records

Search results grouped by type

Search: rose st SEARCH

☒ Show only exact matches

EVERYTHING (407) RECORDS (0) LOCATIONS (201) LICENSE PROFESSIONALS (0) DOCUMENTS (0) ASSETS (0) CONTACTS (0) **PARCELS (206)**

206 Results for "rose st" in Parcels



Note: Search results are available for the duration of your work session. If you navigate to another space (for example, you open a record), you can select the **Global search** button to return to your last search results.

Advanced search features

Global search offers the following advanced search features to help you narrow your search in Civic Platform.

Wildcard search

- Use an asterisk (*) to represent zero to multiple characters.



Examples:

- `val*` brings up results that contain `val` with no characters or any characters afterward—for example, `val`, `valley` and `Valerie`.

The screenshot shows the Accela Civic Platform interface. The top navigation bar includes the Accela logo, 'Civic Platform > BUSINESS_DEV', and a user profile 'JP'. The left sidebar contains icons for a folder, search, grid, and 'Batch Job Manager'. The main content area is titled 'Directory' and features a search bar with 'val*' entered and a 'SEARCH' button. Below the search bar are checkboxes for 'Include Inactive Records' and 'Show only exact matches'. A tab bar shows categories: 'EVERYTHING (329)', 'RECORDS (15)', 'LOCATIONS (126)', 'LICENSE PROFESSIONALS (0)', 'DOCUMENTS (0)', and 'ASSETS (0)'. The results section is titled '126 Results for "val" in Locations' and displays a table with three columns: ADDRESS, PARCEL, and OWNER.

ADDRESS	PARCEL	OWNER
0- VALLEY ST. BERKELEY, CA 94702	056 192102000	DEMERSON WILLARD J TR
1180- MILLER AVE, BERKELEY, CA 94708	063 298301400	SOARES VALERIE and RABINOWITZ DA

- `*wick` brings up results that contain the word `wick`, as well as words that end with `wick`—for example, `wick`, `Southwick` and `Candlewick`.
- `sm*th` brings up results that contain words starting with `sm` and ending with `th` with no characters or any characters in between—for example, `Smith`, `Smyth`, and `smooth`.
- `sm*th*` brings up the same results as `sm*th`, plus words that have additional characters at the end, such as `smythe` and `smithey`.



Note: In previous versions of Civic Platform, global search used the percent symbol (%) as a wildcard. The asterisk (*) replaces this wildcard.

- Use a question mark (?) to represent a single character. For example: `?ary` brings up `Gary` as well as `Mary`, but not `Shary`.

☰

🔍

📊

🔄 Batch Job Manager

📁

Accela

Civic Platform > BUSINESS_DEV

JP

Directory

☐ Include Inactive Records

☐ Show only exact matches

SEARCH

EVERYTHING (999)

RECORDS (7)

LOCATIONS (493)

LICENSE PROFESSIONALS (1)

DOCUMENTS (0)

ASSETS (0)

493 Results for "?ary" in Locations

ADDRESS	PARCEL	OWNER
1106- KEITH AVE.BERKELEY .CA 94708	063 298802700	SMITH MATTIE and MARY R
1036- PARK HILLS RD.BERKELEY .CA 94708	063 314005500	TSUKAMOTO GARY S and LESLIE K TR

String search

- Multiple words with spaces between them bring up search results that have one or more of the words, but not necessarily all. Hyphens are treated as spaces.
- To return an exact phrase in the search results, do one of the following:
 - After entering the search terms, select **Show only exact matches** below the search box.
 - Enclose the search terms in double or single quotation marks (" or ').



Examples:

rose st returns results that have either rose or st in the results, not necessarily both.

☰

🔍

📊

🔄 Batch Job Manager

📁

Accela

Civic Platform > BUSINESS_DEV

JP

Directory

☐ Include Inactive Records

☐ Show only exact matches

SEARCH

EVERYTHING (20182)

RECORDS (159)

LOCATIONS (10000)

LICENSE PROFESSIONALS (12)

DOCUMENTS (0)

ASSETS (0)

CONTACTS (11)

10000 Results for "rose st" in Parcels

PARCEL	ADDRESS	OWNER
059 228609600	1494- ROSE ST.BERKELEY .CA 94702	NASH NANCY and TEMPKIN LEE TRS
059 228610100	1520- SACRAMENTO ST.BERKELEY .CA 94702	MOST STEPHEN and SCHOEN CLAIRE
059 228610200	1524- SACRAMENTO ST.BERKELEY .CA 94702	MORRELL ROSE F TR

- ✓ Selecting **Show only exact matches** or using quotation marks ("rose st") returns results with that exact phrase.

Accela Civic Platform > BUSINESS_DEV

Directory

☐ Include Inactive Records

☒ Show only exact matches

206 Results for "rose st" in Parcels

PARCEL	ADDRESS	OWNER
059 229200100	1242- ROSE ST, BERKELEY, CA 94702	MCKETNEY EDWIN C and MORGAN MARY
059 229200201	1246- ROSE ST, BERKELEY, CA 94702	8616.00000000
059 229200300	1250- ROSE ST, BERKELEY, CA 94702	MENDEZ CARLOS F and SARA

Advanced search (Records tab only)

After performing a basic search, you can perform an advanced search on the Records tab (this option is not available on the other tabs).



Note: Doing an advanced search starts a completely new search; it does not use the previous search terms.

To perform an advanced record search

1. Perform a basic global search, and then select the **Records** tab.
2. Select **Search tools** to display the **Record search tools** page.

Below each field name on this page (such as Application name or Status), there are two fields:

- The first field is a filter list with options such as **Contains** or **Is not**. Use these to refine your search.

Options in the filter list

The table below describes the options you may see in the filter list. The options available depend on the second field.

Operator	Search result
Contains	Include results where the field contains the search term(s) anywhere.
Starts with	Include results where the field begins with the search term(s).
Ends with	Include results where the field ends with the search term(s).
IS	Include results where the field is equal to the search term(s).
Is Not	Include results where the field is not equal to the search term(s).
Is Any Of	Include results that match multiple search terms. These search terms may be selected from a calendar or list. They may also be typed in the field, separated by commas.
Is Before	Numeric or date only. Include results that are before the date or number specified.
Is After	Numeric or date only. Include results that are after the date or number specified.
Is On or Before	Numeric or date only. Include results that are on or before the date or number specified.
Is On or After	Numeric or date only. Include results that are on or after the date or number specified.
Is Between	Include results that are between two values. Use commas to separate the two values.

- The second field may be a text field where you can enter search term(s), or it may be a list. If the field is a list:
 - Selecting the field displays the list of options with a filter box at the top. If you know the option you want, you can type it in the filter box to find it quickly.
 - Depending on the option selected in the first field, you may be able to select multiple options in the second field.

A screenshot of a search filter dropdown menu. The title bar at the top says "Active, Approved" with a close button (X) and a dropdown arrow (v). Below the title bar is a search input field with a magnifying glass icon and a clear button (X). Below the search field is a list of options, each with a checkbox: "About to expire", "Active" (checked), "Additional Info Required", "Approved" (checked and highlighted with a blue border), and "Approved for Issuance".

3. On the **Record search tools form**, do the following for each record field you want to include in the search:

1. From the first field (the filter list), make the desired selection.
2. In the second field, type or select the desired search term(s).



Note: You can enter search criteria in any combination of available fields.



Example: Suppose you want to find records that were *not* created on a certain date. From the filter list under **Created date**, you would select **Is not**. In the second field under **Created date**, you would enter the date you want to exclude.

4. Select **Update**.

Refine an advanced search (Records tab only)

1. Perform an advanced search, and then select **Search tools** again.
2. Make the desired changes.



Notes:

- If you make changes and decide you want to revert to your previous search terms before doing the search, select **Clear**
- To remove all search terms, **Reset all filters**.

3. Select **Update**.

Export search results

Only search results on the **Records** tab can be exported. The export format is CSV (comma separated values), which can be read by spreadsheet applications such as Excel or Google Sheets.

To export search results:

1. Perform a basic global search, and then select the **Records** tab.
2. Select **Export results**.

The screenshot shows the Accela Civic Platform interface. At the top, there's a search bar with 'Cedar NW' entered and a 'SEARCH' button. Below the search bar, there are tabs for 'EVERYTHING (717)', 'RECORDS (25)', 'LOCATIONS (340)', 'LICENSE PROFESSIONALS (0)', 'DOCUMENTS (0)', 'ASSETS (0)', and 'CONTACTS (1)'. The 'RECORDS (25)' tab is selected. To the right of the tabs, there's a 'Search Tools' button. Below the tabs, the text '25 Results for "Cedar NW" in Records from BUILDING_DEV' is displayed. A red arrow points from the 'RECORDS (25)' tab to the 'Export Results' button, which is highlighted with a red box. Below this, a table of results is shown with columns: RECORD, RECORD ALIAS NAME, APPLICATION NAME, STATUS, APPLICANT, and RECORD TYPE. The first row shows a record with ID 'RES-ALT-22-000010', alias 'Residential Alteration Permit', application '126 THE UPLANDS, BERKELEY, CA 94705', status 'Pending', applicant 'Krista', and record type 'Building/Residential/Alteration/NA'.

Filters

Filters allow you to display items that meet certain criteria. For example, you can create a filter that displays only records assigned to a certain department or even a certain individual.

Filters are typically used to refine an existing list, such as a list of tasks or search results.



Note: Your agency administrator may set up filters for you to use. You can also create your own filters.

When filters are available for a page, a **My filters** menu appears near the top of the page.

Filters are also available on the Task dashboard. You can filter tasks by selecting an option from the **Filter pages** list. You can manage filters by selecting the filter options button  or clear a filter by selecting the clear filter button .

Create a new filter



Note: When creating a filter, you can use the % wildcard to represent zero or more characters. For example, when building a filter to find all records related to work on water mains, you can enter **water%main**. This filter will find results containing *watermain* and *water main*.

To create a new filter

- 1. Do one of the following:
 - On the page where you want to add a new filter, select **Menu > My filters**.
 - On the **Task dashboard** page, select the filter options button .
- 2. Select **New**.
- 3. Complete the following fields.

Field	Action
Name	Enter a name for the filter. This name appears in the filter menu, so choose a name that is concise and meaningful.
Description	Describe the purpose of the filter.
Primary	Select Yes to designate the current filter as the primary. The default setting is No .

 **Notes:**

- When you set a filter as primary, it is applied automatically when you open the page.
- You do not need to select a primary filter.
- Only one filter can be primary at a time. When you assign a filter as the primary, Civic Platform resets the **Primary** field for all other filters to **No**.

- 4. In the **Search by** section, build your query using the options described below.

Search By *

☐

--Select--

=



AND

#	Description
A	For most filters, you can leave this box blank. If you are creating a complex query that requires parentheses to group operations, you can enter an open (left) parenthesis. (The corresponding right parenthesis is entered in the second to last field.)
B	Choose the desired field. The current page determines the available filter fields. For example: • The filter fields for the Task dashboard page include options for filtering your tasks. • The filter fields for Record list page include all the record fields in the record search

#	Description
	form, plus Application-specific info, Address template, Owner template, Parcel template, and Module name. - The filter fields for other pages are the fields that display in the search form of each page.  Notes: - If the Application-specific info (ASI) option is available and you select it, 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 select the desired ASI field in the ASI field tree. - If Address template, Parcel template, or Owner template are available and you select one of them, Civic Platform displays all the active template attributes in a pop-up window. Select the desired attribute.
C	Choose the desired relational operator. For a list of available operators, see Relational operators .
D	Specify the specific value or variable against which you want to compare the data in field B. You can manually enter a value in this field, or you can select the Variable picker button  to the right of the field and select a variable from the Variable list. For a list of variables, see Filter variables. - If you select a user-name-related field for 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 pages and filter fields, see User-name-related list pages and search by fields. - If you select a variable for a name field, Civic Platform turns the three fields into a read-only Full name field and populates the field with the specified variable.
E	For most filters, you can leave this box blank. If you are creating a complex query that requires parentheses to group operations properly, you can enter a close (right) parenthesis. (The corresponding left parenthesis is entered in first field.)
F	Select a logical operator in this field if you are querying additional fields (for example, you want to query by date and/or location). - Select 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. If you don't get the results you are expecting, try using parentheses to group operations.
5.	To add another field to the filter, select the New field button and repeat step 4.
6.	(Optional) Select the Preview SQL button to view the SQL query that will run when the filter is applied.
7.	Select Submit to save the filter.

Modify or delete an existing filter

You can modify or delete filters that you created. However, you cannot modify or delete filters created by administrators.

To modify or delete a filter

1. Do one of the following:
 - On the page where you want to modify or delete a filter, select **Menu > My filters**.
 - On the **Task dashboard** page, select the filter options button .



Note: You must have the correct permissions to modify or delete filters. If you do not have permissions, the check box next to those filters will be disabled. You can still view the filter by selecting the filter name link.

2. Do one of the following:
 - To modify a filter:
 1. Select the filter name link.
 2. Make updates as needed and select **Submit**.
 - To delete a filter:
 1. Select the check box next to the filter name link.
 2. Select **Delete**.

Apply an existing filter to a list page

1. On the desired page, do one of the following:
 - On the page toolbar, select the **My filters** list and select the filter you want to apply.
 - Select a module from the **Module** list and select a module-specific filter from the **My filters** list.



Note: Select **Select** from the **My filters** list to reset the filters to the default.

Set the primary filter

You can make one filter the primary filter. When you designate a filter as **Primary**, Civic Platform automatically applies that filter each time you open the page or tab.

**Note:** Only one filter can be primary at a time. When you assign a filter as the primary, Civic Platform resets the **Primary** field for all other filters to **No**.

1. Do one of the following:
 - On the page where you want to add a new filter, select **Menu > My filters**.
 - On the **Task dashboard** page, select the filter options button .
2. Select the filter name link.
3. Do one of the following:
 - For filters you do not have permission to edit, select the **Primary** button, and then select **Cancel** to return to the **My filters** page.
 - For filters you have permission to edit, select **Yes** in the **Primary** field and select **Submit**.
4. Return to the list page or the **Task dashboard** and select the **Refresh** button.

**Note:** The page displays the results for the specific filter chosen. In addition:

- On the page list, the **My filter** menu displays the primary filter (if any).
- On the **Task dashboard**, the **Filter pages** menu displays the primary filter (if any).

Filter variables

You can use variables to build queries on the filter form. Variables are placeholders that are populated automatically by the system.

**Example:** If you choose the **\$\$DEPARTMENT\$\$** variable, **\$\$DEPARTMENT\$\$** will be replaced with the current user's department when the filter is applied.

Variable	Description
\$\$DEPARTMENT\$\$	The department to which the current user belongs.
\$\$GAUSER ID\$\$	The logged in user's ID.
\$\$GROUP\$\$	The logged in user's user group.
\$\$MODULE\$\$	The name of the module for which the query is applicable.
\$\$ORGANIZATION\$\$	All organizations. A Citizen Access term.
\$\$OWNORGANIZATION\$\$	The logged in user's organizations. A Citizen Access term.
\$\$OWNLICENSE\$\$	The logged in user's licenses. A Citizen Access term.
\$\$PUBLICUSER_EMAIL\$\$	The logged in user's email. A Citizen Access term.

Variable	Description
\$\$SERV_PROV_CODE\$\$	The login user's agency code
\$\$TODAY\$\$	Today's date (the workstation system date).
\$\$TODAY-n\$\$	A date in the past, calculated from today's date. Replace n with the desired number of days. For example: Enter <code>\$\$TODAY-7\$\$</code> in the Start date field to indicate a date 7 days in the past.
	 Note: If <code>\$\$TODAY-n\$\$</code> does not appear as an option in the variable list, you can enter it manually.
\$\$TODAY+n\$\$	A date in the future, calculated from today's date. Replace n with the desired number of days. For example: Enter <code>\$\$TODAY+7\$\$</code> in the End date field to indicate a date 7 days in the future.
\$\$USERID\$\$	The ID of the user currently logged on.
\$\$USERFULLNAME\$\$	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.

 **Example:** If you choose the **City** field and enter Portland as a value, you can then select a relational operator to define the data you want to find. If you want records for Portland, you can use `=`. If you want records for everywhere except Portland, you can use `!=`. The table below lists the default relational operators.

Operators	Description
=	Equal to
!=	Not equal to
<	Less than
<=	Less than or equal to
>	Greater than
>=	Greater than or equal to
LIKE	Begins with the field value
IS NULL	Empty (no field value entered)
IS NOT NULL	Not empty (field value entered)
CONTAINS	Contains the exact field value

User-name-related list pages and search by fields

List pages	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 Requester
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 Requester
Set conditions of approval list	Action by user Applied by user

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 bar. These buttons provide quick access to any page you have open. Records and data sets open to separate spaces to help you better manage multiple projects.

 **Note:** A space on the main menu bar 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 Civic Platform.

View spaces

Your agency configures the number of spaces that can be displayed on the main menu bar. The most recently opened space displays at the top. When you add more than three spaces, a **More** icon appears at the bottom of the space icons. Selecting **More** displays any additional spaces, up to the limit set by your agency.

You can set Civic Platform to close the oldest space automatically when you open more than your allowed limit. Otherwise, you must manually close a space before you can add another one.

To have the oldest space closed automatically

1. On the main menu bar, select the **Launchpad** icon .
2. Select **All Pages**.
3. Find and open **Preference management**.
4. Select the check box next to **Automatically close the oldest space**.
5. Select **Submit**.



Note: Adding more than the allowed number of spaces will add the new space to the end of the current spaces, and the oldest one will be closed. Only unpinned spaces are closed automatically.

If you try to open more than the allowed number of spaces without having the oldest one closed automatically, you will see a warning message. You have two options:

- You can click **Cancel** on the message and manually remove one or more spaces from the main menu bar.
- You can click **Automatically close the oldest space**, and then select **Submit**.

Pin, unpin, and close spaces

If you frequently work with certain records or pages, you can open the record or page in a space and pin it to the main menu bar (up to a maximum of one less than your allowed limit). Pinned spaces stay on the main menu bar until you unpin them.



Note: Pinning a space does not prevent it from being moved on the main menu bar if you open other spaces.

To pin, unpin, or close a space

1. Hover over the desired space icon. Two small icons appear in the upper corners of the space button.
2. Do one of the following:
 - To pin a space, select the **Pin** icon . The icon changes to a solid pin to indicate that the space is pinned.



If you reach the limit of pinned spaces and try to pin another space, a warning message displays, informing you that a space must be unpinned or closed before you can continue.

- To unpin a space, select the **Unpin** icon . The icon disappears to indicate that the space is no longer pinned.

- To close a space, select the **Close** icon .

When you close a space, it is removed from the main menu bar. Closing a pinned space unpins it.

List and form pages

Civic Platform uses lists and forms to display the information you work with. Both are customizable and may vary from the descriptions in this documentation, depending on how your agency has configured Civic Platform. However, the general layout of lists and forms is consistent.

List pages

A list page displays a list of items in Civic Platform. A list page may include work orders, assets, permit, applications, service requests, addresses, contacts and more. A list may also be the result of a search.

Civic Platform provides you with ways to manage lists, such as sorting, filtering, organizing, and exporting.

List page example

Record

Record

Accela

Civic Platform > BUILDING_DEV

JP

Menu

Search

New

Delete

GIS

Create a Set

View Log

Reports

Help

My Filters

--Select--

Module

Building

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☐	Record #	Status	Record Type	Opened Date	Application Name	Street #	Dir	Street Name	Type	Unit #	Assigned D
☐	RES-SOLAR-24-000001	Pending	Residential Solar/PV Permit	02/14/2024							
☐	COM-ADD-24-000001	Pending	Commercial Addition Permit	02/08/2024							
☐	RES-ELC-23-000001	Pending	Residential Electrical Permit	12/01/2023							
☐	RES-DEM-23-000001	Pending	Residential Demolition Permit	11/30/2023							
☐	RES-POOL-23-000001	Pending	Residential Pool/Spa Permit	11/30/2023							
☐	RES-ADD-23-000001	Pending	Residential Addition Permit	10/11/2023							
☐	COM-ACC-23-000001	Pending	Commercial Accessory Structure Permit	08/09/2023							
☐	MISC-ELEV-23-000001	Pending	Elevator Permit	08/09/2023							
☐	MISC-ELEV-23-000002	Pending	Elevator Permit	08/09/2023							
☐	MISC-ELEV-23-000003	Pending	Elevator Permit	08/09/2023							

Page

1

of 10

<

>

Features available on a list

- To sort the list, select any column title.
- To adjust the number of records displayed, select the **Menu** button, and then select **Expand list** or **Contract list**.

- To customize how information displays in a list, select the **Menu** button, and then select **Customize content**. You can specify the field display, including the field sequence and field width. You can also organize and sort lists by assigning a display or sort order. For more information, see [Customize content](#) or .
- To export a list in CSV format, see .

Contact your agency administrator to change the layout of a list page.

Form pages

Form pages display fields that provide details about a single object such as a permit, service request, or address. Some fields contain information you can edit. Fields may require you to enter only numbers or only dates. A field may also require you to select an option from a menu.

Form pages are also used to search for existing records and to create new records.

Form page example

The screenshot shows a web-based form for a record identified as COM-ADD-24-000001. The form is titled 'Brighton Addition' and is currently in a 'Pending' status, dated 02/08/2024. The form is divided into several sections: Summary, Record, Status, Activities (0), Workflow, Inspections (0), Fee (1), Payment, Custom Fields, TEST, Data Tables (2), Contacts (1), Professionals (1), Related Records, Documents (0), Communications (0), Trust Accounts (0), Renewal Info, and Address (1). The main form area contains fields for Record #, Opened Date, Status, Record Type, Application Name, Detailed Description, Total Fee Invoiced, Total Paid, Balance, Assigned to Department, Assigned to Staff, Channel Reported, First Issued Date, Reported Date, and various completion/closed dates. A sidebar on the left provides navigation options for different parts of the record.



Note: Menu 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.

Page menus

List and form pages in Civic Platform have a page menu at the top of the page that consists of buttons and menus that perform actions on that page.



Page menus display different options depending on the page you have open and how your agency has configured and customized those pages. Please contact your Agency Administrator or Help Desk if you have specific questions about your page menu.

Page menu example

Record

Menu

Search

New

Delete

GIS

Create a Set

View Log

Reports

Help

My Filters

--Select--

Module

Building

The **Menu** button has customized options that, if configured, allows you to customize your page, export a list to CSV, view filters, print the page, and more.

Customize content

The **Customize content** feature allows you to define how you want a page list to display. First, choose the fields you want to display on the page 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. From a list page, hover over **Menu** and select **Customize content**.

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

Building Permits

Save

Reset

Cancel

Help

Available Fields

Reported Date

Record Info

Selected Fields

Alternate ID

Record Type

Active Task

Opened Date

Created By

Status

Status Date

Description

Contract

Expand

Number of Records

5

20

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

2. Show or hide fields for page display. Fields in the **Selected fields** list box display in the page view. Fields in the **Available fields** list box do not display in the page view.

1. Select a field name to highlight it. Press the **Ctrl** key to choose multiple fields at a time.
2. Use the arrow keys to move the fields between the **Available fields** or **Selected fields** boxes.

 **Note:** Double arrow keys move all fields, whether selected or not, to the destination box.

3. Arrange the sequence of the fields in the **Selected fields** box.
 1. Select a field name.
 2. Use the up and down arrow buttons to move the field.
4. Complete the remaining fields as necessary.

Field	Description
Display Order	Where the field displays in the field order (from left to right).
Element	A list of fields in the Selected Fields box in their current order.
Label	Label for a field. Agencies can customize this value as needed.
Width (pixels)	The column width in pixels.

5. Select **Submit**.

Task management

The **Task management** page allows you to view, create, edit, and assign tasks. You can also perform other actions on a task. Those actions vary depending on which type of task you are changing. After you assign a task, that task appears on the My task page of the person who is assigned to that task. See [My tasks page](#) for more information.

 **Note:** Your agency configures who has access to the **Task management** page. Contact you agency administrator with any questions.

View and edit a task

You can view and edit tasks from the **Task management** page by opening a task. You can also perform other actions depending on the type of task you open.

To edit a task

1. From the **Task management** page, find and open the task you want to edit.
2. Select available menu option as necessary. For example, you may have the option to assign a task by selecting the **Assign** button, if available for that task.

3. Make any desired changes to the task's fields and select **Submit**.

Schedule a new inspection, meeting, or activity

You can schedule inspections, meetings, and activities from the **Task management** page.

To create a new inspection, meeting, or activity

1. From the **Task management** page, hover over the **New** menu button and select one of the following options:
 - Inspection
 - Meeting
 - Activity
2. Follow the steps for creating the task option you selected in the step 1:
 - To create a new inspection, see [Schedule an inspection](#).
 - To create a new meeting, see [Schedule a meeting](#).
 - To create a new activity, see [Create an activity](#).

Process tasks

You can perform actions on a task on the main **Task management** page.

 **Note:** The actions you can perform depend on the task type.

To perform an action on a task

1. Find the task in the task list.
2. In the **Action** column, select the **Action** menu next to the task and select the action you want to perform.

Task Type	Available Actions
Inspection	Reschedule Inspection Result Inspection Cancel Inspection Delete
Workflow Task	Assign Claim Release
Document Review	Assign

Task Type	Available Actions
	Download Preview Review View Doc Info
Activity	Delete
Meeting	Reject

3. Follow the instructions on the screen to complete the action.

View information across agencies

A multi-agency environment allows you to view information across agencies. You can use the following features when working across agencies:

Cross-agency task dashboard

The task dashboard supports multiple agency environments and enables super agency users to view tasks that originate from the various child agencies with which they work.

You 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 whomever is logged into Civic Platform at that time. This enables you to easily identify and navigate to the agencies where you have tasks to perform. This feature requires no configuration.

Cross-agency related records

Civic Platform allows you to view related records across multiple agencies in both list view and tree view.

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 you receive error messages when attempting to open cross-agency records, contact your agency administrator.

To search for records across multiple agencies

1. From the launchpad, open the **Records** page
2. Select **Search**.
3. From the **Menu > Edit View** page, add the **Agency** field, **Record type** field and/or the **Status type** field to your records search page. See for more information on editing the search view.
4. Select the agency you want to search within. You can select multiple agencies by pressing the **Ctrl** key while making your selections.



Note: If you do not make a selection, Civic Platform searches across all agencies in your multi-agency environment.

5. Select the record type you want to search within. The record type menu will display all record types for all agencies a delegate user has access to.
6. Select the status type you want to search for.
7. Enter any additional search criteria and select **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 configured by your agency, 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).

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 when configured by your agency.

Cross-agency inspection search

Civic Platform allows you to search for inspections across multiple agencies. You'll need to add the **Agency** field to your **Inspections Search** page to enable this functionality. See [Cross-agency record search](#) for more information.

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 and is not available in single-agency environments.

Accounting

Civic Platform accounting tools help you to better serve your citizens. These tools allow you 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 [Begin, continue, and end a cashier session](#).

See [Troubleshooting payments and voids](#) to help resolve any problems or answer questions.

Assess fees

Many agencies assess fees to process an application. For example, your agency might charge a minimum inspection fee of \$25.00 for residential applications. Civic Platform determines fees 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 [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. Find and open the desired record.
2. Select the **Fee** tab.
3. From the **Fee calc. factor** field, select the desired fee calculation factor. You can select either a contractor or calculator job value.



Notes:

- Job value only affects fee items which are calculated using a job value. Otherwise, the fee items are not affected.
- 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 [Valuation calculator](#).
- If the **Fee calc. factor** field does not display, Civic Platform calculates fee items with the default job value (contractor).

4. Select **Add**.

5. From the **Fee schedule** and **Version** lists, select the fee schedule and the version you want to use.
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 in 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 select **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 select **Submit**, and it displays the end result as 15.

- Enter the quantity for each fee item individually in the fee item list.
7. Enter additional information as needed in the **Notes** field for each fee item or the **Group note** field for each fee group.



Note: Civic Platform copies the group note into the Note field for each of the fee items in the group.

8. Select **Submit**.



Notes:

- 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.
- If needed, use **Undo** to clear the form and roll the fee list back to its previous status.

To edit fee items

1. Find and open the desired record.
2. Select the **Fee** tab.
3. In the **Fee item** column, select the desired fee item.
4. Update the **Quantity** field and select **Submit**.

To delete fee items

1. Find and open the desired record.
2. Select the **Fee** tab.
3. Select the check box(es) next to the fee item(s) to be deleted.
4. Select **Delete**.

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 predefined unit cost. The job value for an individual application is the sum of all valuations for that application.



Note: Occupancies are predefined 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 predefined 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.

Add 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.



Examples:

- 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.
- 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. From the **Record** page, find and open the application on which you want to assess fees.
2. Select the **Valuation calc** tab.

3. Select **Add**.
4. Complete the fields with data as available. See [Valuation calculator fields](#) for field descriptions.
5. Select **Submit**.

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 the invoice.

Generate invoices

You can generate an invoice from the record page, or you can also generate an invoice from the Payment Processing page. When you generate invoices from the Payment Processing page, 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 record from which you want to generate the invoice.
2. Select the **Fees** tab.
3. Select the fee(s) you are invoicing.
4. Select **Invoice**.
5. To view the invoice, select 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. Open the **Payment processing** page.
2. Select the **Invoices** tab.
3. Use the **Search** icon  next to the **Record ID** or **State License #** to search for the items that you want to invoice.

4. Continue searching for additional **Record IDs** or **State License #s** as required until all items that you want to invoice display.
5. Select each item that you want to invoice then select **Invoice**.



Note: You cannot create an invoice for a previously invoiced item. To separate the items from invoiced items, sort the displayed records by Status (select 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.

Print invoices

You can view or print invoices individually or as a group (batch).

If the batch processing function is enabled for your agency, you can batch process groups of invoices using the Invoice batch page. From this page, you can collect all invoices for a given date range into a batch and print each invoice to mail to the responsible party.

Create an invoice batch

You can group invoices together to create a batch. For example, you can create a batch for all invoices associated with a given project.



You can only include an invoice in one batch at a time. If you include the invoice in a new batch, Civic Platform automatically removes it from any previous batch.

To create a batch

1. From the **Invoices** page, select the check box next to each invoice you want in the batch.
2. Select **Create batch**.



Civic Platform creates the new batch and auto assigns a batch number.

Add invoices to a batch

You can add invoices to an existing batch.

To add invoices to a batch

1. From the **Invoices** page, select the check box next to each invoice you want to add to the batch.



You can use **Search** or **My Filters** to find invoices to add.

2. Select **Add invoices to batch**.
3. Enter the batch number and select **Submit**.

Remove invoices from a batch

You can remove invoices from a batch. For example, a batch previously included invoices for the last two weeks, but now you only want to view invoices for the last ten days.

To remove invoices from a batch

1. From the **Invoices** page, select the check box next to each invoice you want to remove from the batch.
2. Select **Remove invoices from batch**.
3. Select **OK**.

Print 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 page.
2. Select the invoice you want to print.
3. Select **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.



The selected invoice number auto-populates in the **Invoice** field. Enter a different number if you want to print a different invoice.

5. Select **Submit**.
6. Select **Print**.

To print an invoice batch

1. Find the record you want to work with, then navigate to the Invoice page.
2. Select an invoice belonging to the batch you want to print.
3. Select **Reports**, then choose **Batch invoice report** from the drop-down list



If you do not select an invoice that belongs to a batch, Civic Platform displays the error message “Please enter an existing batch number” when you select the **Report** button.

4. Enter the batch number you want to print in the **ClientNum** field.
5. Select **Submit**.
6. Select **Print** to print the report.

Void 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 page.



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.

Void invoiced fees from a record

Voiding an invoiced fee from a record allows you resolve minor billing errors.

To void an invoiced fee

1. Find and open the desired record.
2. Select the **Fee** tab.
3. Select the invoiced fee(s) that you want to void



Note: Invoiced fees have an invoice number and an **Invoiced** status.

4. Select **Void**.
5. From the **Reason** list, select the appropriate reason.
6. (Optional) In the **Comments** field, enter explanatory comments.

7. Select **Submit**.
8. Select the voided fee(s). Voided fees have a status of **Voided** in the **Status** column.
9. Select **Invoice** to credit the fee amount.

Void invoiced fees from the payment processing page

When you void invoiced fees from the Payment processing page, you can void fees for a single record or for multiple records simultaneously.

To void invoiced fees from the Payment processing page

1. From the **Payment processing** page, select the **Invoices** tab.
2. Use the search fields at the top of the page to locate the invoiced fee items that you want to void. Example: to find a fee on invoice 1001, type **1001** in the **Invoice number** field, and then click the search icon.

Continue searching as needed until all items that you want to void display in the list.



Note: Civic Platform updates the total fee amount as you add items to the list.

3. Select each item you want to void.
4. Select **Void**.
5. From the **Reason** list, select the appropriate reason.
6. (Optional) In the **Comments** field, enter explanatory comments.
7. Select **Submit**.
8. To view the transaction details, select the **History** tab and select the desired link in the **Transaction ID** column.

Void invoiced fees from the point of sale page

You can void invoiced fees on a record from the Point of sale page.

To void invoiced fee items from the Point of sale page

1. From the **Point of sale** page, open the desired transaction.
2. Select the **Fee items** tab.
3. Select the check box next to the fee item(s) you want to void.
4. Select **Void**.

5. From the **Reason** list, select the appropriate reason.
6. (Optional) In the **Comments** field, enter explanatory comments.
7. Select **Submit**.

Payments

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 [Begin, continue, and end a cashier session](#).

To work with payments, see:

- [Receive a payment for a record](#)
- [Review failed payments](#)
- [Transfer funds from one record to another](#)
- [Receipts](#)
- [Void a payment](#)
- [View the payment history for a record](#)
- [Process record payments using a barcode scanner](#)
- [Process payments for multiple records](#)
- [Allocate payments](#)

Receive a payment for a record

You can work from both the **Payment** tab in a record or the **Payment processing** page 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 select the **New session** button to open a session or continue a previous session by selecting the red X on the top right



corner to close the pop-up window.

Receive a payment on the Record page

1. On the **Record** page, find and open the desired record.
2. Select the **Payment** tab.
3. Select **Pay**.
4. From the **Payment method** list, select a payment method.
5. Complete the required fields and others as needed. See [Common payment details](#), [Cash payment details](#), [Credit card payment details](#), and/or [Check payment details](#) for field definitions.
6. If there are multiple payment methods or multiple payees for the payment, select **Pay more**, and repeat the previous two steps.
7. Select **Save**.



Important: 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 [Receive a payment for a record](#)).

Receive a payment on the Payment processing page

1. On the **Payment processing** page, select the **Payment** tab and find the desired record.



Note: The **Payment processing** page ignores the records that have negative outstanding total of its fee items.

2. In the **Payment** list, select the record to which you want to apply a payment and select **Pay**.
3. From the **Payment method** list, select a payment method.
4. 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.



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.

5. If you have multiple payment methods or multiple payees for the payment, select **Save** to save the payment details you just entered, and then select **Add** and repeat the previous two steps.

6. Select **Pay**.



Note: If your attempt to process the payment fails, see [Receive a payment for a record](#) 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 [Receive a payment for a record](#).

Review 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.

Transfer 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. Find and open the desired record, and select the **Payments** tab.
2. Select **Fund transfer**.
3. Enter search criteria as needed to locate the record that you want.
4. Select **Submit**.
5. Select the application from which you want to transfer the funds and select **Select**.
6. Complete the required fields and others as needed:

Field name	Description
Transfer amount	Enter the amount you want to transfer.
Method	Currently there is only one transfer method to choose from: Fund Transfer. Civic Platform selects this value by default.
Comment	Enter comments or notes about the transfer.

7. Select **Submit**.



Note: Civic Platform generates a fund transfer transaction and receipt for each application involved in the transfer.

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.

Generate 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. Find and open the desired building record.
2. Select the **Payments** tab.
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. Select **Generate receipt**.

Civic Platform generates a receipt of payment and a receipt summary, then displays each in a separate window.

5. To view or print the receipt, select the link to the receipt number.



Note: You can use your browser's print command to print the receipt.

View a receipt on the payment processing page

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 on the Payment processing page. However, you can also return to the Payment processing page 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

1. On the **Payment processing** page, select the **History** tab.
2. Find and open the desired transaction.
3. Select the desired record ID from the transaction list.
4. Scroll to the **Payment** tab.
5. From the transactions listed on this page, select the desired **Receipt #**.

View a transaction receipt summary from the Payment processing page

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 on the Payment processing page. However, if your administrator has configured a transaction report, you can return to the

Payment processing page later to view and print a receipt summary for a particular transaction.

To view a receipt summary for a group of transactions

1. On the **Payment processing** page, select the **History** tab.
2. Find and select the desired **Transaction ID**.
3. To print a transaction receipt that lists all items in this transaction group, select **Print receipt**.
4. To print a copy of the receipt summary, select **Print receipt**.

Void 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 page. Voiding from the **Payment processing** page allows you to void payments for both a single record and multiple records.

Void a payment from the application

1. Find and open the desired building record.
2. Select the **Payments** tab.
3. Select each payment transaction that you want to void.
4. Select **Void**.
5. From the **Reason** list menu, select a reason. If desired, enter comments.
6. Select **Submit**.

Void a payment from the Payment processing page

When you void a payment from the Payment processing page, you can void payments for a single record or for multiple records simultaneously.

To void a payment from the Payment processing page

1. Find the desired building record.
2. On the **Payment processing** page, select the **Void** tab.
3. Find and select the items that you want to void.



Note: The **Total payments** amount updates as you add items to the list.

4. Select **Void**.
5. From the **Reason** dropdown list, select a reason. If desired, enter comments.
6. Select **Submit**.
7. To view the transaction details, select the **History** tab and select the desired **Transaction ID**. Drill down to view additional details, as desired.

View 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. Find and open the desired building record.
2. Select the **Payment history** tab.

Process 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.

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 [Receive a payment for a record](#).

To process payments with the barcode scanner

1. On the **Payment processing** page, select the **Payment** tab.
2. Select one of these fields: **Record ID**, **State license #**, or **Invoice #**.



Note: To use the barcode scanning functionality, you must connect an Intermec SR30 Handheld scanner to your system.

3. Select **Search**.
4. Select the record from the search results.
5. Scan the invoice number using the barcode device.
6. Select **Pay**.

Process 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](#) for more information.
- 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 [Begin, continue, and end a cashier session](#) for more information.
- 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 page automatically allocates the payment according to the instructions you provide. See [Process payments for multiple records](#) for more information.

Search 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 desired building record.
2. On the **Payment processing** page, select the **Search** button.
3. Enter the desired record ID or state license # and select the **Submit** button.
4. To add more fee items to the payment session, select **Add fees** and complete the search again with

a different record ID or state license #.

5. 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 select **Delete**.

Add 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 desired building record.
2. On the **Payment processing** page, select the **Search** button.
3. Complete the **Record ID** or **State license #** field and select the **Submit** button.
4. Do one of the following:
 - Select **Add POS item**.
 - Select the **Payment** tab, then select the **Add POS item** button.
5. Select the **POS type**, **Category**, **Version**, and **Fee item** from the dropdown lists.
6. Enter a value in the **Quantity**, **Unit price**, and **Notes** fields.
7. To add more than one POS item, select **Add** on the POS page.
8. Select **Submit**.

Add records for renewal

When a record expires, you can renew the record and pay for the newly generated fee using the Payment processing page.

To add records for renewal

1. On the **Payment processing** page, select **Add renewals**.
2. Enter the desired record ID or state license # and select the **Search** icon.
3. Select the desired record and select **Select**.

Process 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

1. Find an open the record with the fees the individual wants to make payment on, and add POS items if needed.

For instructions on adding POS items to a transaction, see [Add point of sale items to the payment list](#).

2. On the **Payment processing** page, select the desired option from the **Payment method** dropdown menu.



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. Enter the required information, and select **Save**.

3. Enter the payment details for the selected payment method.

If you are entering a cash payment, see [Payment details for a set](#) 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 [Payment details for a set](#) 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 [Payment details for a set](#) and [Check payment details](#) for field definitions.

4. Select **Save** to save the payment details for the selected payment method.
5. To add another payment method, select **Add** on the **Payment processing** page, and repeat steps 2 through 4 above.



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, select **Add**, then select the payment method and enter the amount paid for that method type.
7. To remove a payment line, mark the check box next to the line then select **Delete**.

8. Select **Pay**.



Note: If there is overpayment or underpayment, Civic Platform automatically allocates the payment. See [Process payments for multiple records](#).

View 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. On the **Payment processing** page, select the **History** tab.
2. To search for a transaction ID, enter the transaction ID or the date of the transaction and select **Submit**.

To view all transactions within a certain time period, enter the date range for the transactions and select **Submit**.

To view the details of a transaction, select the **Transaction ID** number.

3. To print a receipt for the transaction, navigate to the transaction details, then select **Print receipt**.

Allocate payments

In case of over-payments or underpayments for the selected fee items, the **Record** page or the **Payment processing** page give you different solutions to allocate the payment. The Payment processing page always automatically allocates a payment, while the **Record** page allows you to either allocate a payment manually or automatically.



Note: The mechanisms for automatically allocating underpayments are different in the Record page and the Payment processing page. Please read the applicable topics in this section.

Automatic allocation of payments on the Record page

Depending on the configuration by your agency administrator, automatic allocation of payments might or might not work on the Record page.

If you pay more than the total amount, then after you select **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 select **Save** on the **Payment** tab from the **Record** page, the fee allocation screen displays. You can then select **Full pay** to determine the status of automatic allocation for your agency.

When you select **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 are the automatic allocation rules that apply:

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.
5. 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 on the Payment processing page

Civic Platform only supports automatic payment allocation function on the Payment processing page in case of overpayments or underpayments. After you select **Pay**, the payment is complete with the paid amount automatically allocated.

If a payment on the Payment processing page 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 are the automatic allocation rules that apply:

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:
 1. Civic Platform pays negative fee items in the record in full with the topmost priority;
 2. 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.
 3. 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.
 4. 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 allocate a payment on the Record page

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 [Receive a payment for a record](#).
2. Locate any fees with an outstanding balance.



Note: Fees with an outstanding balance show a balance greater than zero on the **O/S** column.

3. Do one of the following:
 - To allocate a payment that covers the full balance of an outstanding fee, mark the check box next to the fee and select **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 the **Tab** key.



Important: Do not press the **Enter** key to recalculate the total amount. Doing so completes



the transaction.

5. Select **Submit**.

To allocate a payment separate from the time of receipt

1. Find and open the desired building record.
2. Select the **Payments** tab.
3. Select the transaction with an unallocated balance.
4. Locate any fees with an outstanding balance.



Note: Fees with an outstanding balance show a balance greater than zero on the **O/S** column.

5. Do one of the following:
 - To allocate a payment that covers the full balance of an outstanding fee, mark the check box next to the fee and select **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.
6. To calculate the total allocation, press the **Tab** key.



Important: Do not press the **Enter** key to recalculate the total amount. Doing so completes the transaction.

7. Select **Submit**.

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 page.** This method allows you to initiate a full refund of all payments for one or more applications simultaneously.

Refund 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 [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. Find and open the record requiring the refund.
2. Select the **Payments** tab.
3. Select **Refund**.



Note: 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 select **Full refund**.
or
 - To withdraw part of a payment, enter the partial payment amount in the **Amount** field next to the fee.



Note: Civic Platform increases the total refund amount.

5. To recalculate the total refund, press the **TAB** key.



Note: Do not press **ENTER** to recalculate! Pressing **ENTER** completes the transaction rather than recalculate it.

6. Select **Submit**.
7. Complete the fields with available information (see [Refund details](#) for field descriptions).
8. Select **Submit**.

Civic Platform generates a receipt.

9. To view or print the receipt, select the link to the receipt number. Use your browser's print function to print the receipt.

Refund a payment from the payment processing page

Use the **Refund** tab on the Payment Processing page to refund multiple fee payments for one or more applications simultaneously.

To refund a payment through the Payment Processing Portlet

1. From the **Payment processing** page, select the **Refund** tab.

The screenshot shows the 'Payment Processing' window. At the top, there is a menu bar with buttons: 'Menu', 'Add Fees', 'Add POS Item', 'Refund', 'Delete', and 'Help'. Below this is a tabbed interface with 'Payment', 'Refund', 'Void', 'Invoices', and 'History'. The 'Refund' tab is currently selected. Below the tabs, there are five search fields: 'Record ID', 'State License #', 'Receipt Number', 'Invoice Number', and 'Transaction ID'. Each field has a magnifying glass icon to its right, indicating a search function.

2. Use the **Search** icon  associated with criteria to locate the items you want to refund. Repeat the search until all refundable items display.



Note: As Civic Platform displays a list of items that match your search criteria, the **Available refund amount** updates automatically as you add items to the list.

3. Select each item that you want to refund.
4. Complete the fields in the **Refund payments** section with available data (see [Refund details](#) for field descriptions).
5. Select **Submit**.
6. Select **Refund**.



Note: You can view the transaction details by selecting the **History** tab and then the Transaction ID. You can navigate through the transaction to view additional details. You can also print a receipt.

Refund a payment from the point of sale page

Use the Refund button from the Point of Sale page 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 page

1. From the **Point of sale** page, find and open the record.
2. Select the **Payments** tab.
3. Select **Refund**.
4. Do one of the following:
 - To withdraw the full payment, mark the check box next to the invoice and select **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! Pressing **ENTER** completes the transaction rather than recalculate it.

6. Select **Submit**.
7. Complete the fields with available information (see [Refund details](#) for field descriptions).
8. Select **Submit**.



Note: Civic Platform generates a receipt.

9. To view or print the receipt, select the link to the receipt number. You can use your browser's print function to print the receipt.

Void 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. Find and open the record you want to void the refund.
2. Select the **Payments** tab.
3. Select each refund transaction that you want to void.
4. Select **Void**.



Note: Civic Platform updates the transaction status to **Voided**.

Trust accounts

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.

For information on using trust accounts, see:

- [Create, close, and view trust accounts](#)
- [Trust account transactions](#)
- [View and print trust account reports](#)

Create, close, and view trust accounts

Create 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. From the **Trust account** page, select **New**.
2. Complete the required fields and others as needed. See [Trust account form fields](#) for field descriptions.
3. Select **Submit**.
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).
 - If you are on the **Associated address** tab, select **Associate address**.
 - If you are on the **Associated parcel** tab, select **Associate parcel**, **Associate licensed professional** or **Associate contact**, depending on what you want to associate.
5. Find and select the item(s) that you want to associate to the trust account.
6. Select **Select**.

Close 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. On the **Trust account** page, select the check box next to the trust account that you want to close.
2. From the **Menu** button, select **Close**.

View 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 page.

To view associated records

1. From the **Trust account** page, find and open the trust account record.
2. Select one of the following tabs:
 - Associated address
 - Associated parcel
 - Associated people

Assign 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. From the **Trust account** page, find and open the trust account record.
2. Select the **Public user permission** tab.
3. Select **Look up**.
4. Enter desired search criteria.
5. Select **Submit**.
6. Do one of the following:
 - Select a public user and select **Approve**.
 - Select a public user and select **Reject**. This action prohibits trust account access to this public user.

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.

Deposit 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. From the **Trust account** page, find and open the trust account record.
2. From the **Account detail** tab, select **Menu > Deposit**.
3. Enter the amount of money you want to deposit in the **Amount** field and complete other fields as needed.
4. Select **Submit**.

Transfer 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. From the **Trust account** page, find and open the trust account record.
2. From the **Account detail** tab, select **Menu > Transfer**.
3. Enter the amount of money you want to transfer in the **Amount** field.
4. Select the destination trust account from the **Target account ID** list.
5. Select **Submit**.

Withdraw 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. From the **Trust account** page, find and open the trust account record.
2. From the **Account detail** tab, select **Menu > Withdraw**.
3. Enter the amount of money you want to withdraw in the **Amount** field and complete other fields as needed.
4. Select **Submit**.

Make 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 on the **Record** page, you select **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 record you want to work with.
- 2. Select the **Fee** tab.
- 3. Select the check box next to each fee item with a status of **New**.
- 4. Select **Invoice & pay**.

**Note:** If the trust account includes multiple contacts, licensed professionals, addresses or parcels, Civic Platform displays the trust account selection window.

- 5. Select a trust account to pay for the fee items.
- 6. Do one of the following:
 - To invoice and pay, select **Submit**.
 - or
 - To invoice but not pay, select **Invoice without pay**.

Make an adjustment to a trust account

- 1. From the **Trust account** page, find and open the trust account record.
- 2. From the **Account detail** tab, hover over **Menu** and select **Adjust**.
- 3. Edit the fields as needed.

Field name	Action
Amount	Enter the amount you want to adjust.
Transaction type	Select Credit adjust to add money into the trust account for the entered amount. Select Debit adjust to remove money from the trust account for the entered amount.

4. Select **Submit**.

View and print trust account reports

Civic Platform provides multiple types of reports to help your agency keep track of trust accounts.

View 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. From the **Trust account** page, find and open the trust account record.
2. Select the **Transactions** tab.

Print 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. Open the **Trust account** page.
2. Do one of the following
 - Select **Menu > Negative balance report** to access the **Negative balance** report.
 - Access transactions reports:
 1. Find and open the trust account.
 2. Select the **Transactions** tab.
 3. Select the check box next to the transactions you want to include.
 4. Select **Print report**.
3. Select the **Print** button in your browser toolbar or select **Print** from the browser menu.

Begin, continue, and end a cashier session

A cashier session can record all transactions completed by a cashier during one business day.



Note: Your agency administrator must configure cashier sessions before they are available for you to use.

Search for a cashier session

To search for a cashier session

1. From the **Cashier session** page, select **Search**.
2. Enter search criteria as needed (see [Cashier session form fields](#) for field descriptions).
3. Select **Submit**.



Tip: To see all cashier sessions, select **Submit** without entering any search criteria.

Begin a cashier session

Before you can accept payments or handle transactions, you must begin a new cashier session. 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. From the **Cashier session** page, select **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.

Continue a suspended cashier session

If your cashier session remains inactive for a period of time, Civic Platform may suspend your session. Before you can continue with additional transactions, you must reactivate the cashier session.

To continue a suspended cashier session.

1. From the **Cashier session** page, select **Continue session**.

End and print a cashier session

At the end of your shift, remember to end your cashier session.



Note: Before you end the cashier session, you can enter a deposit slip number and select a deposit date for the monies collected during the session.

To end a cashier session

1. (Optional) On the **Cashier session** page, complete the **Deposit slip #** and **Deposit date** fields.
2. Select **End session**.
3. Select **OK**.



Note: Civic Platform ends the session and displays the **Cashier summary** page.

4. (Optional) Select **Print** to print the page.

Point of sale transactions

Your agency might have a fee that it does not need to associate with a record.



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.

Create a point of sale transaction

To create a point of sale transaction

1. From the **Point of sale** page, select **New**.
2. Complete the fields and enter the quantity of the fee item.
3. (Optional) To add fee items:
 1. Select **Add**.
 2. Complete the fields and enter the quantity of the fee item.
4. Select **Submit**.

Receive 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 [Begin, continue, and end a cashier session](#).

To receive a payment for a point of sale transaction

1. From the **Point of Sale** page, find and open the desired point of sale transaction.
2. Select the **Fee items** tab.
3. Select the point of sale transaction you want to pay.
4. Select **Pay**.
5. Complete the form with available data. See [Accounting page details](#) for field descriptions.
6. If you are processing additional payments, select **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.

7. After you receive all payments, select **Submit**.
8. Do one of the following:
 - To allocate a payment, see [Payments](#).
 - If you do not want to allocate a payment at this time, select **Cancel**.
9. Do one of the following:
 - If prompted to generate a receipt of payment, mark the check box next to the payment you want and select **Submit**.
 - If you do not want to generate a receipt of payment, select **Cancel**.

View point of sale transaction detail

You might need to view the status, the payment method, or the name of the cashier who completed a point of sale transaction.

To view a point of sale transaction

1. On the **Point of Sale** page, find and open the desired point of sale transaction.
2. Select the **Transaction detail** tab.

Accept and allocate set payments

You can allocate and apply payments to a set. You can accept full or partial payment towards the total outstanding balance for all records 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.

To accept and allocate set payments

1. Open the **Sets** page.
2. In the **Set ID** column, select the link for the desired set.



Tip: Select **Search** in the toolbar to search for a set by Set ID, Set Name, or other parameters.

3. Select the **Payment** tab.



Note: 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

4. Select **Pay**.



Note: If you cannot process negative fee items, contact your agency administrator to activate the **ALLOW_NEGATIVE_FEE_TRANSFER_AS_CREDIT** standard choice.

5. Complete the required fields and others as needed. See [Payment details for a set](#) for field definitions.



Note: If the payment method is Credit Card, you can use a magnetic card reader to read the credit card information automatically into the corresponding fields.

6. Select **Save**.
7. Do one of the following:
 - If you are receiving a payment for the entire balance, select **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. Select **Save**.

**Notes:**

- Civic Platform generates a receipt that summarizes the payment. The 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 a receipt printer, Civic Platform prints a receipt and displays the itemized receipt in a pop-up window.
- If the payment method was 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 was 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:

1. Assess a fee.
2. Invoice or charge the customer for the fee.
3. Receive payments.
4. Apply payments to the appropriate invoices/accounts.

This topic provides information to help you troubleshoot and correct common issues that may occur during this process.

Assessed fee, but no invoice

When you assess a fee, Civic Platform schedules the fee to be charged to the customer. If a problem occurs *before* you invoice (charge) a fee to the customer, you can delete the assessed fee and try assessing it again. For information on how to delete an assessed fee, see [Assess fees](#).

Assessed & invoiced fee, but no payment

When you assess and invoice a fee, it means that you have charged the fee to the customer and you require payment. If the customer has not yet paid this invoice and you discover a problem, you can void the invoice and create a new one. You can also void the assessed fee, replace it with a corrected one, and generate a new invoice. For instructions, see [Void an invoiced fee](#).

Another approach is to apply a negative fee item. Your agency administrator must enable this feature. Civic Platform denotes a negative fee item with parentheses around the fee amount. This feature is often used when transferring a payment from one record to another. For more information on transferring a payment, see [Transfer funds from one record to another](#).

Assessed & invoiced fee, payment received, but not applied

A customer can make a payment to the agency at any time. When payment is received, Civic Platform applies it to the appropriate invoice(s) and/or application(s). If payment has been received but not applied, you have several options:

- You can apply the payment manually to the invoice.
- 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 [Allocate payments](#). For instructions on how to void a payment, see [Void a payment](#). For instructions on how to void an invoice and assessment, see [Void 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 payment is due. For instructions on how to refund a payment, see [Refunds](#).

If you decide 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 the original payment back 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

If a fee has been	You can
	• 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

You can handle voids and unapplied fees in Civic Platform. This allows users to view the correct amount for the fees they owe in Citizen Access.

To void or credit a fee item

- 1. Find and open the desired record.
- 2. Select the **Payments** tab.
- 3. Void the payment transaction.

**Note:** The entire payment is voided and the total balance is the previously invoiced amount of all fee items.

- 4. Select the **Fee** tab.
- 5. Void or credit the appropriate fee item.
- 6. On the **Payment** tab, verify that the **Total Balance** displays the relevant fee item.

7. Pay the balance.

**Note:** Verify that the fees paid balance is the same in both Citizen Access and Civic Platform.

To verify the balances

1. Invoice the new fee item.
2. View the **Payments** tab.

The new balance is for the newly invoiced fee item.
3. In Citizen Access, view the **Fees** tab and verify that the balance due equals the newly invoiced amount.

Accounting page 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 pages you might encounter.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Fee list fields

The following table defines the default fields on the fee list.

Fields	Description
Account Code 1/2/3	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.
Account Fee 1/2/3	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.
Date Assessed	Assessment date of the fee for this application.
Fee	The total amount of the fee in dollars.

Fields	Description
Fee Code	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”
Fee Item	A brief description of the fee item. For example, you can enter the source or purpose for the fee.
Invoice #	A unique number that identifies the invoice on which this fee appears.
Period	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.
Quantity	The quantity entered upon fee assessment.
Status	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.
Subgroup	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.
Unit	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.

Fields	Description
Extra Amount	Used to add extra dollar amounts to the Total Valuation. You can use positive or negative numbers.
Exclude from Regional Modifier	Use to create a valuation occupancy record that excludes the regional modifier to calculate total valuation. Clear this option to enable regional modifier functionality.
Multiplier	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).
Occupancy	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.

Fields	Description
Unit Type	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
Unit	The measurable unit of work required for the occupancy. The unit allows you to calculate the value of the occupancy, or job value.
Unit Amount	The total number of units.
Version	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.

Fields	Description
Alternate ID	An alternate identification number for the invoice.
Balance Due	The unpaid amount on the invoice.
Record ID	The identification number for the record.
Invoice Amount	The total amount due on the invoice.
Invoice Batch Date	The date when you create the invoice.
Invoice Batch Number	The batch number that contains the invoice.
Invoice Comment	Enter any comments associated with the invoice.
Invoice Date	The generation date of the invoice.
Invoice Due Date	The date the fees on the invoice are due.
Invoice Level	The invoice level of importance.
Invoice Number	The invoice identification number.
Invoice Status	The status of the invoice. For example, paid.
Invoice Status Date	The date when the invoice status changed. For example, if a licensed professional made a partial payment.
Print Invoice Number	A number to identify the order that invoices print.
Printed	The date that the batch prints.

Invoice detail fields

The following table defines the default fields on the Invoice Detail form.

Fields	Description
Fee	For each fee item, the amount of the fee multiplied by the quantity.
Fee Item	A description of each fee itemized on the invoice.
Invoice #	A unique number that identifies the invoice.
Invoice Date	The date when the invoice generates.
Period	For each fee item on the invoice, the payment period to which a fee item belongs.
Qty (Quantity)	The assessment quantity for each fee item on the invoice.
Record ID #	The identification number of the application to which the invoice belongs.
Total Fee	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.

Fields	Description
Amount	Enter the total payment amount. By default, the total balance owed populates this field.
Balance	In case of underpayment, this read-only field displays the under-paid amount with the following equation: Balance= Fee Total-Total Tendered . Otherwise, the field displays a zero (0.00).
CC Auth Code	The three digit authorization number located on back of the credit card.
Change	In case of overpayment, this field displays the amount of money due back to the payor. The over-paid amount populates the Change and Unapplied Credit fields with the following equation: $\text{Change} + \text{Unapplied Credit} = \text{Total Tendered} - \text{Fee Total}$ If the payment method is not Cash, both the Change and Unapplied Credit fields display as read-only, with a zero (0.00) in Change, and the total over-paid amount in Unapplied Credit. If the payment method is Cash, both fields are editable.
Comment	Any comments pertaining to the payment.
Fee Total	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.
Payment Method	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.

Fields	Description
Total Tendered	This read-only field displays the total monies received during the payment process on the selected records.
Unapplied Credit	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 Change and Unapplied Credit fields with the following equation: $\text{Change} + \text{Unapplied Credit} = \text{Total Tendered} - \text{Fee Total}$ If the payment method is not Cash, both the Change and Unapplied Credit fields displays as read-only, with a zero (0.00) in Change, and the total over-paid amount in Unapplied Credit. If the payment method is Cash, both fields are editable.

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](#).

Fields	Description
Payor	Enter the name of the payor. You can use the picker next to the field to select a payor from the payor list.
Received	Select the payment delivery method; for example, In Person, Mail, or Fax.
Reference #	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](#).

Fields	Description
Account Number	The credit card account number.
Business Name	Enter the business name of the credit card holder.
Card Holder's Name	If the payment method is Credit, enter the name of the credit card holder exactly as it appears on the credit card.
Card Holder's Email	Enter the email address of the credit card holder.
Card Security	If the payment method is Credit, enter the credit card security code located on the back

Fields	Description
Code	of the credit card.
Card Type	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.
Comment	Enter any comments or notes about this transaction.
City	Enter the city of the credit card holder.
Expiration Date	Enter the credit card expiration date.
Received	Select the payment delivery method; for example, In Person, Mail, or Fax.
State/Province	From the drop-down list, choose the state or province where the card holder resides.
Street Address	Enter the street address of the credit card holder.
Street Address2	Enter the street address of the credit card holder into the Street Address and Street Address2 fields if the address needs two lines.
Telephone	Enter the telephone number of the credit card holder.
Zip	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](#).

Fields	Description
Account Number	The checking account number on the bottom of the check.
Business Name	The business name of the check holder.
Check Processing Type	The check processing type. For example, Account Debit or Electronic Check.
Check Holder's Email	The email address of the check holder.
Check Holder's Name	The name of the check holder.
Check Number	The check number of the check.
Check Type	The check type From the drop-down list. For example, company or personal.
City	Enter the city of the credit card holder
Comment	Any comments or notes about this transaction.

Fields	Description
Driver License	The drivers license number of the check holder.
Phone Number	The phone number of the check holder.
Received	The payment delivery method; for example, In Person, Mail, or Fax
Routing Number	The routing number on the bottom of the check.
SSN/Federal Tax ID	The check holder's social security number for personal checks or the company's federal tax id number for business checks.
State/Province	The state or province where the card holder resides.
Street Address	The street address of the check holder.
Street Address2	The street address of the check holder into the Street Address and Street Address2 fields if the address needs two lines.
Zip	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](#).

Fields	Description
CC Auth. Code	The three digit authorization number located on back of the credit card.
Comments	Any important comments or notes about the refund payment.
Method	The method used to issue the refund payment. For example, Cash, Check, or Credit.
Paid To	The name of the person receiving the refund.
Reason	The reason for the refund.
Reference #	The check number or the number that identifies the other document.
Refund Amount	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.
Refunded	The manner in which the payment was refunded. For example, In Person, Mail, or Fax.
Trust Account	The trust account to return the funds to.

Payment summary fields

The following table defines the default fields on the Payment Summary form.

Fields	Description
Amount	The total amount due of all fee items listed on the invoice.
Amount	The total amount of the payment or the refund transaction.
Amount Not Applied	The total amount of unallocated payments.
Balance	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.
Cashier ID	Your identification name or your identification number. This ID shows up on any fees, invoices, and receipts that you generate.
Date	Today's date. This date shows up on any fees, invoices, and receipts that you generate today.
Date	The date of the transaction.
Full Paid	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.
Invoice #	A unique number that identifies the invoice.
Method	The method of payment such as credit, cash, or check.
Not Applied	The amount of the payment or the refund that Civic Platform has not allocated to an invoiced fee.
Receipt #	If you generate a receipt for a transaction (payment or refund), the receipt number identifies the receipt.
Received	The payment delivery method; for example, In Person, Mail, or Fax.
Status	The current status of the transaction such as paid or voided.
Terminal #	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.
Total Balance	The difference between the total amount of invoiced fees and any payments that Civic Platform has applied toward this application.
Total Invoice Amount	The total amount of fees invoiced to the applicant, billing contact, organization, or other responsible party.
Total Payment	The total amount of payments received from the applicant, billing contact, organization, or other responsible party.
Transactions	The type of transaction such as payment or refund.

Receipt details

The following table defines the default fields on the Receipt detail form.

Fields	Description
Amount Paid	The total amount of the payment or the refund transaction.
Cashier ID	The identification name or the identification number of the individual responsible for the transaction.
Comments	Any comments surrounding the transaction.
Owner Info	The contact responsible for making a payment or receiving a refund.
Payment Date	The date when the transaction occurred.
Payment Method	The method of payment such as credit, cash, or check.
Receipt No	If you generate a receipt for a transaction (payment or refund), the receipt number identifies the receipt.
Ref Number	The check number or number that appears on the document.
Work Description	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.

Fields	Description
Account ID	The account ID number for the trust account.
Balance	The balance of the trust account in dollars
City	The city corresponding to the address on record.
County	The county corresponding to the address on record.
Description	The description of the trust account.
Dir	The type of street, such as "Lane" or "Avenue."
Direction	The street direction. For example, choose N to indicate a north direction, such as North Broadway.
Distance	The distance from another landmark used to locate the address.
First Name	The first name of the individual responsible for the trust account.
Inspection	The prefix for the inspection district within which the address resides.

Fields	Description
District Prefix	
Last Name	The last name of the individual responsible for the trust account.
Ledger Account	The ledger account of the trust account.
Lot	The name, or boundaries, of the lot associated with the application.
Middle Name	The middle name of the individual responsible for the trust account.
Neighborhood	The neighborhood within which the address resides.
Neighborhood Prefix	The prefix for the neighborhood within which the address resides.
Organization Name	The organization name of the contact associated with the trust account.
Overdraft	This defines whether the trust account can use an overdraft option.
Overdraft Limit	The overdraft limit amount, in dollars, for the trust account.
Parcel #	Full or partial parcel number.
People Type	Type of contact associated with the trust account.
Prefix	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.
Range	The range number of the address.
Reference Address ID	The identification for any reference address.
Secondary Road	The road for the secondary address.
Secondary Road Number	The number of the address’s secondary road.
Section	The section of the subdivision in which the address resides.
State	The state corresponding to the address on record
Status	The status of the trust account (open or closed).
Street Name	The street name for the address.
Street # (start/end)	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.
Type	The type of item associated with the property that you are searching for, such as Licensed Professional, Contact, Address or Parcel.

Fields	Description
Unit # (Number)	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.
Unit Type	The type of structure for this address, for example, apartment or condo.
X Coordinate	The latitudinal coordinate for the address.
Y Coordinate	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.

Fields	Description
Amount	The total payment amount.
Bank Name	The name of the bank that issued the credit card or the check.
CC Auth Code	The credit card number.
CC Exp Date	The credit card's expiration date.
CC Holder Name	The name of the credit card holder as it appears on the credit card.
Check Holder's Email	The email address of the check holder.
Check Holder's Name	The name of the check holder.
Check Number	The check number.
Check Type	The check type from the drop-down list. For example, company or personal.
City	The city of the payor.
Comment	Comments to help identify or explain the reason for this payment. If there are any special circumstances for this payment, indicate them here.
Country/Region	The country or region of the payor.
Driver's License	The drivers license number of the payor.
Method	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.
Payor	The name of the payor.
Phone Number	The phone number of the payor.

Fields	Description
Received	The payment delivery method; for example, In Person, Mail, or Fax.
Reference #	If you are receiving a check payment, this is the check number.
State	The state where the payor is located.
Trust Account	The number or code that identifies the terminal where you are accepting payment.
Zip	The zip code of the payor.

Cashier session form fields

The following table defines the default fields on the Cashier Session form.

Fields	Description
Begin Time	Use the From and To fields to enter the date parameters that you want to use for your search.
Deposit Date	Specify a deposit date in this field (Supervisors only). After submittal, you can modify both the Deposit Slip # and the Deposit Date fields.
Deposit Slip #	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.
End Time	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.
First Name	The first name of the cashier that you want to search for.
Last Name	The last name of the cashier that you want to search for.
Session Number	The cashier session number that you want to search for.
Status	Closed Select to search for closed cashier sessions. Enabled Select to search for active cashier sessions.

Activities

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.

Find and create activities

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.

Find activities

You can use the My Tasks page to find activities assigned to you or others.

To find activities

1. From the **My tasks** page, select the **Activities** tab.
2. Select **Search**.
3. Complete the search fields that match the activity for which you are looking.
4. Select **Submit**.

Create an activity

You can create new activities from the **My tasks** page or from individual records.



Note: You can remove activities from the **Activities** tab in **My tasks** or from individual records by selecting the check box next to the activities and selecting **Delete**.

To create a new activity

1. Open one of the following:
 - The **My tasks** page
 - or
 - An individual record
2. Select the **Activities** tab.

3. Select **New**.
4. Complete the following fields with available data.

Field	Description
Description	A description of the activity.
Internal Only*	Indicates whether the record is for internal use only.
Activity Number	The activity number as assigned by Civic Platform.
Start Date*	The beginning date of the activity.
Assigned to Department	The department responsible for addressing the activity.
Due Date	The due date for the activity.
Activity Name*	The name of the activity.
Priority	The priority level for the completion of the activity.
Assigned to Staff - Check Availability	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.
Type	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.
Activity Status	This is the status of the activity.

5. Select **Submit**.

Add and update activities for records

You can associate activities to records.

Add a new activity to a record

Add a new activity when a new action takes place on a record.

To add a new activity to a record

1. Open a record from a record list page.



Note: You can use search to find records for which you are looking.

2. Select the **Activities** tab.

3. Select **New**.
4. Complete the following fields with available data.

Field	Description
Description	A description of the activity.
Internal Only*	Indicates whether the record is for internal use only.
Activity Number	The activity number as assigned by Civic Platform.
Start Date*	The beginning date of the activity.
Assigned to Department	The department responsible for addressing the activity.
Due Date	The due date for the activity.
Activity Name*	The name of the activity.
Priority	The priority level for the completion of the activity.
Assigned to Staff - Check Availability	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.
Type	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.
Activity Status	This is the status of the activity.

5. Select **Submit**.

Update an activity

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 modify an activity for a record

1. Open a record from a record list page.



Note: You can use search to find records for which you are looking.

2. Select the **Activities** tab.

3. In the **Number** column, select the link for the activity you want to update.
4. Make changes to any of the following fields:

Field	Description
Description	A description of the activity.
Internal Only*	Indicates whether the record is for internal use only.
Activity Number	The activity number as assigned by Civic Platform.
Start Date*	The beginning date of the activity.
Assigned to Department	The department responsible for addressing the activity.
Due Date	The due date for the activity.
Activity Name*	The name of the activity.
Priority	The priority level for the completion of the activity.
Assigned to Staff - Check Availability	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.
Type	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.
Activity Status	This is the status of the activity.

5. Select **Submit**.

View the activity summary

The **Activity summary** tab lists both the activities associated with an application or a service request and any completed ad hoc and workflow tasks. You can select the **Name** link for an activity/task record in this tab to view details.

To view the activity summary of a record

1. Open a record from a record list page.



Note: You can use search to find records for which you are looking.

2. Select the **Activity summary** tab.
3. Select the link for the activity or tasks you want to view.

Create, update, or delete activities for people and property

You can associate activity types with people and property pages. This association enables agencies to record simple actions related to people and property that do not require an application or service request.

**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.

The people and property pages are:

- Addresses
- Parcels
- Owners
- Contacts
- Licensed professionals

**Note:** The process for creating, updating, and deleting activities to/from the people and property pages is the same. This help page describes that process for all of these types of pages.

**Note:** From the Parcels page, you may need to maintain the activities assigned to a split or merged parcel by copying or moving activities. Select [Copy or move an activity for a parcel](#) for more information.

Create an activity

1. Open a people or property page and open the record to which to create an activity.
2. Select the **Activity** tab.
3. Select **New**.
4. Complete the activity fields.

Field	Action
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. Select **Submit** to save your changes.

Update an activity

1. Open a people or property page and open the record to which to update an activity.
2. Select the **Activity** tab.
3. Select the activity you want to update.
4. Modify the fields as needed.
5. Select **Submit**.

Delete an activity

1. Open a people or property page and open the record from which to delete an activity.
2. Select the **Activity** tab.
3. Select the activity you want to delete.
4. Select **Delete**.

Copy or move an activity for a parcel

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** page, open the parcel from which you want to copy or move an activity.
2. Select the **Activity** tab.
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 select **Copy**.
 2. Select the destination parcel(s).
 3. Select **Submit**.
 - Move the associated activity between two genealogically related parcels:

1. Select the activity that you want to move and select **Move**.
2. Select the destination parcel(s).
3. Select **Submit**.

Ad hoc reports

The ad hoc report writer gives you 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.



Note: To use the ad hoc reports feature in Civic Platform, your agency must install the tool on your reports server. Some additional configurations are also necessary after the installation. Please contact your agency administrator if you have questions.

Ad hoc reports configuration requirements

To use the ad hoc reports feature in Civic Platform, your agency must install the tool on its reports server. Some additional configurations are also necessary after the installation.



Note: For more information about installing and configuring the ad hoc reports feature, contact your agency administrator or help desk.

Open 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 open the ad hoc report writer

1. Select the Ad Hoc Reports link in the main links section of your Civic Platform console.

The Ad 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. Select **Open ad hoc report writer**.

Existing reports

You can run, delete, edit, and export existing reports.

Run an existing report

You can run an existing report from the Report List or from the Report Designer.

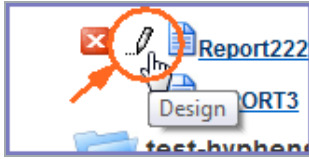
To run an existing Report from the Report List

1. Open the ad hoc report writer portlet (see [Open the ad hoc report writer](#)) and locate the report you want to run.
2. Select 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 [Open 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. Select the **Preview** button on any of the tabs or click the **Preview** tab.

The report runs and its contents display.

Delete 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 [Open 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. Select .
4. The ad hoc report writer prompts you to confirm the deletion.
5. Select **OK**.

The ad hoc report writer removes the report.

Edit 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 [Open 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. Select .
 - 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. Select **Save** to save your changes.

Export a report

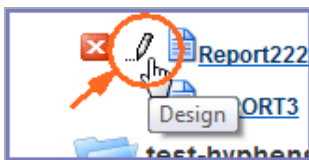
You can export ad hoc reports to several different output types, where you can further manipulate the data as needed.



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 [Open 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. Select 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.

Create new ad hoc reports

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](#).

Related Information

- [Izenda Report Design Guide](#)

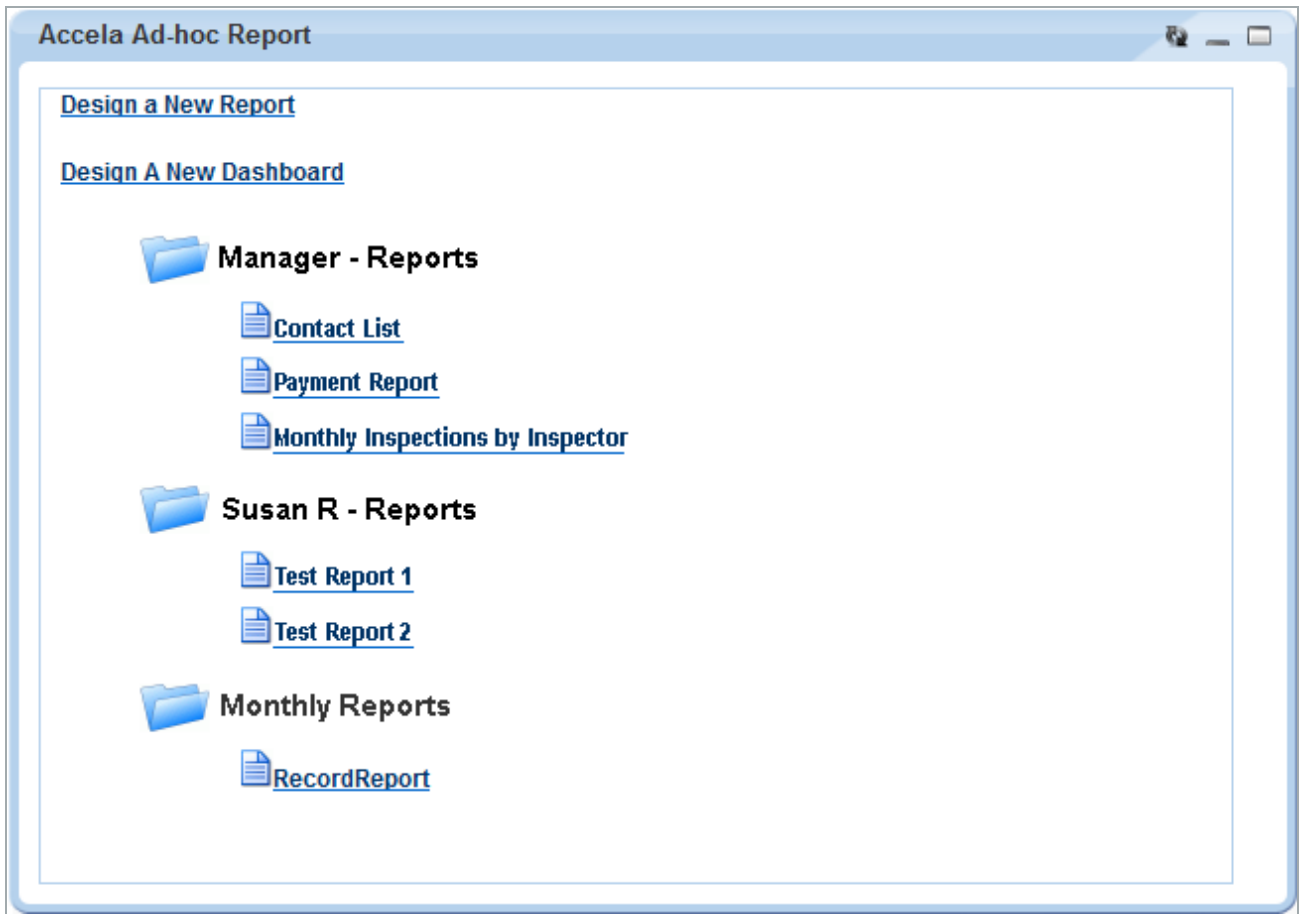
Create a report

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 [Open the ad hoc report writer](#)).

The Ad hoc Report portlet opens and displays the Report List.



2. Select **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
☐	V_ADDRESS	Address view	0	
☐	V_GUIDESHEET	Guidesheet view	0	
☐	V_INSPECTION	Inspection view	0	
☐	V_OWNER	Owner view	0	
☐	V_PARCEL	Parcel view	0	
☐	V_PAYMENT	Payment view	0	
☐	V_RECORD	Record view	0	
☐	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.



Note: Select [List of characters not accepted in Ad hoc reporting](#) to view the list of characters that are not supported in report fields.

Accela Ad hoc Report

Data Source (Views and Tables)

☐ Report List

☐ Allow Nulls
 ☒ Distinct

	Name	Description	Number of Selected Templ...	Templates
☐	V_ADDRESS	Address view	0	
☐	V_CONTACT	Contact view	0	
☐	V_GUIDESHEET	Guidesheet view	0	
☐	V_INSPECTION	Inspection view	0	
☐	V_OWNER	Owner view	0	
☐	V_PARCEL	Parcel view	0	
☒	V_PAYMENT	Payment view	0	
☐	V_RECORD	Record view	0	
☒	V_REF_PROFESSIONAL	Ref Professional view	3	

DB View Relationships

Please create the relationships between the selected DB views to show how the columns in one DB view are linked to columns in another DB view.

V_PAYMENT

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, select the **Template** button .
- for the related DB_View and follow the process described in [Add 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.



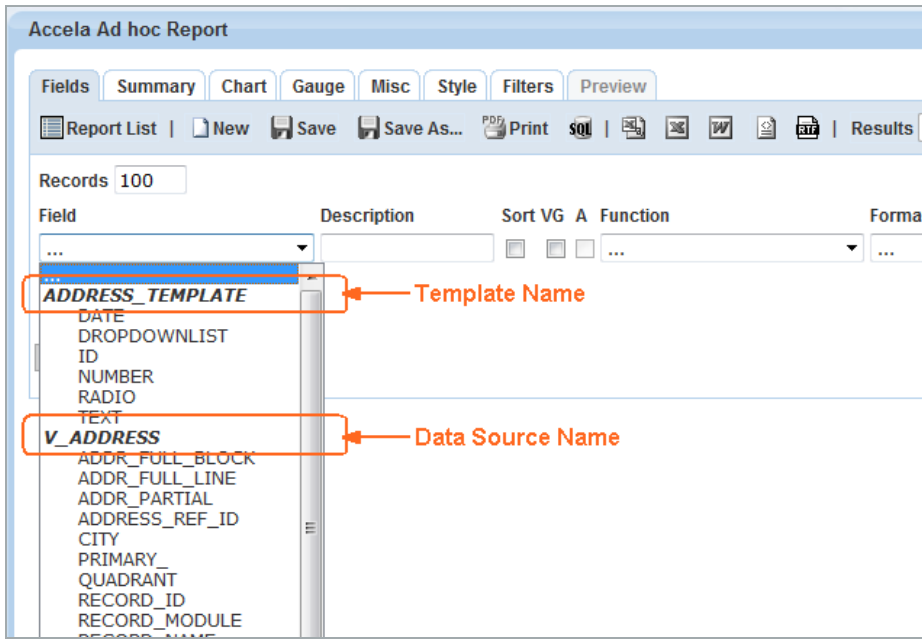
Note: Marking the Distinct check box inserts the DISTINCT clause into the sql SELECT statement you are building. After you select fields in the Fields tab, you can select the SQL button to see how the DISTINCT clause appears in the SELECT statement you are creating.

6. Select **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: Select [List of characters not accepted in Ad hoc reporting](#) to view the list of characters that are not supported in report fields.



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.

- 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 select **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.



Note: You can find a [List of characters not accepted in Ad hoc reporting](#).

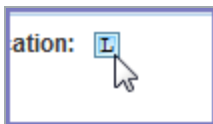
- Define how you want the field data displayed in your report. See [Fields tab](#) for information about field attributes.
- To add another field to your report, select to insert a field above the existing row, or to insert a field below the existing row. See the Tip in step 7 for an alternate method for adding fields.
- Repeat steps 7 and 8 for each new row.

11. If you want to add pivot columns to your report, select **Add Pivot** (see [Add 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, select **Design Form** (see [Ad hoc report form layout tool](#)).
13. When you finish adding fields, select **Continue to Summary**.
14. If you want to add a Summary section to your report, configure your summary report (see [Summary tab](#)).
15. Select **Continue to Chart**.
16. Select the type of chart you want to create. Configure your chart as described in [Chart tab](#). See [Ad hoc report 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. Select **Continue to Gauge**.
18. Configure your gauges as described in [Gauge tab](#).
19. Select **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. Select **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 select **Save As** in the toolbar.

Civic Platform prompts you to name a report and category (optional).

A dialog box with a light gray background and a thin black border. At the top, the text "Input report name" is displayed in a dark blue font. Below this text is a white text input field. Underneath the input field, the word "Category" is displayed in a dark blue font. Below "Category" is a white dropdown menu with a small downward-pointing arrow on its right side. At the bottom of the dialog box are two buttons: "OK" and "Cancel", both with gray backgrounds and black text.

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. Select **OK**.

Civic Platform saves your new report.

Add 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 predefined templates and what those templates are, see [Data Source Templates for Ad Hoc Reporting](#).

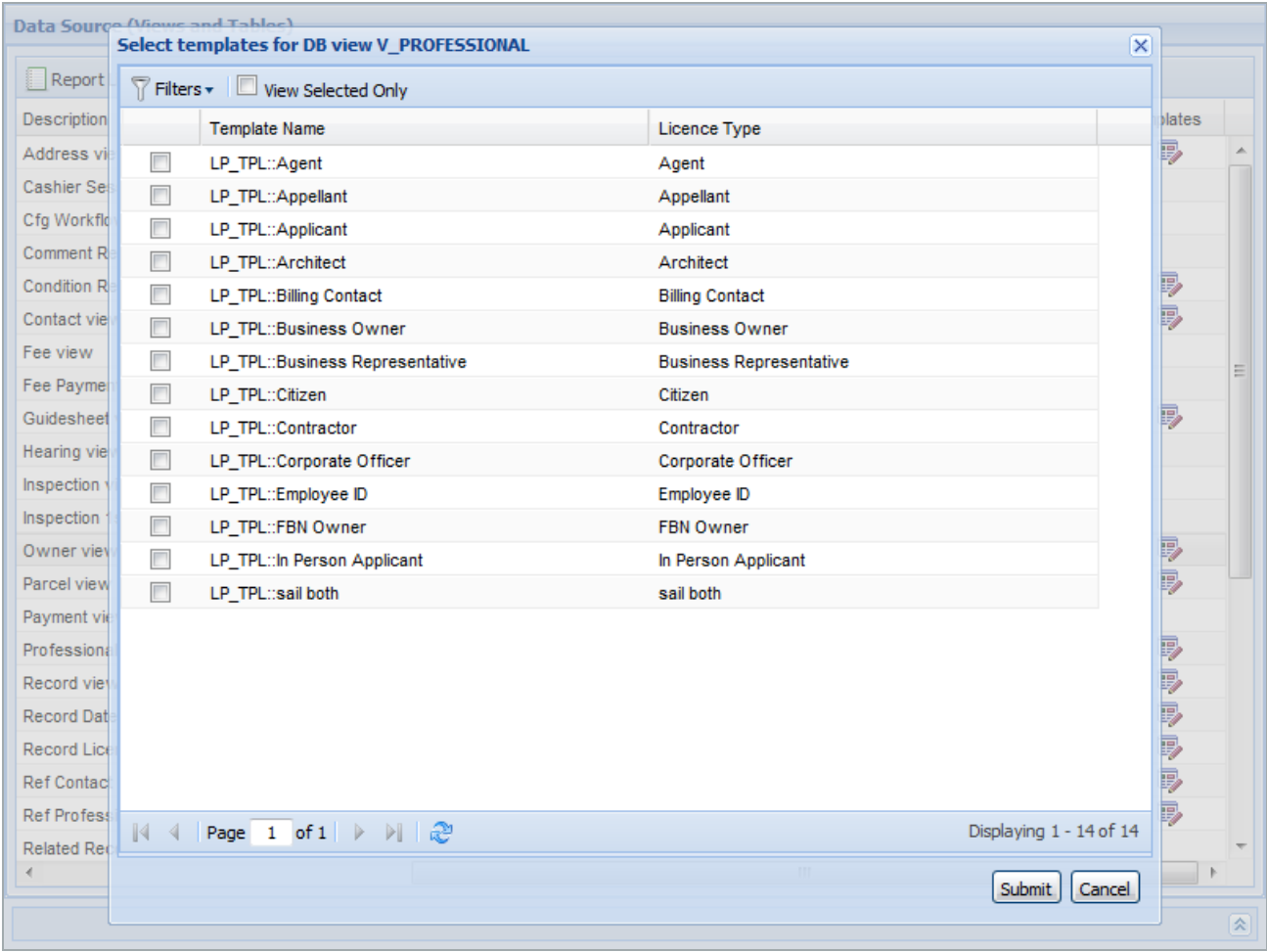
To add templates to your data source

1. In the Ad hoc Report portlet, open the Data Sources page either by creating a new report (see [Create new ad hoc reports](#)) or by opening an existing report and selecting the **Data Source** button.

The Data Source (Views and Tables) page displays.

2. Select 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, select **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. Select **Submit**.

Data Source Templates for Ad Hoc Reporting

Template Category	What Makes Up the Template Name	Description
ASI (application-specific information)	ASIT::ASIT Group Code::ASIT Subgroup Code	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.

Template Category	What Makes Up the Template Name	Description
fields)		
ASIT (application-specific information tables)	ASIT::ASIT Group Code::ASIT Subgroup Code	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.
TSI(task-specific information fields)	TSI::TSI Group Code	Civic Platform lists all TSI groups as templates for this data source: V_WORKFLOW.
Address Template	Address Template Name	Civic Platform lists all APO templates of the “ADDRESS” attribute type as templates for this data source: V_ADDRESS.
Parcel Template	Parcel Template Name	Civic Platform lists all APO templates of the “PARCEL” attribute type as templates for this data source: V_PARCEL.
Owner Template	Owner Template Name	Civic Platform lists all APO templates of the “OWNER” attribute type as templates for this data source: V_OWNER.
Checklist Template	GUIDESHEET_TPL::ASI Group Code	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.
Reference Contact Template	PEOPLE_REF::Contact Type	Civic Platform lists the people templates defined for each reference contact type as templates for this data source: V_REF_CONTACT.
Record Contact Template	PEOPLE_DALIY::Contact Type	Civic Platform lists the people templates defined for each record contact type as templates for this data source: V_CONTACT.
Record Condition Template	RECORD_COND_TPL::ASI Group Code	Civic Platform lists the ASI groups associated with each type of record conditions as templates for this data source: V_CONDITION_RECORD.
Standard Condition Template	STD_COND_TPL::ASI Group Code	Civic Platform lists the ASI groups associated with each type of standard conditions as templates for this data source: V_STANDARD_CONDITION.
Record Licensed Professional Template	LP_TPL::License Type	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.
Reference Licensed	LP_REF_TPL::License	Civic Platform lists the people templates defined for each reference licensed professional type as templates for this data

Template Category	What Makes Up the Template Name	Description
Professional Template	Type	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 [Create new ad hoc reports](#)) or by opening an existing report and selecting 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.

The screenshot shows the 'Accela Ad hoc Report' window. The 'Data Source (Views and Tables)' section is active, displaying a table of available data sources. Below this, the 'DB View Relationships' section is expanded, showing a list of selected data sources and a field for defining relationships.

Name	Description	Number of Selected Templ...	Templates
☐ V_ADDRESS	Address view	0	
☐ V_CONTACT	Contact view	0	
☐ V_GUIDESHEET	Guidesheet view	0	
☐ V_INSPECTION	Inspection view	0	
☐ V_OWNER	Owner view	0	
☐ V_PARCEL	Parcel view	0	
☒ V_PAYMENT	Payment view	0	
☐ V_RECORD	Record view	0	
☒ V_REF_PROFESSIONAL	Ref Professional view	3	

DB View Relationships

Please create the relationships between the selected DB views to show how the columns in one DB view are linked to columns in another DB view.

V_PAYMENT

3. From the first row of the DB View Relationships list, select the first data source from the drop-down list.

4. Select the  **Insert Row** button on the right side of the window.

Civic Platform inserts a new row.

5. Complete the new row as follows:

Row	Action
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.

6. To create another join between the same data sources, or between the one of the previously joined data sources and a third data source, select 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 group 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

Create a calculated column

You can create a calculated column for your report that performs basic arithmetic operations using field values.

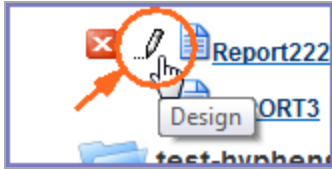
To create a calculated column

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 selecting 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** list.
6. Select 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:
 - Select the **Add new row below** button.
 - Select Field A from the Field drop-down list.
 - Type TOTAL in the Description.
 - Select the **Add new row below** button.
 - Select Field B from the Field drop-down list.
 - Select 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

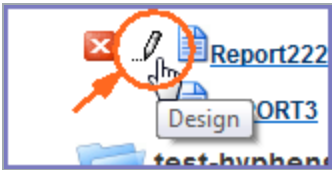
Add a pivot column

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 selecting the Design icon as shown.



The Report Designer opens.

3. On the Data Sources tab, select the V_INSPECTION data source.
4. On the Fields tab, set the following fields as shown:

Field	Description	Sort	VG	A	Function	Format
INSPECTION_TYPE	INSPECTION TYPE	☒	☒	☐	Group	...
DATE_INSPECTION	Number of Inspect	☐	☐	☐	Count	...
...		☐	☐	☐	...	...

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	

5. Return to the **Fields** tab and select **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.

☐ 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	

Design a new ad hoc report dashboard

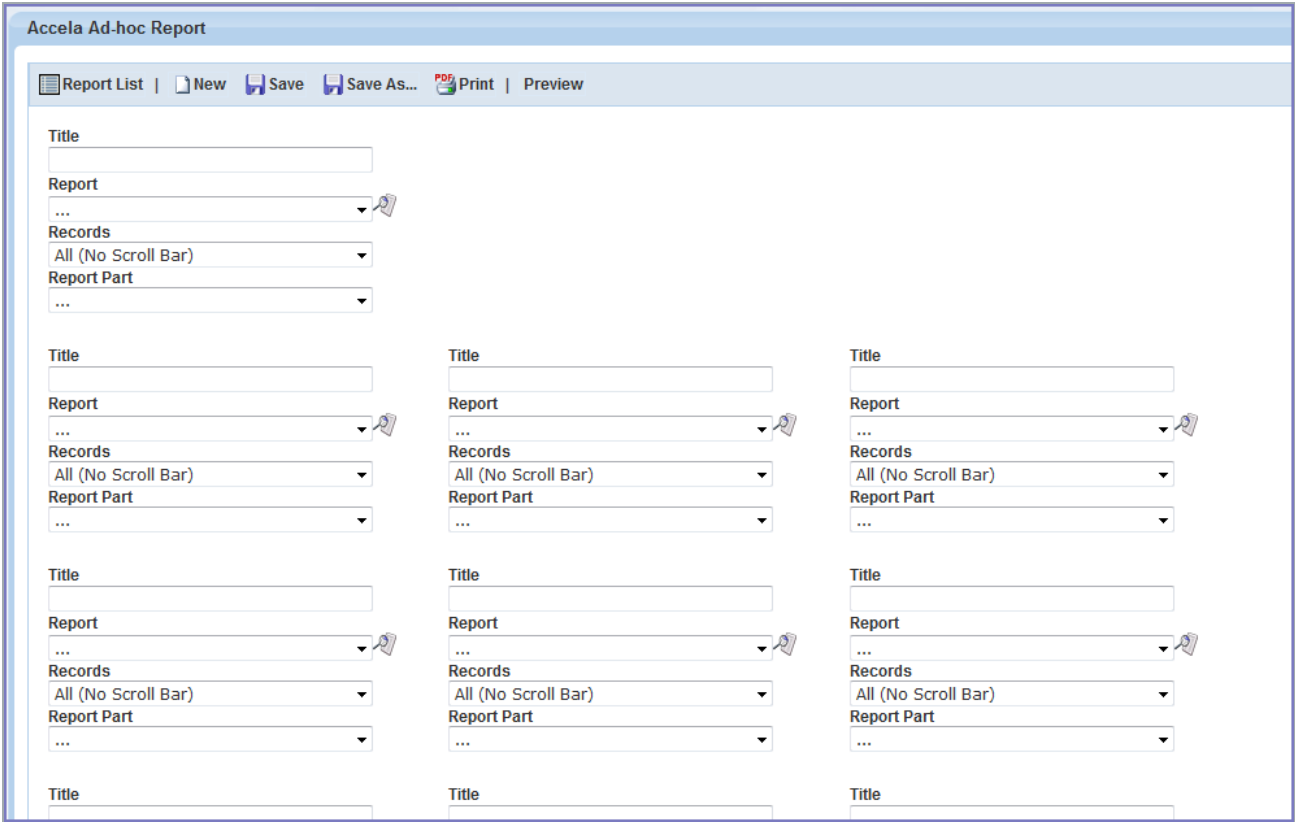
A dashboard is a convenience that enables you to set up a display that shows multiple report sections, such as a chart, a summary, or a list of fields, on a single page.

**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 page (see [Open the ad hoc report writer](#)).
- The Ad hoc Report page opens and displays the Report List.
- 2. Select **Design a new dashboard**.



- 3. In the first set of report selection fields, complete the following fields:

Field	Action
Title	Enter the title for the report.
Report	From the drop-down list of existing reports, select the report you want to add to your dashboard display.
Records	From the drop-down list, select the number of records to show.
Report Part	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, select the **Design** button.
- 7. When you finish, select **Save as**, enter a name for your dashboard, and select a category in which to store the dashboard.
- 8. Select **OK**.

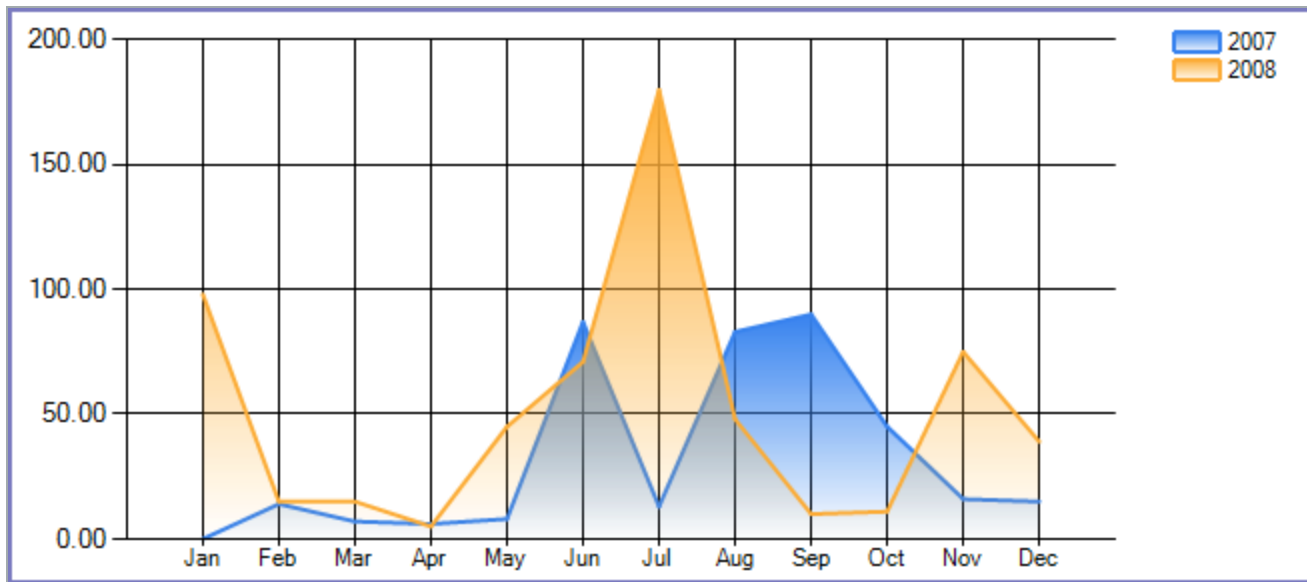
Ad hoc report graphs

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

Use a trend chart when you want to view the pattern of change in a data element over a period of time.

Trend Chart Example



To create a trend chart

1. Open the ad hoc report writer page (see [Open the ad hoc report writer](#)) and either select the Edit icon for an existing report, or select **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** 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** 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).

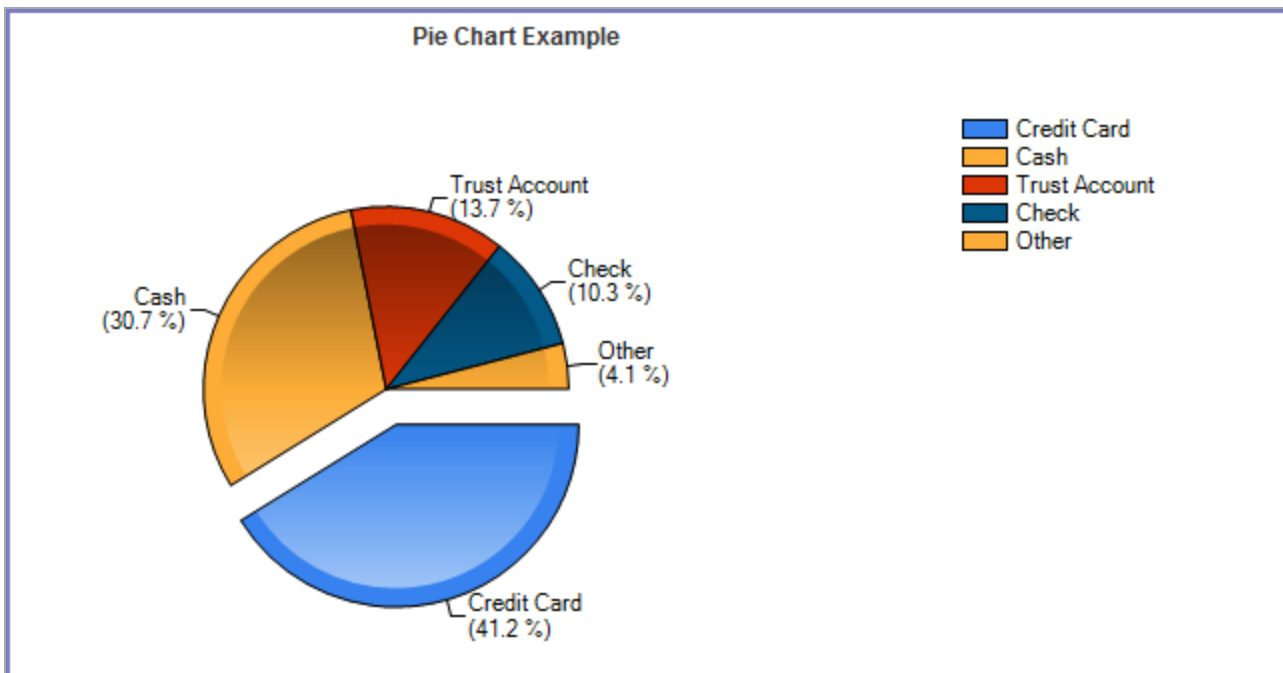
8. Select **Sort** to sort the values chronologically. If you do not check this box, the field labels may not appear as you expect them to.
9. From the **Value** list, select the field you want to use for the y-axis. Your selection is the value you want to track over time. For example, if you want to track the amount of payments received over time, you can choose the **Amount** field.
10. Select an option from the **Function** 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.

- Optional: Select **Advanced properties** to see additional chart settings.
- Complete additional chart attributes as described in [Trend chart fields and settings](#).
- Either save your work, or select **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.

Pie Chart Example



To create a pie chart

- Open the ad hoc report writer page (see [Open the ad hoc report writer](#)), and either select the **Edit** icon for an existing report, or select **Design a New Report**.
- If you are designing a new report, select one or more data sources. See [Data source section and DB view relationships section](#).
- Go to the **Charts** tab.
- From the **Chart type** list, select **Pie**.
- Enter a title for the chart in the **Title** field.
- Enter a number in the **Records** field to limit how many records you want to use to create the chart.
- Select a field from the **Label** 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** list to apply to the Label field (for example, Group).
9. Select a field from the **Value** list.

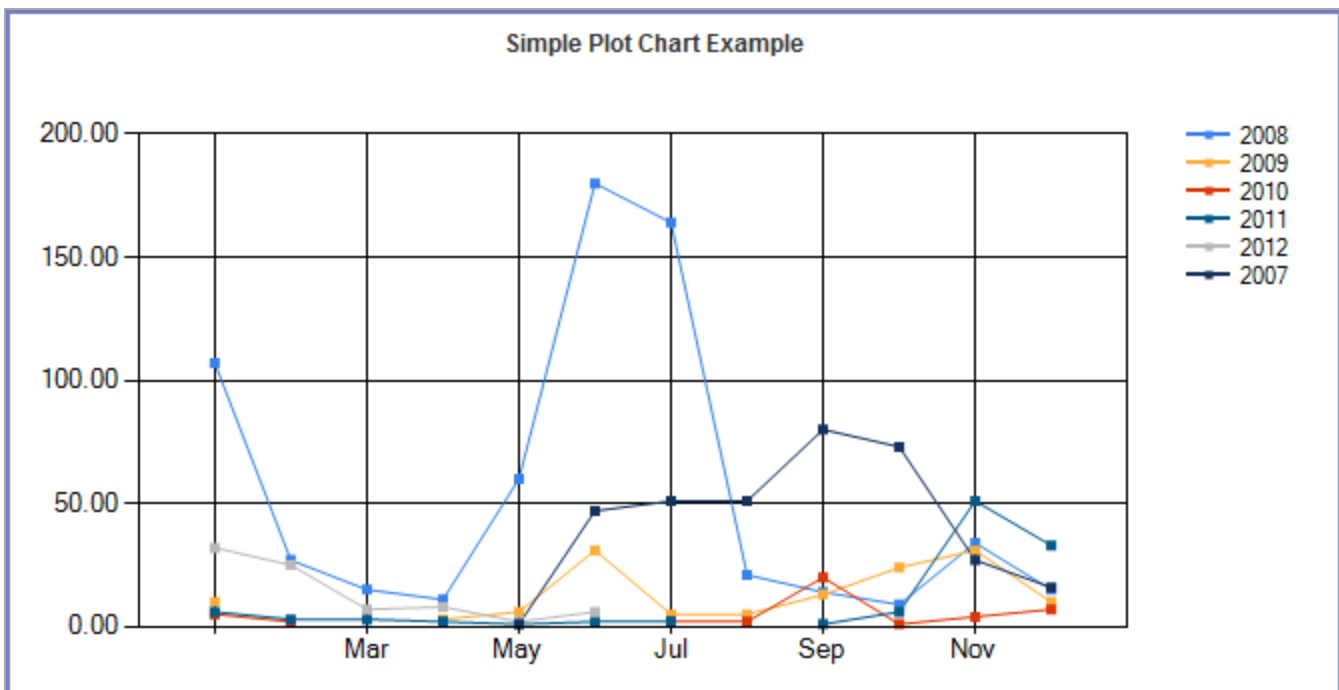
For example, you want to measure the percentage of total payments for each of five payment methods. You can use Amount as the Value.

10. Select an option from the **Function** list to apply to the Value field (for example, Sum).
11. Optional: Select **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 select **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.

Plot Chart Example



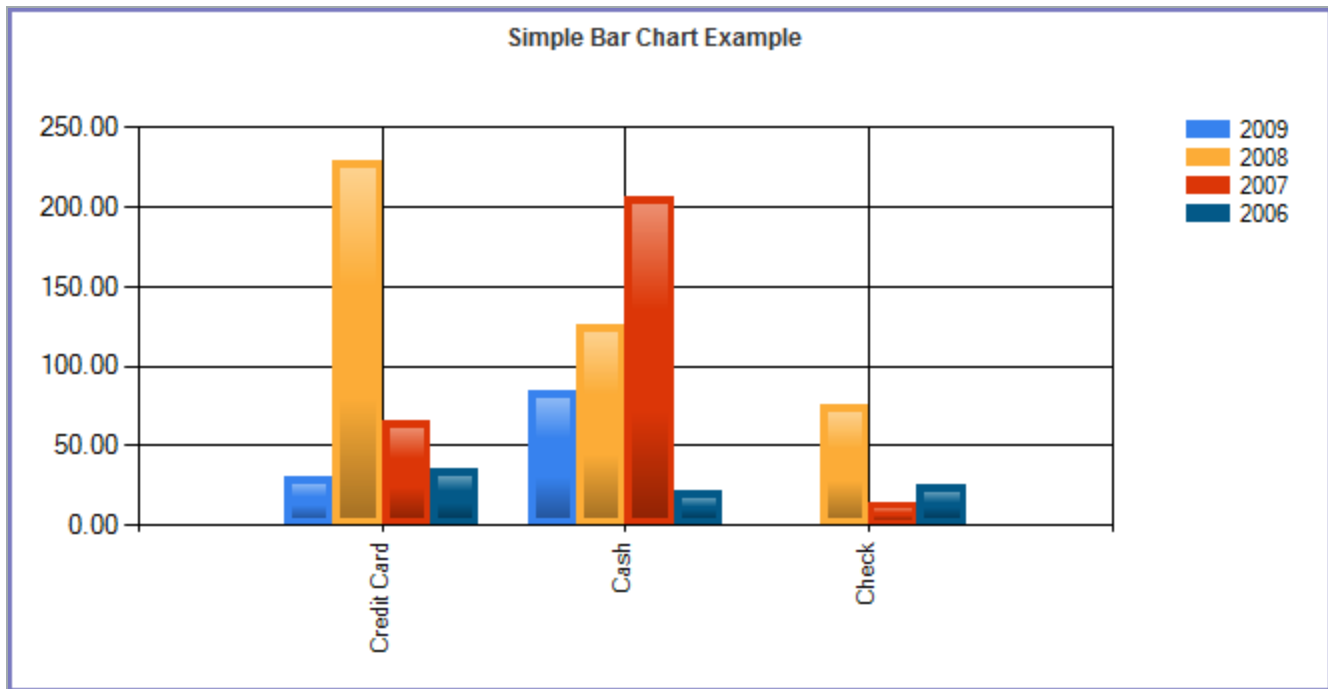
To create a plot chart

1. Open the ad hoc report writer page (see [Open the ad hoc report writer](#)), and either select the **Edit** icon for an existing report, or select **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** 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 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 list, choose a function to apply to the field you just selected (for example, Sum).
11. Optional: Select **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 select **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.

Bar Chart Example



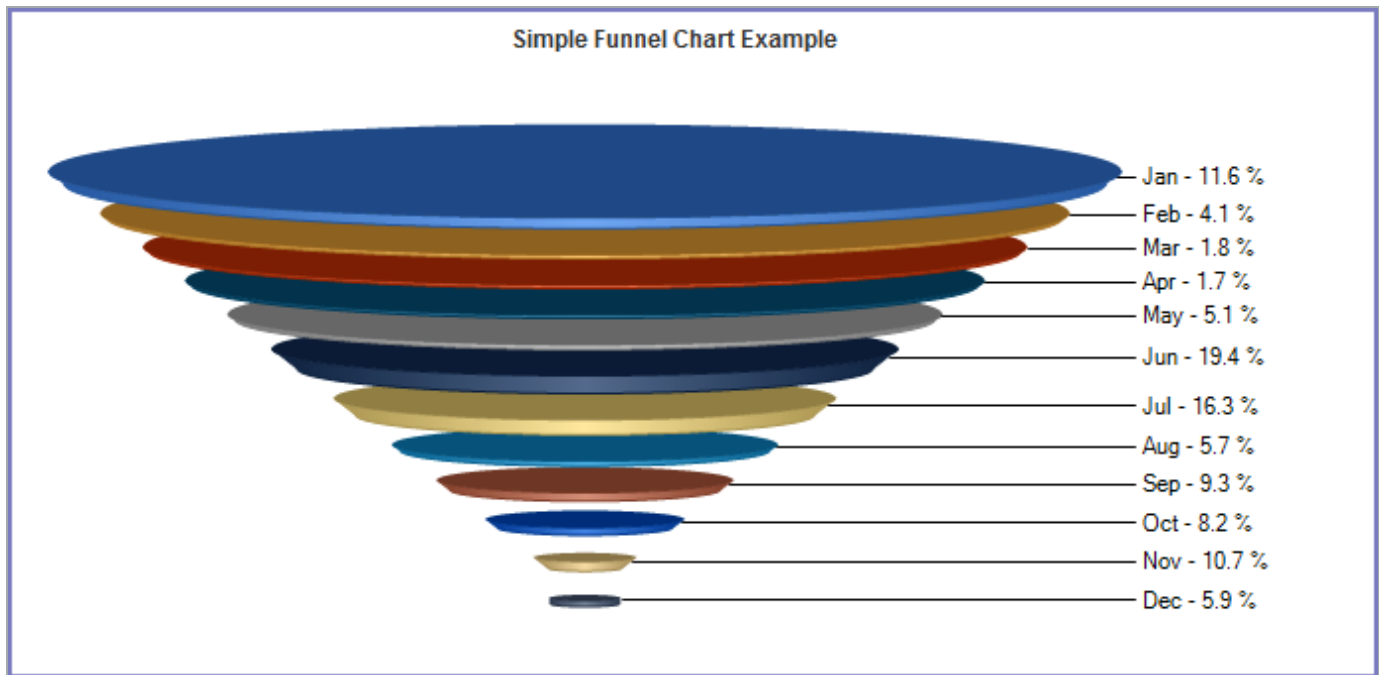
To create a bar chart

1. Open the ad hoc report writer page (see [Open the ad hoc report writer](#)), and either select the Edit icon for an existing report, or select **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** 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** 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** 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: Select **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 select **Continue to gauge**.

Funnel charts

Use a funnel chart to illustrate a sales analysis of potential revenue over a series of stages.

Funnel Chart Example



To create a funnel chart

1. Open the ad hoc report writer page (see [Open the ad hoc report writer](#)), and either select the Edit icon for an existing report, or select **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** 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** 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** 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).

- Optional: Select **Advanced properties** to see additional chart settings.
- Complete additional chart attributes as described in [Funnel chart fields and settings](#).
- Either save your work, or select **Continue to gauge**.

Ad hoc report categories

You can create, copy, and delete categories in reports.

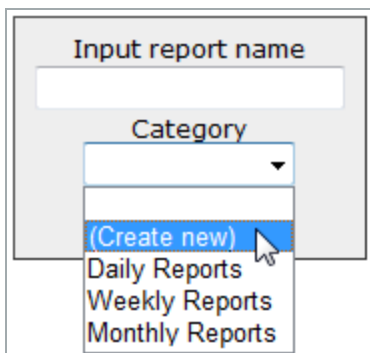
Create a new category

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

- Open the ad hoc report writer page (see [Open the ad hoc report writer](#)).
- 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.
- Select **Save as**.

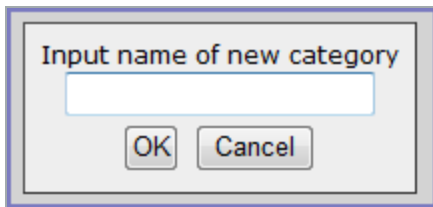
Civic Platform prompts you to input a report name and select a category to which to assign the report.



The screenshot shows a dialog box titled "Input report name". It contains a text input field for the report name. Below it is a "Category" dropdown menu. The dropdown menu is open, showing four options: "(Create new)", "Daily Reports", "Weekly Reports", and "Monthly Reports". A mouse cursor is pointing at the "(Create new)" option.

- From the **Category** 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. Select **OK**.

You are returned to the Input Report Name dialog with the new category name displayed in the **Category** field.

7. Select **OK**.

Civic Platform prompts saves the report name and new category, and the new category is now appears in the **Category** list for naming/assigning reports and dashboards.

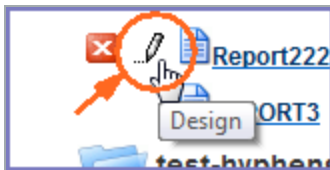
Copy a report to another category

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** list.

See [Create a new category](#).

To copy a report to another category

1. Open the ad hoc report writer page (see [Open the ad hoc report writer](#)).
2. Open the design form for an existing report/dashboard that you want to copy by selecting 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. Select **Save As**.

Civic Platform displays the current report name and category.

4. From the **Category** list, choose either another existing category or (**Create new**).
5. If you chose **Create new**, enter a category name and select **OK**. Otherwise, skip this step.

Civic Platform displays the Input Report Name dialog with the new category name showing in the

Category field.

6. Select **OK**.

Civic Platform copies the report to the new category.

Delete 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 [Copy a report to another category](#).
2. Delete each report and dashboard within the category you want to remove. See [Delete 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.

Ad hoc report 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.



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.

Related Information

- [Izenda Report Design Guide > Izenda Forms](#)

Create 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 [Create 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.

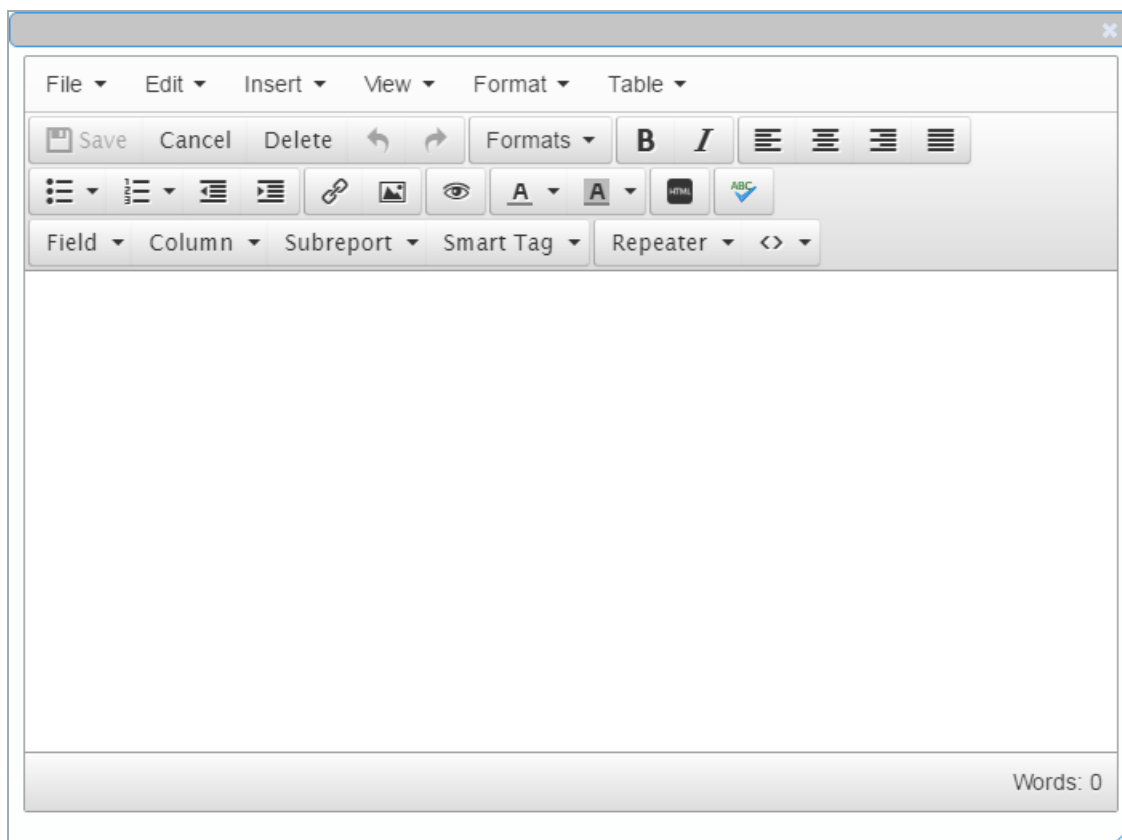


Note: Work with the Display Document Structure button  enabled to better see how your form layout is proceeding.

To create a form or letter

1. Open the ad hoc report writer page (see [Open 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. Select 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 [Add 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 [Add fields to a form](#)).
10. Insert horizontal lines, graphics, and page breaks as needed (see [Ad hoc report form layout tool](#)).
11. Format the text as you want it to appear. For example, apply a new font style and size to your header.
12. Select **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 [Create new ad hoc reports](#).

Create 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.

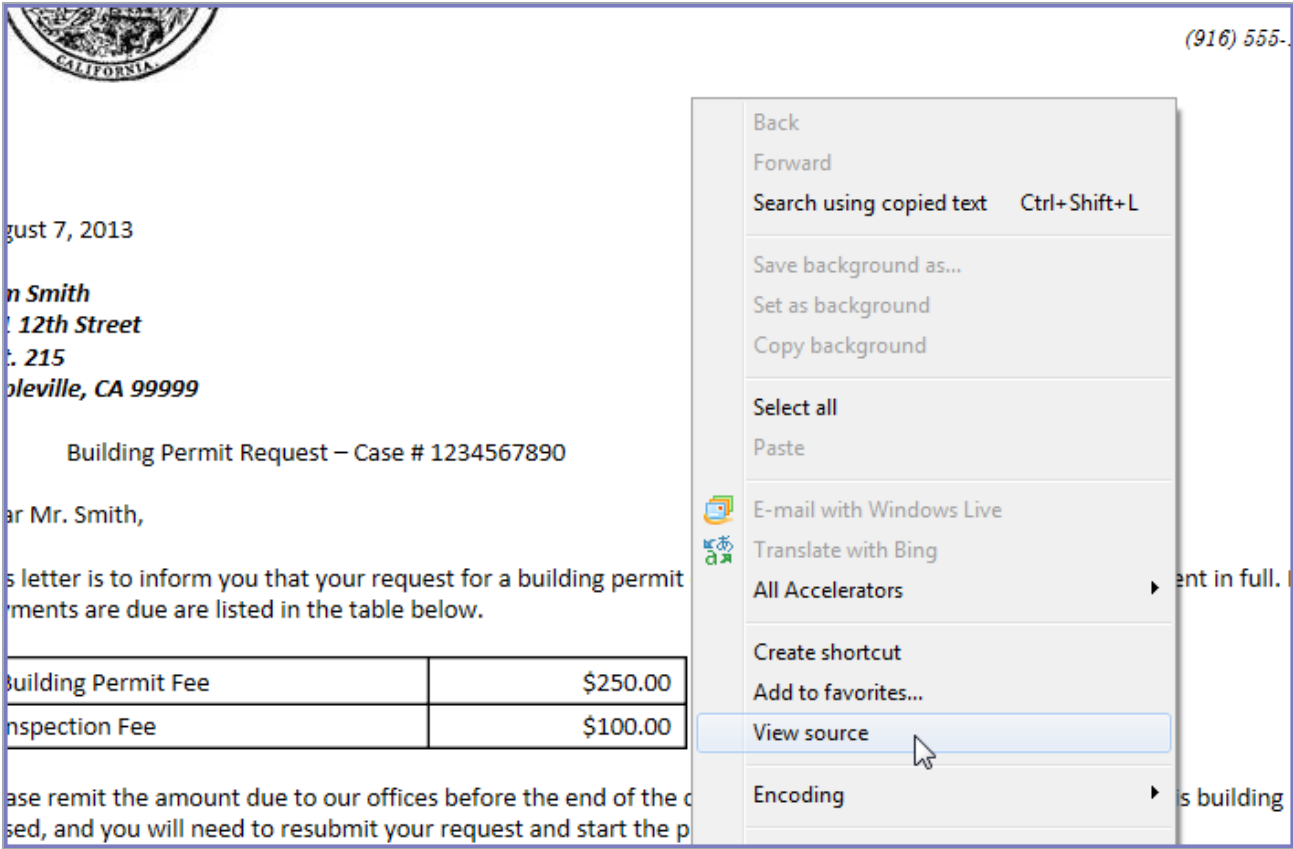


Note: Work with the Display Document Structure button  enabled to better see how your form layout is proceeding.

To create a form or letter using existing HTML code

1. Open the ad hoc report writer page (see [Open 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 HTM 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**.

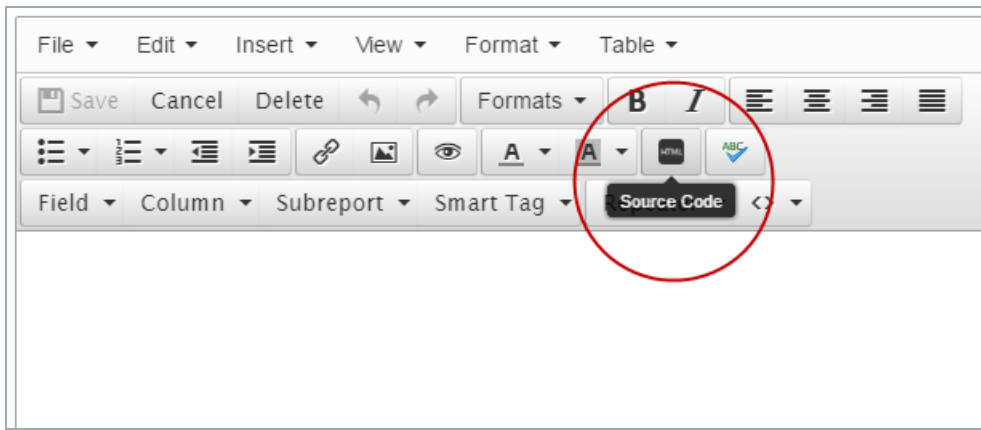
The source code for the page displays.

```

file:///C:/Users/jkemp/Documents/SAMPLE%20BUSINESS%20LETTER.htm - Original Source
File Edit Format
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. Select 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 select **Design form**.
13. Select 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. Select **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 [Add fields to a form](#)).
17. Insert horizontal lines, graphics, and page breaks as needed. (see [Ad hoc report form layout tool](#)).



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. Select **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 [Create new ad hoc reports](#).

Add 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.

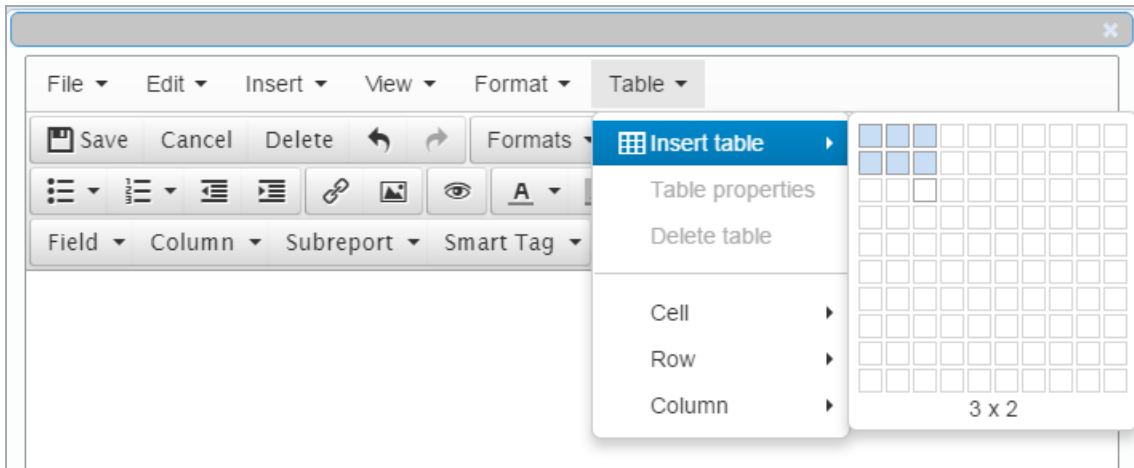
You can add a table to a form in the form layout tool with the click of a button. Use the table editing buttons to modify your table as needed.



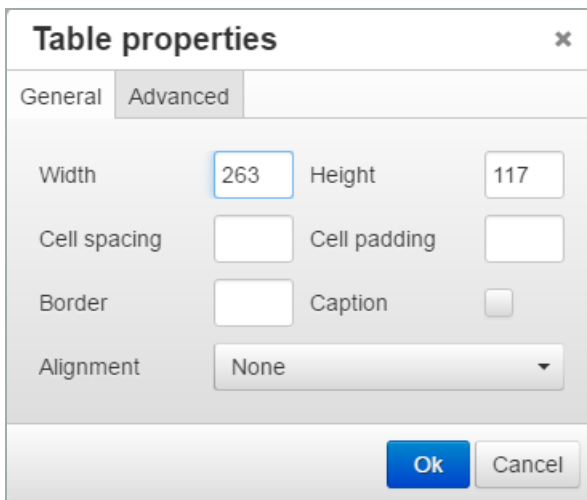
Note: Work with the Display Document Structure button  enabled to better see how your table appears. This is especially useful if you do not define borders for your table.

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**.



Add 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 [Add 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 [Create new ad hoc reports](#)).
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. Select 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. Add 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.

Add a horizontal rule

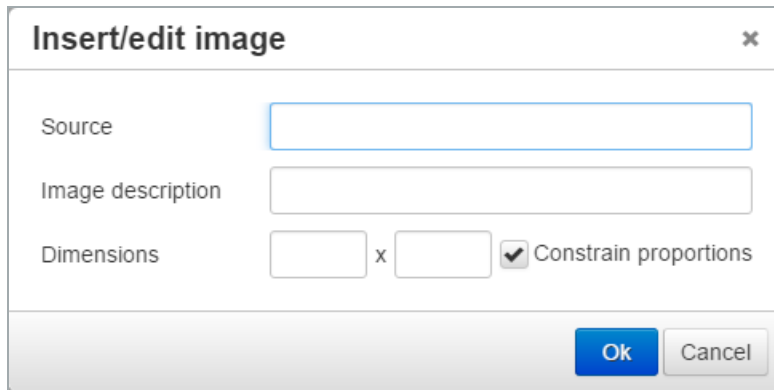
You can add a horizontal rule (line) to your form when you want to visibly distinguish one section of your form from another.

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.

Insert 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**.

A dialog box titled "Insert/edit image" with a close button (X) in the top right corner. It contains three input fields: "Source" (a text box), "Image description" (a text box), and "Dimensions" (two text boxes separated by an "x"). To the right of the dimensions fields is a checked checkbox labeled "Constrain proportions". At the bottom right are "Ok" and "Cancel" buttons.

Insert/edit image

Source

Image description

Dimensions x ☒ Constrain proportions

Ok Cancel

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.

Add a hyperlink to a form

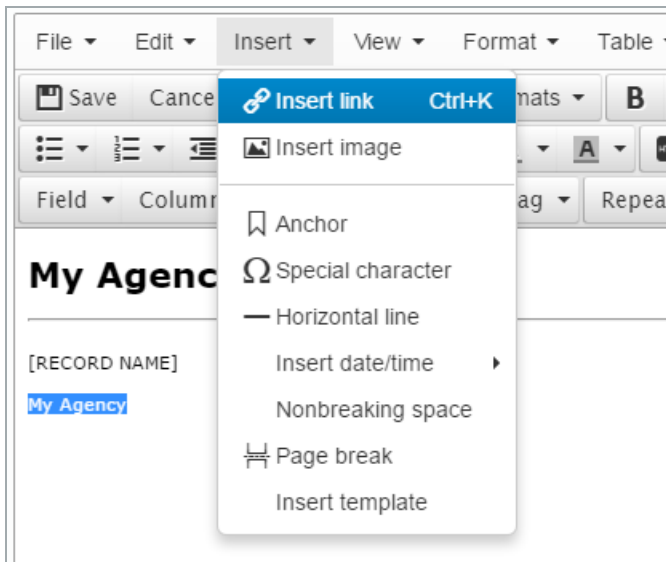
You can create hyperlinks in your forms as needed. When your report runs, the hyperlinks you created provide readers of the electronic report with a link to a URL you specify. For example, you can insert a hyperlink that customers can select to access your agency's website.

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.



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.

A screenshot of the 'Insert link' dialog box. It has a title bar with 'Insert link' and a close button (X). The dialog contains four input fields: 'Url' with the text 'www.myagency.com', 'Text to display' with the text 'My Agency', 'Title' (empty), and 'Target' with a dropdown menu showing 'None'. At the bottom right are 'Ok' and 'Cancel' buttons.

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. Select **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.

Add 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 select the link to see the agency address.

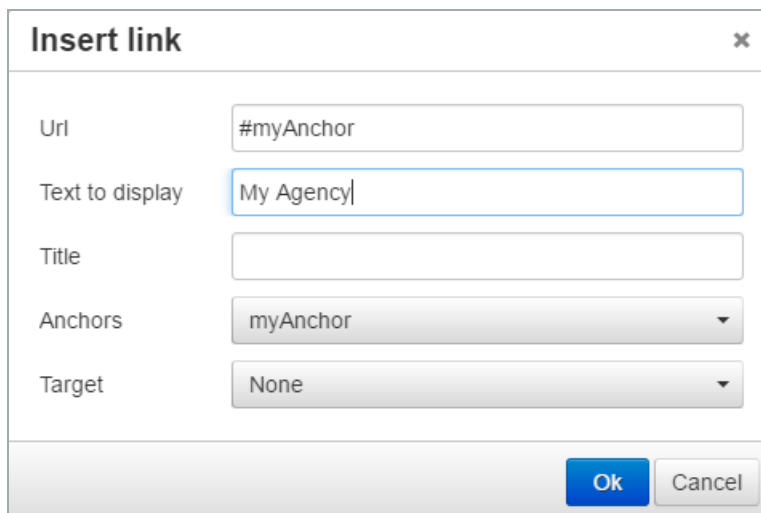
To add an anchor and create a link to that anchor

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.



Insert link	
Url	#myAnchor
Text to display	My Agency
Title	
Anchors	myAnchor
Target	None
Ok Cancel	

6. From the **Anchors** 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. Select **OK**.

Civic Platform displays the new link as a colorized, underlined object. When you run the report, or when you use Preview, you can test the link.

Ad hoc reports button and field reference

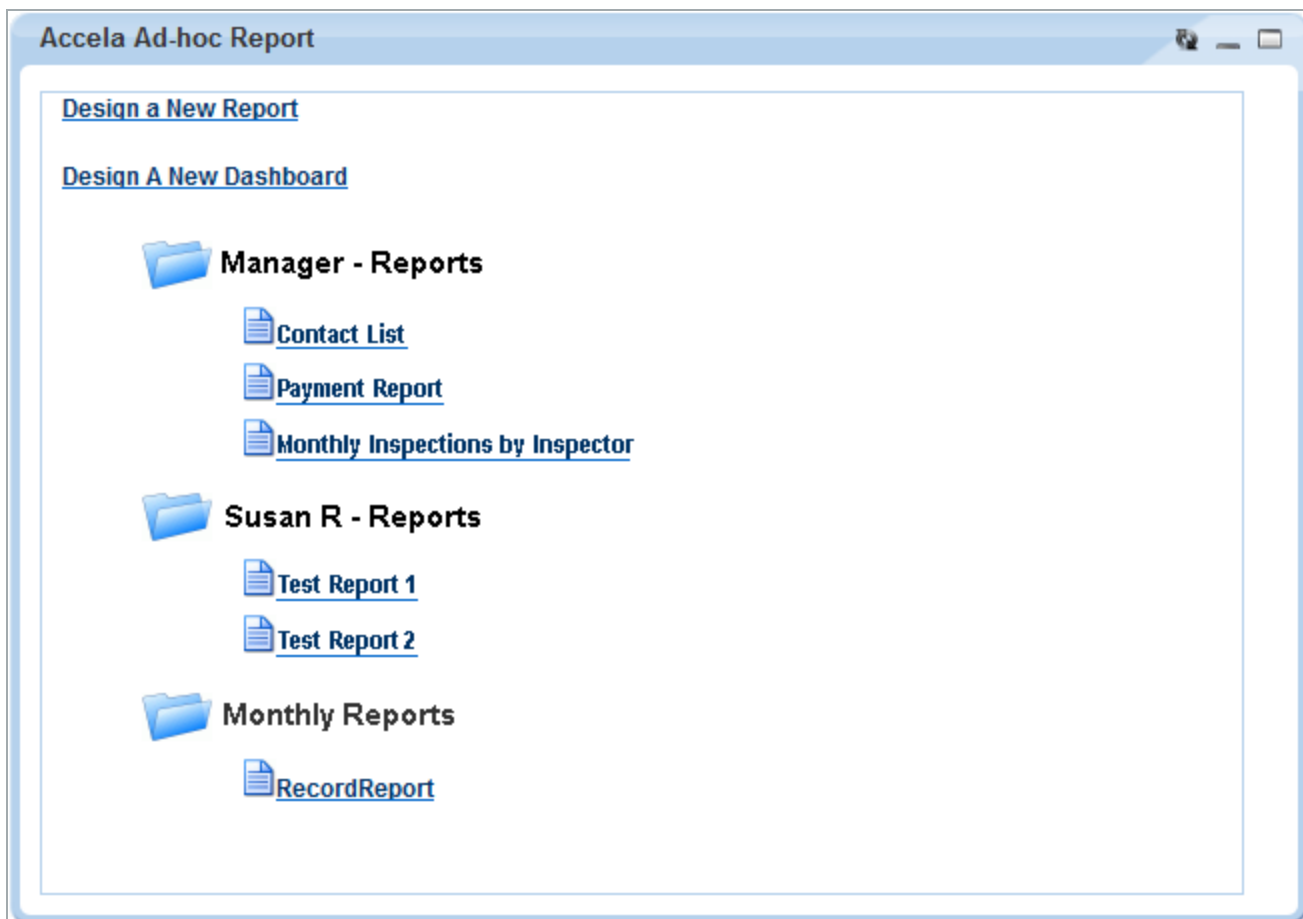
Whether you are creating a new report or a new dashboard, or accessing an existing report or dashboard, you use the ad hoc report writer. This section describe what you see both on the **Report list** page and on the **Report/dashboard designer**.

Additional Reference

- [Izenda's Report Design Guide](#)

What you see on the ad hoc report writer list

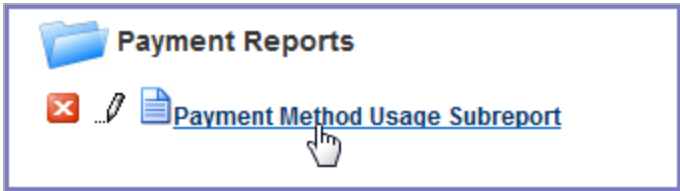
When you first open the ad hoc report writer, you see a display called the Report List. The display contains both a report list (organized by category), and hyperlink commands to design a new report and a new dashboard, as shown in the figure below. Selecting either of the Design hyperlinks opens the Report/Dashboard Designer.



The categories, or folders, are user-defined, and you can decide which reports or dashboards to assign to a category. Select 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.



Report Toolbar Icons

Button	Control Name	Description
	Delete	Select this button to delete the report.
	Edit	Select this button to edit the report. The Report Designer opens.
	Report Name	The report name is a hyperlink. When you select 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.

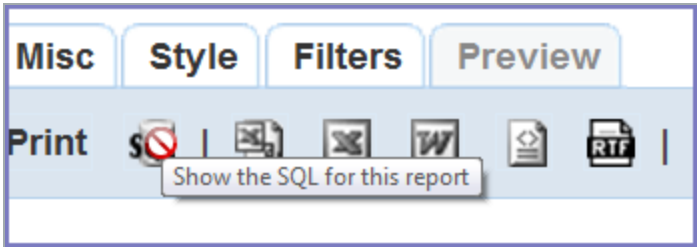
Topics

- [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

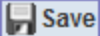
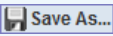
A common element to all the tabs on the Report Designer, the toolbar contains a series of buttons you can use while working in Report Designer.

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:

Button	Control Name	Description
	Report List	Returns user to the Report List page. If you did not save your report, you may lose your work.
	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 selecting New .
	Save	Saves a new report or saves changes to an existing report.
	Save As...	Saves a report with a new name, or an existing report to another category, or a new category (see Create a new category).
	Print	Prints your report to PDF. For a hard copy, you can print the PDF to your printer.
	SQL	Displays the SQL logic that defines your report.
	CSV	Exports the report to CSV (comma delimiter) format.
	Excel	Exports the report to Excel (XLS) format.
	Word	Exports the report to Word format
	XML	Exports the report to XML format.
	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.

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 customs 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.

Button/Field	Description
Report List	Returns user to the list of Accela ad hoc reports.
Add Fields	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.
Allow Nulls	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.
Distinct	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 select SQL to see how the DISTINCT clause appears in the SELECT statement that you are creating.

Button/Field	Description
Name column	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.
Description column	Provides a description of a data source.
Number of Selected Templates column	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.
 Templates button	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 Add templates to your data source .

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 select **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](#).

Fields, buttons, and basic field attributes on the fields tab

Attribute	Description
A	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 Create a calculated column for information.
Add Pivot	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 Add a pivot column for more information.
Add Subtotals	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

Attribute	Description
	and the function to use. If you want to change the subtotal function, use the Subtotal Function list in the Advanced Attributes to choose the function you want.
Continue to Summary	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.
Description	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.
Field	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 list auto-populates based on the data source(s) you define.
Format	This field attribute defines how you want the data for a given field to display. The contents of this attribute list varies, depending on the field type. For text fields, this list is empty. For number fields, you have a variety of options. See Format Options for Numerical field types and Format Options for Date field types for formatting options.
Function	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 Function Attribute Options for available Function options.
Preview	Shows a preview of the report you are creating.
Records field	This restrict the number of records returned when you preview the report. For example, if you enter 25 and then select Preview, your report displays only 25 rows of data.
Sort	This sorts the rows in your table in ascending order based on a given field. To sort rows in descending order, go to Advanced Field Settings .
VG	This changes the field values for the current field into subheadings, grouped by field value. See Visually group by field value for more information about using visual grouping.
Hide Grid	Hides or shows table grids for report styling.
Remove All	Removes all fields from the report in the Viewer.

For descriptions of the advanced field attributes, see Izenda's [Advanced Field Settings](#).

Function Attribute Options

Function Name	Description
Group	Groups field values together for aggregating
Count	Counts the number of values in a column.
Count Distinct	Counts the number of distinct values in a column.

Function Name	Description
Sum	Sums the value in a field.
Average	Takes the average value of a field.
Maximum	Takes the maximum value in a field.
Minimum	Takes the minimum value in a field.
Group(Date),(Day), (Month),(Year)	Groups a date field by value.

Format Options for Numerical field types

Format Option	Description	Examples
0,000	Displays the number as a whole number.	11231,2341,234,567
\$0.00	Displays the number as currency	\$123.45\$0.12
0.0	Displays the number with one decimal place	123.5
0.00	Displays the number with two decimal places	123.46
0.000	Displays the number with three decimal places	123.456
0%	Displays the number as a percentage	1%12%

Format Options for Date field types

Format Option	Description	Examples
Short Date	Displays the date using the mm/dd/yyyy format	8/1/1996
Long Date	Displays the day of the week, month, numeric day, and the year	Friday, August 09, 1996
Short Time	Displays time as hh:mm AM/PM	12:34 AM
Long Time	Displays time as hh:mm:ss AM/PM	12:34:56 PM
Full(short)	Displays the Long Date format, followed by the Short Time format	Friday, August 30, 1996 4:34 PM
Full(long)	Displays the Long Date format, followed by the Long Time format	Wednesday, October 23, 1996 2:28:37 AM
D&T (short)	Displays the Short Date format, followed by the Short Time format	3/12/1996 7:45 PM
D&T (long)	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, select 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, select 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.

 **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.

Function Name	Description
Title	This is the title for the report summary.
Records	This restrict the number of records returned when you preview the report. For example, if you enter 25 and then select Preview , your report displays only 25 rows of data.
Field	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 list auto-populates based on the data source(s) you define.
Description	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.
Sort	This sorts the rows in your table in ascending order based on a given field. To sort rows in descending order, go to Advanced Field Settings .
Function	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 Function Attribute Options for available Function

Function Name	Description
	options.
Format	This field attribute defines how you want the data for a given field to display. The contents of this attribute list varies, depending on the field type. For text fields, this list is empty. For number fields, you have a variety of options. See Format Options for Numerical field types and Format Options for Date field types for formatting options.
Add Subtotals	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 list in the Advanced Attributes to choose the function you want.
Add Deltas	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.
Continue to Chart	When you finish defining a report summary, select this button to move to the next tab and the next set of actions: setting up charts.
Preview	Shows a preview of the report you are creating.

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 [Ad hoc report 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.

Function Name	Description
Separator/Function	If you want to compare multiple sets of data on the same chart, use the Separator list to define the field you want to use to separate your data. For example, you can

Function Name	Description
	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 Trend Chart Example for an example.
Show Legend	Displays a legend for your chart.
Show Value Labels	Displays the value of each data point.
Smooth	Changes the trend line from angular to smooth.
Label Title (Bottom)	This is the label for the x-axis.
Label Title (Left)	This is the label for the y-axis.
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.

Function Name	Description
Separator/Function	If you want to break out the data into multiple sets, use the Separator 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.

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. When you run the report, the sub-report displays when you invoke the effect you choose in the Effect field.
Effect	This is the effect you want to use to display the sub-report selected in the Target Report field. Choices are Popup (sub-report displays in a popup upon select of a pie slice), Hover (sub-report displays in a window when you hover over a pie slice), and Link (sub-report displays in a new window when you select 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.

Function Name	Description
Separator/Function	If you want to compare multiple sets of data on the same chart, use the Separator 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.
Show Legend	This displays a legend for your chart.
Connect	This connects the plot points on the chart with a line.
Auto-Scale	
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.

Bar chart fields and settings

When you select a bar chart, the following fields and settings are available for you to configure.

Function Name	Description
Separator/Function	If you want to compare multiple sets of data on the same chart, use the Separator 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 Bar Chart Example for an example.

Function Name	Description
Line Value	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.
Show Legend	This displays a legend for your chart.
Show Pareto	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.
Stacked	Select this option if you use a separator value and you want to display the bars in stacked format rather than side by side,
Horizontal	Select this option to display your bar chart horizontally rather than vertically (default display).
Shade Area Under Line	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.
Label Title (Bottom)	This is the label title for the bottom value set of your chart. This title corresponds to the Label data set.
Value Title (Left)	This is the label title for the left side value set of your chart. This title corresponds to the Value data set.
Value Title (Right)	This is the label title for the left side value set of your chart. This label corresponds to the data set for either the Line Value field or the Pareto plot. If you are using neither of these, this field becomes disabled.
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.

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.

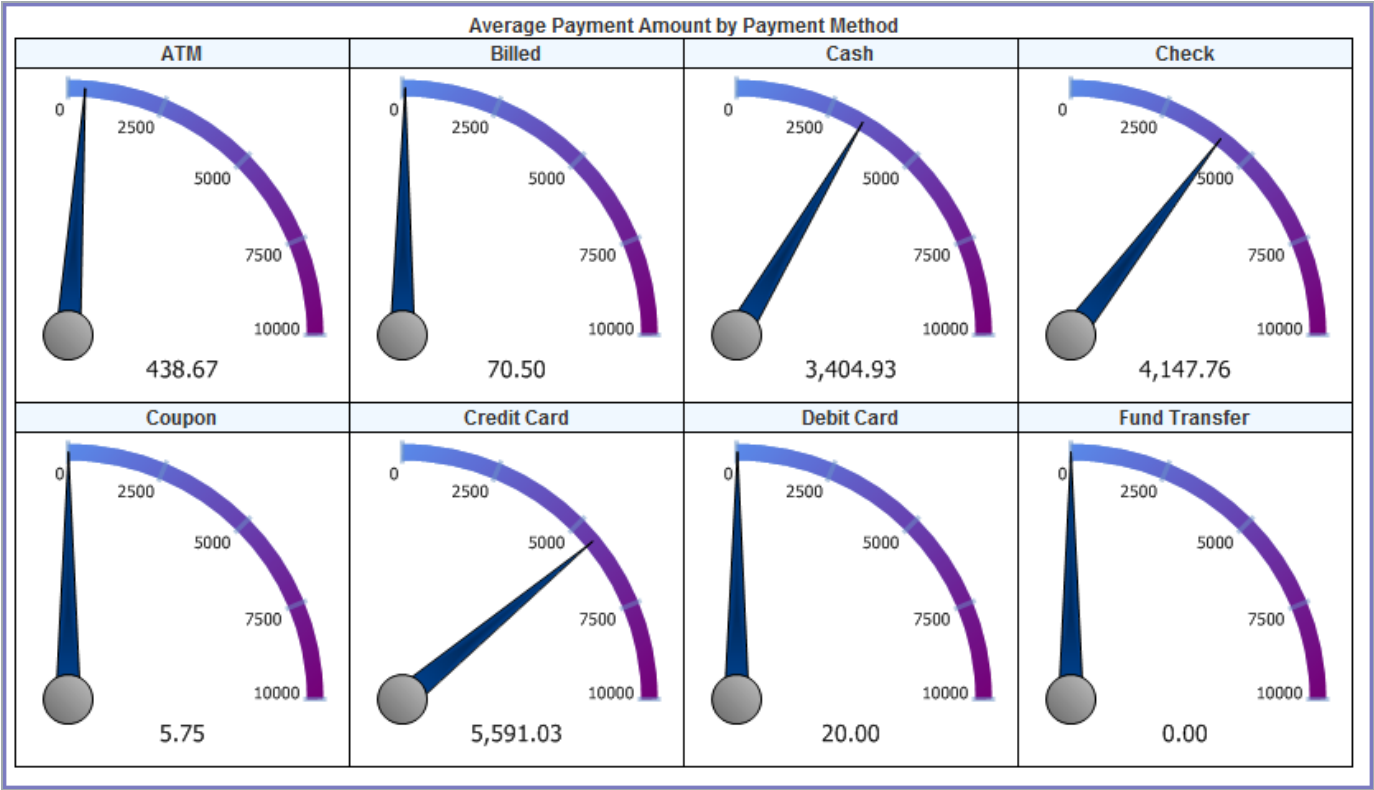
Gauge tab

In the **Gauge** tab, you can add one or more radial or linear gauges to a report.

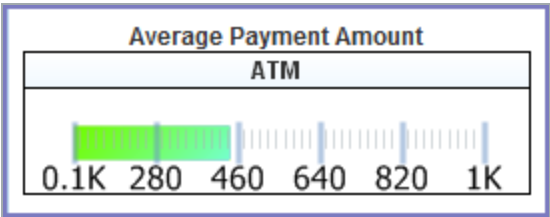
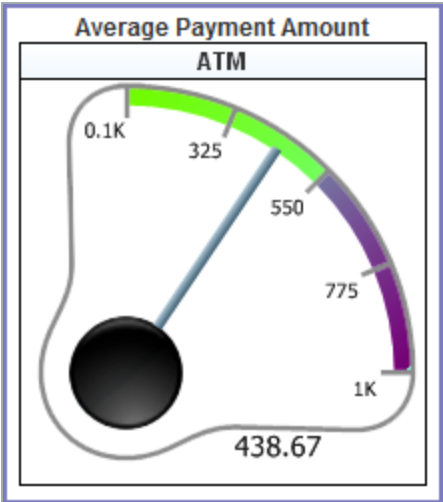
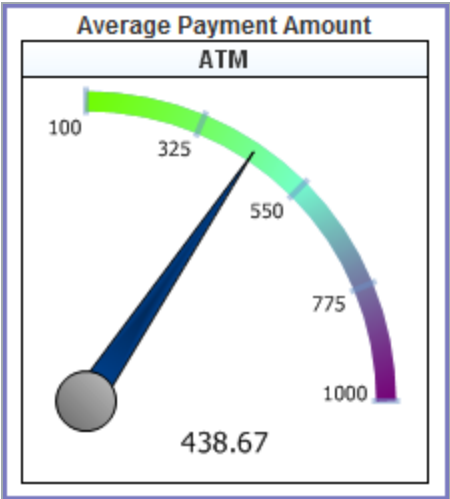
For additional reference, see also [Izenda's Gauge Tab documentation](#).

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.



You can choose from three types of gauges. Each type is illustrated in the following figures.



The following table lists and defines the fields and attributes on the Gauges tab.

Attribute	Description
Color	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: #%:ColorName , where #

Attribute	Description
	is the percentage value and ColorName is the color you want to apply. You can enter multiple values, separating each value with a semicolon. For example: <pre>0%:LawnGreen;50%:CornflowerBlue;100%:Purple</pre> To see what colors are available to use, go to the Style tab and view the list for any element color field.
Continue to Misc	When you finish creating gauges, select this button to move to the next tab and the next set of actions.
Gauge Style	This is the gauge style to be used in your report.
Minimum/Maximum	These fields define the range of values to use for the gauge.
Name	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.  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 Filters tab.
Results	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.
Preview	This runs a preview of your report so you can check your report output.
Sort/Function	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.
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.
Title	Enter a title for the gauge or panel of gauges.
Value/Function	Choose a field from the 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

Attribute	Description
	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.

Field/Button	Description
Description	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.
Drill-down Key	This defines the drill-down key for use with a sub-report (as defined in the Target Report field on the Charts tab).
Footer	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.
Header	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.
Owner	This field identifies the user name of the individual who created the current report.
Share With/Rights	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.
Title	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.

Field/Button	Description
Border Color, Header Color,	This allows you to select a color from for each table element. Refer

Field/Button	Description
Header Foreground Color, Item Color, Item Foreground Color, Alternating Item Color	to the Sample Grid below the Restore Default button to see how the colors you choose, appear.
Restore Default	This restores the default color settings for the six color fields.
Landscape Printing	This prints your report in landscape page format.
Show Page Number	This displays page numbers on PDF output reports.
Show Date and Time	This displays the date and time of the report run on PDF output reports.
Use Pagination in Webview	This enables readers to see pagination in web view. Normally, pagination is not applicable in web view.
Add Bookmarks for Each Visual Group	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.
Page Break after Visual Groups (PDF)	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.
Minimize grid width	This trims the width of the columns in your table to match the widest field value, eliminating unused space.
Visual Group Style	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.
Items per Page (in viewer)	This limits the number of rows displayed per page in your report viewer.
Report Order	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.
Field/Value Column Pairs	This sets the field value style, which can be useful for accounting and financial reports.
Show main report in Field/Value Style	This changes the main report table to display in the Field/Value style defined in Field/Value Column Pairs field.
Show summary report in Field/Value Style.	This changes the summary report table to display in the Field/Value style defined in Field/Value Column Pairs field.
Continue to Filters	When you finish setting styles, select this button to move to the next tab and the next set of actions.
Preview	This runs your report and check your report output.
Enable Responsive Grid	Check this box to enable responsive grids. For details, see http://wiki.izenda.us/Guides/ReportDesign/12.0-Pivots-in-Izenda .

Field/Button	Description
Pivot columns per exported page	Specifies the number of pivot columns on an exported page. For details, see http://wiki.izenda.us/FAQ/Responsive-Grid .

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:

Field/Button	Description
Filter Field	This defines the field on which to filter the data returned from your data source(s).
Operator	This defines the operation to perform on the field you selected as the Filter Field.
Values	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."
Blank	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.
Param	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.
Show Filters in Report Description	This writes a read-only summary of the report filters you created to the Description field for the report.
Require X Parameters in Viewer	This option require the reader of the report to set one or more filter values before the report contents display.
Preview	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 select 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.

 You must create reports before you can add them to a Dashboard display. See [Create new ad hoc reports](#)

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.

Fields/Buttons	Description
New	Creates a new report and opens the Report Designer.
Preview	Previews your dashboard design.
Print	Prints your dashboard to your computer's default printer.
Records	This is the number of records to show; includes All and All (No scroll bar).
Report	This is the report you want to add to your dashboard display.
Report List	This returns you to the Report List view.
Report Part	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.
Save	This saves your dashboard.
Save as	This allows you to save your dashboard with a new name and/or to assign your dashboard to a category.
Share With/Rights	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.
Title	This is the title for the report

Addresses

The address functions in Civic Platform keeps track of the addresses and owners related to an asset or work order. When you add addresses to Civic Platform, they are stored in a central database referred to as a reference database.

A reference database acts as a library that allows you to search for certain types of stored information.



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 permissions, 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.

Reference addresses

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.

Depending on your access rights, 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.



Note: Contact you agency administrator with questions about access to this feature.

Add 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. From the **Addresses** page, select **New**.
2. Complete any of the fields that display. See [Address details](#) for more information.
3. As needed, import address details from an external permitting system.

4. Select **Submit**.

Search 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. From the **Addresses** page, enter search criteria as needed to locate an 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 details](#). The additional fields are active attributes defined in the address template in Civic Platform.

2. Select **Submit**.
3. To view a list of work orders or assets associated with the address, select the **Record detail** tab.

Copy 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 copy a reference address

1. From the **Addresses** page, search for address(es).
2. Select the check box next to the address you want to copy.
3. Select **Copy**.



Note: 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 details](#) for field definitions.
5. Select **Submit**.

Edit 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. From the **Addresses** page, find and open an address.
2. Update field data as needed. See [Address details](#) for field definitions.
3. Select **Submit**.

Addresses within 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.

Add 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 page. One or more addresses can be selected from this page and automatically associated with the work order or asset.

To add an address from your reference database

1. From the **Work orders** or **Assets** page, find and open a work order or asset record.
2. Select the **Address** tab.
3. Select **Look Up** to locate a reference address.
4. Enter search criteria as needed to locate the address you want.
5. Select **Submit**.
6. Select the check box next to the addresses you want to add.
7. Select **Select**.
8. Select **Submit**.

Add 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.



Note: 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. From the **Work orders** or **Assets** page, find and open a work order or asset record.
2. Select the **Address** tab.
3. Select **New**.
4. Complete any of the fields that display. For descriptions of common fields, see [Address details](#).
5. Select **Submit**.

View associated work orders and assets

Reference addresses associated with a work order or asset can be viewed from the addresses page. 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. From the **Addresses** page, find and open an address.
2. Select either the **Work orders** or **Assets** tab.
3. Open the work order or asset that you want to view.

Edit 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. From the **Work orders** or **Assets** page, find and open a work order or asset record.
2. Select the **Address** tab.
3. Open the address that you want to edit.
4. Edit any of the fields that display. For a description of the fields, see [Address details](#).
5. Select **Submit** to save your changes.

Remove 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. From the **Work orders** or **Assets** page, find and open a work order or asset record.
2. Select the **Address** tab.
3. Select the check box next to the addresses you want to delete.
4. Select **Delete**.

Add, apply, or delete address contacts

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.

Add a contact to an address

Associate a new contact with an address.

To associate an address to a contact

1. On the **Address** page, select the **Contact** tab.
2. Select **New**.
3. Complete the required fields and others as needed. See [Contacts details](#).
4. Select **Submit**.

Search 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. On the **Address** page, select the **Contact** tab.
2. Select **Look up**.
3. Enter the search criteria in the contact field(s.)
4. Select **Submit**.
5. Select the check box next to the contact you want to associate with the address.
6. Select **Select**.

Delete 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. On the **Address** page, select the **Contact** tab.
2. Select the contact you want to delete.
3. Select **Delete**.

Associate 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. From the **Addresses** page, find and open an address.
2. Select the **Associated public user** tab.
3. Select **Look Up**.
4. Enter search criteria as needed and select **Submit**.
5. Select the check box next to the public user whom you want to associate with the address.
6. Select **Connect**.



Note: Civic Platform creates a link between the address and the public user.

7. If necessary, complete any of these options:
 - Select the link for the public user to view to view public user details.
 - Select the check box next to the public user you want to remove the link between an address and a public user and then select **Delete**.

View PM schedules for an address

You can view a list of preventative maintenance (PM) schedules linked to a given address.

To view PM schedules for an address

1. Navigate to the **Address** portlet.
2. Select the address which you want to view the linked PM schedules.
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.

Fields	Description
Last Date	The Schedule Date of the last work order for this address.
Next Date	This field equals to the Next Schedule Date configured in the PM schedule.
Previous Work Order Number	The number of the work order that is generated most recently by the PM schedule for the address.

Add external addresses

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 preventative maintenance (PM) schedules. When you search records, assets, or asset condition assessments, you may search by their associated external addresses.

From the **Address** page, 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. Find and open the desired record.
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**.

Address details

The following table lists and defines the default fields that may be available as you work with addresses.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Fields	Description
Address Description	A description of the address.
Address Line 1	The first line of the address.
Address Line 2	The second line of the address.
Address Type Flag	The current status of this address record. You cannot associate disabled addresses with a work order or asset. Use the list menu when searching to find either Disabled or Enabled addresses or both.
Address Type	The address type code for this address record.
Audit Date	The date when the address was created or modified.
Audit ID	The identification code of the person who created or modified the address.
Audit Status	The status of this address record.
City	The city in which the address is located.
Country/Region	The country or region in which the address is located.
County	The county in which the address is located.
Description	A description of the address.
Direction	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.
Distance	Enter a distance from another landmark used to locate the address.
End Fraction	In combination with the Street # fields, it indicates a fractional street number. You can specify a range of factional street numbers in the corresponding Start and End fields.
Event ID	Any event scheduled for this address.
House # Alpha (end)	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.
House # Alpha (start)	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.
Inspection	The inspection district in which the address is located.

Fields	Description
District	
Inspection District Prefix	The prefix for the inspection district in which the address is located.
Level # (end)	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.
Level # (start)	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.
Level Prefix	The prefix for the level numbers (floor numbers) that make up the address.
Neighborhood	The neighborhood in which the address is located.
Neighborhood Prefix	The prefix for the neighborhood in which the address is located.
Prefix	Any part of the address that should come before the street name or number, such as a direction. For example “north” in North Willow Drive.
Primary	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.
Reference Address ID	The identification of the reference address.
Secondary Road	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.
Secondary Road Number	The number of the address’s secondary road.
Source Flag	The Accela permitting system that stores this address information, such as Civic Platform, Kiva, or Tidemark.
Source Number	A number that identifies the Accela permitting system that stores this address information.
Start Fraction	In combination with the Street # fields, it indicates a fractional street number. You can specify a range of factional street numbers in the corresponding Start and End fields.
State	The state in which the address is located.
Street # (Start/End)	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.
Street Address	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

Fields	Description
	supports multiple languages, enter the address in the secondary language.
Street Name	The street name for this address.
Street Suffix (Direction)	Use the list menu 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.
Street Type	Use the list menu to choose a type of street, such as “Lane” or “Boulevard.”
Unit # (Start/End)	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.
Unit Type	The type of structure for this address, for example, apartment or condo.
X Coordinate	If you use a GPS device, this indicates the longitudinal coordinate for this address.
Y Coordinate	If you use a GPS device, this indicates the latitudinal coordinate for this address.
ZIP Code	The zip code in which the address is located.

Assets

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.

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.

Create a new asset

You may need to create a new asset in Civic Platform when your agency acquires a 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.



Note: Your agency 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. Contact your agency administrator with questions.

Depending on your agency's configuration, 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 depreciation. For information on asset depreciation calculation, see [Asset depreciation values](#).

To create an asset

- 1. From the **Assets** page, select **New**.
- 2. From the **Asset group** list, select the desired asset group.

 **Note:** You should add the asset to the same group as similar assets.

- 3. From the **Asset type** list, select the desired asset type.
- 4. Complete the required fields and others as needed.

 **Note:** To calculate depreciation value, complete the following fields: **Start value**, **Date of service**, **Useful life**, and **Salvage value**.

- 5. Select **Save**.

View 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.

Asset list and detail page example

Assets

Menu

Search

New

New WO

GIS

Delete

View Log

Help

Asset Group

--Select--

Asset Type

--Select--

Asset ID

Attribute Name

--Select--

Attribute Value

Filter

1

☐	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

Asset ID: FH-00002

Menu

Save

Reset

Recalculate Value

Clone

Help

Asset Detail

Address (0)

Work Order (0)

Linked Assets

Documents (0)

PM Schedules (0)

Condition (0)

Condition Assess

Asset Group

Water

Status

In Service

Asset Type

Fire Hydrant

Status Date

01/31/2012

Class Type

Point

Asset ID *

FH-00002

Asset ID Links

Asset ID

Record Tabs

#	Description
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** page and use **Search** to locate the asset record.
2. Select the asset ID link in the Asset ID column.
3. To update an asset, see [Update asset details](#).

Search for an asset

An agency may have thousands of assets. You can quickly filter your assets list by selecting your asset group and asset type from the list menus in the **Asset list** page 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. From the **Assets** page, select **Search**.

Civic Platform displays the **Asset search** page.

 **Notes:**

- 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 [for more information](#).

2. Complete the fields for which you want to perform your search.

- For a description of the asset detail fields, see [Asset details](#).
 - For a description of the address fields, see [Address details](#).
 - For a description of the work order fields, see [Work order fields](#).
3. After you enter all the desired search parameters, select **Submit**.

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



Note: 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.

Update asset details

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.

Update 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 page and use **Search** to locate the asset record.
2. Click the asset ID link in the **Asset ID** column.
3. Select the **Asset detail** tab.
4. Complete the fields with available data. See [Asset fields](#) for field definitions.
5. Select **Save**.

Update 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 page and use **Search** to locate the assets that need to be updated (see [Search for an asset](#)).
2. Select the assets you want to update.



Note: You may select assets of the same type or of different types.

3. Select **Menu > Group update**.
4. Complete the fields common to the selected asset types. 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 details](#).
5. Select **Save**.

Set 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 [Attach files](#). For information on linked assets, see [Linked assets](#).

To set an asset display image

1. Navigate to the Assets page and locate the asset record. See [Search for an asset](#) for more information on searching for an asset.
2. Select the Asset ID link for the asset record to add a display image.
3. Select the **Documents** tab.
4. Select the image you want to use as the display image.
5. Select **Display image**.



Notes:

- The **Display image** column value changes to **Y**. The image displays the image in the Asset detail page.
- The display image also appears in the linked assets detail page. The asset's own display image is visible by default on this page.
- 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 page.

Print 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. From the **Asset** page, do one of the following:
 1. To print the list of assets, select **Menu > Print** from the list of assets page.
 2. To print asset details, open the asset, select the **Facility detail** tab, and select **Menu > Print**.
2. Use your browser’s print command to print the asset.



Note: Depending on the browser you use to view PDF files, you may have the option to save the asset information as a PDF or send it as an email attachment.

Clone 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.



Example: When cloning 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. From the **Asset** page, open the asset you want to clone.
2. Select **Clone**.
3. Complete the following fields:

Field	Action
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.

4. Select **Submit**.



Note: Civic Platform displays an **Asset clone summary report**. To print the report, select **Print**.

5. Select **Complete**.

Add, view, and delete associated parts to an asset

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 select 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](#).

Associate a part to an asset

Associate parts to asset records so that part information is readily accessible.

To associate a part to an asset

1. From the **Assets** page, find and open the asset record you want to update.
2. Select the **Associated parts** tab.
3. Select **Look up**.
4. Enter search criteria in the available fields. See [Part inventory fields](#) for field definitions.
5. Select **Submit**.
6. Select the part you want to associate to the asset.
7. Select **Select**.
8. Make changes to the **Quantity** or **Comments** fields, if desired. The default quantity is 1.
9. Select **Save**.

View 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. From the **Assets** page, find and open the asset record you want to update.
2. Select the **Associated parts** tab.
3. Select the part name hyperlink.
4. Make changes to the **Quantity** or **Comments** fields, if desired. The default quantity is 1.
5. If you have made changes, select **Save**.

Delete 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. From the **Assets** page, find and open the asset record you want to update.
2. Select the **Associated parts** tab.
3. Select the part you want to delete from the asset record.
4. Select **Delete**.

Linked assets

Assets may be associated with other assets.



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 they lie in as well as the pipes beneath them. A building might be linked to the furniture and equipment within 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 to each other.

Parent-child relationships may be created between assets. 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-child relationship is made, a child-parent relationship is established at the same time.

The combined relationship of assets to each other is called an asset hierarchy. This hierarchy is displayed in a tree view on the **Linked asset** tab of the asset record. This view shows the current asset record as the parent, as well as any child assets. Child assets are organized by asset type.

When a plus sign appears by an asset, you can select it to show the children of that asset. If you want to view a child asset as a the top-level parent in the hierarchy, right-click the asset and select **Move up** (you may need to select **Move up** more than once).

An asset that is a parent to one asset may be a child to another asset. For example, a traffic signal is a parent to a luminar and a child to a control box.

Filter 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. From the **Assets** page, find and open the desired record.
2. Select the **Linked assets** tab.
3. Select one or more options in the filter section below the hierarchy tree, and then select **Filter**.

View the asset condition assessment history

You can look at which condition assessments have been completed for a given asset.

To view an asset condition assessment history

1. From the **Asset** page, open the asset for which you want to view the condition assessment history.
2. Select the **Condition assessment** tab.
3. Select the **Condition assessment ID** link you want to review.

View PM schedules for an asset

You can view the list of preventative maintenance (PM) schedules that a given asset is linked to.

To view PM schedules for an asset

1. From the **Asset** page, open the asset for which you want to view the PM schedules.
2. Select the **PM schedules** tab.
3. Select the PM schedule you want to view.

Most fields in the list are standard PM schedule fields. See [Preventative maintenance schedule fields](#). The following additional fields give more information on the PM schedules with the asset.

Field	Description
Last date	The Schedule Date of the last work order for this asset.
Last usage	The usage reading of the asset when the PM schedule generates the last work order for the asset.
Next date	This field equals to the Next Schedule Date configured in the PM schedule.
Next usage	This field equals to the Last Usage value plus Usage Interval configured in the PM schedule.
Previous work order number	The number of the work order that is generated most recently by the PM schedule for the asset.

Add, edit, or delete asset usage

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.

Add 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. From the **Asset** page, open the asset for which you want to add a usage reading.
2. Select the **Usages** tab.
3. Select **New**.
4. Enter the current **Reading**.
5. Select the unit type from the **Unit type** list menu.

6. Select a reading date in the **Reading date** field.
7. Complete any other fields as necessary. For a description of the fields, see [Asset usage fields](#).
8. Select **Submit**.

Edit an 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. From the **Asset** page, open the asset for which you want to edit a usage reading.
2. Select the **Usages** tab.
3. Open the **Reading** details for the usage reading you want to modify. For a description of the fields, see [Asset usage fields](#).
4. Review, update, or print the details as necessary.
5. After making any changes, select **Submit**. To close the reading without saving, select **Cancel**.

Delete 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. From the **Asset** page, open the asset for which you want to delete a usage reading.
2. Select the **Usages** tab.
3. Select the check box(es) next to the asset usage readings that you want to remove from the asset.
4. Select **Delete**.

Asset depreciation values

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 history of all depreciation calculations performed on each asset. You can view an asset's depreciation history to see all past depreciation calculations.

Asset depreciation formulas

Civic Platform calculates asset depreciation 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.



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 = Depreciation Period x Depreciation per Year

Depreciation Value = Start Value - Depreciation Amount

Current Value = Start Value - Years Elapsed x Depreciation per Year

Remaining Life = Useful Life - 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 fields to be completed.

- **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](#).

If any of these fields is left blank, Civic Platform skips the depreciation calculation and displays an error message.

Calculate 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. From the **Assets** page, find and open the desired asset.
- 2. Complete the asset fields that act as the criteria in the asset depreciation formulas. See [Asset depreciation formulas](#).
- 3. Select **Recalculate value**.

 **Note:** Civic Platform updates the following three fields of the asset: Depreciation Amount, Depreciation Value and Current Value.

Perform asset group depreciation

You may need to calculate the depreciation for a group of assets or all assets in your agency. Civic Platform gives you the option to perform group depreciation.

To perform asset group depreciation

- 1. On the **Assets** page, select the check box next to each asset you want to perform depreciation on. You may select assets of the same type or of different types.

 **Note:** Skip this step if you plan to perform group depreciation for all the assets in the current list.

- 2. Choose **Menu > Group depreciation**.
- 3. Set the depreciation options.

Option	Description
Through Date	The depreciation end date. This field defaults to the current date. Adjust as needed.
Depreciation For	Select whether to calculate depreciations for the selected assets or all assets in the current list. The Selected Assets Only option does not display if you skipped step 2.

- 4. Select **Recalculate**.

 **Note:** Civic Platform displays the Group Depreciation Report, which shows 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.
- **Recalculation succeeded** displays the number of calculations that succeeded for the asset.
- **Recalculation failed** displays the number of calculations that failed for the asset. For information on why an asset fails in depreciation calculation, see [Asset depreciation formulas](#).

5. (Optional) Select **Menu > CSV export** to export the report to a CSV (comma-separated value) file.
6. To exit the group depreciation report, select **Close**.

View 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. From the **Assets** page, find and open the desired asset.
2. Choose **Menu > Depreciation history**.
3. Do one of the following:
 - Export the log to a CSV (comma-separated value) file by selecting **Menu > CSV export**.
 - Remove a history record by selecting the check box next to the record and then selecting **Delete**.

Add, edit, and delete 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 on the administrator page, 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.



Note: If you want to define cost rates for some types of assets but the **Cost rates** tab does not display on the **Assets** page, contact your agency administrator.

Add an asset cost rate

If your agency administrator has enabled the **Asset as resource** option for an asset, 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. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Cost rates** tab.
3. Select **New**.
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 fields](#).

5. Select **Submit**.

Edit 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. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Cost rates** tab.
3. Select the ID link of the cost rate you want to modify.
4. Modify the details as necessary. For a list of field descriptions, see [Asset fields](#).
5. Select **Submit**.

Delete 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. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Cost rates** tab.
3. Select the asset cost rates that you want to delete.
4. Select **Delete**.

Add, edit, and apply asset conditions

Asset conditions, also known as critical notices, can be identified within Civic Platform.



Example: Manholes may 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 be similar to this: “Excessive toxic gas in manhole. Manhole must be forced to air vent for one hour before entering.”

Asset conditions specify requirements for 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.

When an asset is linked to a work order, the work order checks for active conditions on the asset. If the asset has one or more active conditions, a message displays at the top of the page, showing the highest severity condition and the total number of conditions. If the asset has an active lock condition, the work order cannot be saved. See [Asset conditions on work orders](#) for more information.

Create and add a new condition to an asset

To create and add a new condition

1. On the **Assets** page, find and open the desired record.
2. Select the **Condition** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Asset condition fields](#) for a description of the fields.
5. Select **Submit**.

Add an existing condition to asset

To add an existing condition

1. On the **Assets** page, find and open the desired record.
2. Select the **Condition** tab.
3. Select **Look up**.
4. Enter the search criteria needed to locate the desired asset condition. See [Asset condition fields](#) for field definitions.

5. Select **Submit**.
6. In the list of results, select the check box next to the asset condition(s) you want to add to the asset, and then select **Select**.

Edit a condition on an asset

Asset conditions may be updated as necessary.

To edit a condition

1. On the **Assets** page, find and open the desired record.
2. Select the **Condition** tab.
3. Select the name of the condition you want to edit.
4. Update the fields as needed. See [Asset condition fields](#) for field definitions.
5. Select **Submit**.

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 displays 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 and the following error message displays: "Record cannot be created because there are lock conditions."

When you generate work orders with preventative maintenance (PM) schedules, the generation process skips assets with an 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 [Generate work orders using PM schedules](#).

Create, view, and delete 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.

Create an asset rating

After inspecting an asset, the inspector can create a rating for the asset.

To create an asset rating

- 1. From the **Assets** page, find and open the desired record.
- 2. Select the **Ratings** tab.
- 3. Select **New**.
- 4. Complete the required fields and others as needed.

Field	Description
Rating type	The rating type your administrator associates with the asset.
Rating value	The value for the selected rating type.
Department	The department responsible for rating the selected asset.
Inspector	The inspector responsible for rating the selected asset.
Rating date	The date of the asset rating.
Rating time	The time of the asset rating.

- 5. Select **Submit**.

View a chart for 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 selecting the **Close** button.

To view a chart for rating values

- 1. From the **Assets** page, find and open the desired record.
- 2. Select the **Ratings** tab.
- 3. In the **Rating type** column, select the desired link.
- 4. Select a rating value and select **Chart**.

Delete rating values

You can delete rating values as needed.

To delete rating values

1. From the **Assets** page, find and open the desired record.
2. Select the **Ratings** tab.
3. Select a **Rating type** link.
4. Select a rating value and select **Delete**.

Create, associate, and remove asset contacts

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.



Note: In order to use this feature, your agency administrator must complete the necessary configuration.

Create an asset contact

You can create a contact and associate it with an asset.

To create an asset contact

1. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Contact** tab.
3. Select **New**.
4. Complete any fields that display.

For a description of the fields, see [Contacts details](#).

5. Select **Submit**.



Note: Civic Platform creates the contact, associates it with the selected asset, and displays it on the **Contact list** page.

Associate 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. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Contact** tab.
3. Select **Look up**.
4. Complete any fields that display.

For a description of the fields, see [Contacts details](#).

5. Select the contact you want to associate with the asset.
6. Select **Select**.

Remove 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. On the **Assets** page, find and open the asset record you want to update.
2. Select the **Contact** tab.
3. Select the contact you want to remove from the asset.
4. Select **Delete**.

Asset Calendar

The asset calendar is located on the **Calendar** tab of the **Assets** page. This calendar provides a quick view to the following types of events that users performed on an asset:

- Records
- Condition assessments
- Preventative maintenance (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.

Type	Events Shown in Calendar	Event Time	Remark
Record	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).
Condition assessment	Schedule and inspection arrangement of the condition assessments	Schedule date Inspection date	
PM schedule	Schedule arrangement in the PM Schedule, preconditioned that the Trigger by option of the PM schedule is Scheduled date	Next schedule date	
Rating	Entry of rating scores for the asset	Rating date	
Resource scheduling	Assignment of the asset to work orders or condition assessments as a resource, preconditioned that the asset is flagged as a resource	Assignment date	

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.

To work on an asset calendar

1. On the **Assets** page, find and open the asset you want to work with.
2. Select the **Calendar** tab.



Note: The records that you associated with the asset display in the calendar by default.

3. To change the view of the calendar, do any of the following:
 - Select the **Day**, **Week**, or **Month** button on the upper right of the calendar, depending on what mode you want to view.
 - Select 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.
 - Select 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.
 - Select the calendar icon to quickly locate a date.
 - In the weekly mode, select a date link to view the calendar of the date.
 - In the monthly mode, select a week link to view the calendar of the week, or select a date link to view the calendar of the date.
4. To configure what asset event types display in the calendar:

- If the square box next to a type has no color in it, the type is currently not on display in the calendar. Select the type or select the square box to select the type.
 - If the square box next to a type displays in a color, the type is already on display in the calendar. Select the square box to remove the type.
 - Select **Show** to enable the display of the selected asset event types in the calendar.
5. Hover over an asset event in the calendar to view the identification and time information about the event. For more information, see [Asset Calendar](#) .

**Note:** With record entries and condition assessment entries in the calendar, you can select 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.

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.

**Important:** Because your Civic Platform installation has been configured to meet your agency’s specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Asset fields

The table below lists and defines the default fields available on the **Assets** page.

Field	Description
Asset Group	The asset group. Example: component, line or node.
Asset ID	The number used to identify the asset.
Asset Size	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.
Asset Type	The type of asset. Note: 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.

Field	Description
Comments	Enter any comments associated with the asset.
Current Value	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 Asset depreciation formulas .
Date of Service	The date the asset was initially placed into service.
Dependent Parent	Indicates whether the parent asset is dependent on this asset. This action will update the parent asset status whenever this asset status changes.
Description	The description of the asset.
Depreciation Amount	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 Asset depreciation formulas .
Depreciation End Date	The end date for the asset depreciation calculation. This field is used in the asset depreciation calculation. Refer to Asset depreciation formulas .
Depreciation Value	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 Asset depreciation formulas .
Depreciation Start Date	The start date for the asset depreciation calculation. This field is used in the asset depreciation calculation. Refer to Asset depreciation formulas .
Parent Asset	The asset is linked to a parent asset, the parent asset ID appears in this field. For more information on asset relationships, see Linked assets .
Salvage Value	The residual value of the asset at the end of its useful life. This field is used in the asset depreciation calculation. Refer to Asset depreciation formulas .
Size Unit	The unit of measure from this drop-down menu that corresponds to the value entered in the Asset size field. Your agency administrator determines which units are available in this menu.
Start Value	The beginning value or purchase price of the asset. This field is used in the asset depreciation calculation. Refer to Asset depreciation formulas .
Status	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 deprecation calculation of the asset.
Status Date	The date the asset status changed.
Sub Total for Condition Assessments	This read-only field displays the sub-total costs from all the condition assessments on the asset.
Sub Total for Work Orders	This read-only field displays the sub-total costs that you distributed to the asset from work orders.

Field	Description
Total Cost LTD	This read-only field displays the total amount of the Sub total for condition assessments , and Sub total for work orders .
Useful Life	The number of years the asset is expected to be used. This field is used in the asset depreciation calculation. Refer to Asset depreciation formulas .

Part inventory fields

The following table lists and defines the fields that may be available on the Parts Inventory page.

Field	Description
Calculate Type	The calculation type. This type is used to calculate the average cost of the part Choices include: 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. 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.
Comments	Comments associated with the part.
Maximum Quantity	The maximum quantity of the part.
Minimum Quantity	The minimum quantity on hand for the part for all locations.
Part Brand	The brand of the part. For example, Valvoline is a brand of motor oil.
Part Description	The description of the part.
Part Number	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.
Part Status	The status of the part.
Part Type	The type of part. Example: Fittings, Fleet, Materials.
Reorder Due	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.
Reorder	The quantity needed when the part is reordered.

Field	Description
Quantity	
Taxable	The status of whether or not the part is taxable.
Total Supply	The total quantity on hand for the part displays in this field. It is a read-only field and will updated based on part inventory.
Unit of Measure	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.

Field	Description
Dependency	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 Linked assets .
Quick Query	Choose a field to determine which child assets to display. Only the child assets that match the selected field will display.
Class Type	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.
Asset Group	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.
Asset ID	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.
Attribute	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.

Field	Description
Attribute Value	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** page.

Field	Description
Comments	Any comments related to the asset usage or reading.
Reading	The current usage reading number.
Reading by Department	The department responsible for completing the reading for the asset. Select the Selection icon to choose a department.
Reading by Staff	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 Current User 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.
Reading Date	The date of the usage reading.
Reading Unit	The unit of measure related to the current usage reading. Use the list to select a reading unit.
Unit Type	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.
Work Order	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.

Field	Description
Action by Dept	The department that identified the critical notice.

Field	Description
Action by User	The user that identified the critical notice.
Applied by Department	The department of the user creating the condition.
Applied by User	The user creating the condition. The current user link can be selected to automatically populate the field with the current user.
Applied Date	The date the condition or critical notice should be applied.
Comment	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.
Condition Name	The name used to identify the condition or notice. This field will display as read only when in edit mode.
Effective Date	The date the condition or critical notice takes effect.
Expiration Date	The date the condition or critical notice is to be expired. The prompt message will display 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.
Severity	The severity of the condition or notice. The Lock, Hold, and Notice severity options 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 severity options.
Status	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.
Type	The type of condition or critical notice.

Asset cost rates definitions

The following table lists and defines available asset cost rates.

Field	Description
Active Date	The date when the cost rate becomes effective.
Default Cost Factor	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.
Expiration Date	The date when the cost rate expires.
Fixed Rate	The fixed cost amount to be used for the cost item. It will be identified as hours, dollars, etc. using the units of measure.
ID	Auto-generated cost rate ID.
Record Status	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.
Unit Rate	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.
Updated Date	Read-only field in the cost rates list. It shows the date when the cost rate is last updated.
Updated By	Read-only field in the cost rates list. It shows the user who last updated the cost rate.

Asset condition assessments

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.



Example: Agency vehicles might require safety and emissions inspections yearly, while water lines might require an assessment every three months.



Note: Asset condition assessments are only available when configured by your agency. If you have specific questions about how asset condition assessments are configured for your agency, contact your agency administrator or help desk.

Your agency may 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.



Example: The inspector 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.

Create an asset condition assessment

You can create asset condition assessment records to meet the requirements of your agency.

To create an asset condition assessment

1. On the **Asset condition assessment** page, select **New**.
2. From the **Condition assessment** list, make the desired selection.
3. Select **Submit**.
4. Enter the search criteria needed to locate the desired asset, and then select **Submit**.
5. Select the asset you want to add to the condition assessment, and then select **Select**.
6. Complete the required fields and others as needed. See [Asset condition assessment detail fields](#) for field definitions.
7. Select **Submit**.

View and edit an asset condition assessment

You can modify assessment records as needed. For example, you can attach documents and images (see [Manage asset condition assessment attachments](#)), link work orders to the assessment (see [Associate a work order to an asset condition assessment](#)), and reschedule the assessment (see [Reschedule an asset condition assessment](#)).

1. From the **Assets** page, find and open the desired asset record.
2. Select the **Condition assessment** tab and open the desired condition assessment.
3. Modify the fields as needed. See [Asset condition assessment detail fields](#) for field definitions.



Note: You cannot edit the following fields: **Asset ID**, **Asset group**, **Asset type**, **Class type**, and **Condition assessment**.

4. Select **Save**.

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.



Example: You can add the same **Schedule status** to all the records using the **Group update** function.



Note: This feature is enabled by your agency administrator. If you need access to this feature, contact your agency administrator.

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Asset Condition Assessment

Menu Search New Delete Help

- Customize Content
- CSV Export
- Expand List
- Edit View
- My Filters
- Group Update**
- Print Page

ID	Condition Assessment	Asset Group
	FIRE HYDR...	Parks
	CCTV	Sewer
☐ 181600	CCTV	Sewer
☐ 181599	CCTV	Sewer
☐ 181598	CCTV	Sewer
☐ 181597	CCTV	Sewer
☐ 181596	CCTV	Sewer

To perform a group update on condition assessments

1. From the **Asset Condition Assessment** page, select the condition assessment that contains the details you want to apply to other conditions assessments.
2. In the details area, update any details as appropriate and select **Save**.
3. Select the other condition assessments that you want to update with the same details.
4. Hover over **Menu** and select **Group update**.
5. Edit the condition assessments with the new values.
6. Select **Save**.

Reschedule an asset condition assessment

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. From the **Assets** page, find and open the desired asset record.
2. Select the **Condition assessment** tab and open the desired condition assessment.
3. Modify the date and time fields as needed.
4. (Optional) Update other fields as needed.
5. Select **Save**.

Create or edit asset condition assessment observations

An inspector can record their observations about the condition of an assessment and update their observations later if needed.

Create an asset condition assessment observation

Most agencies predefine 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.



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 predefined 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 [Manage 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. From the **Asset condition assessment** page, find and open the assessment record.
- 2. Select the **Observation** tab.

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)
☐	48	8			56	11/09/2010
☐	29	78			14	11/09/2010

- 3. Select **Add**.
- 4. Complete the fields in the row with available data.
- 5. Select **Save**.

View and edit an asset condition assessment observation

You view and modify observation data as needed.

To edit an asset condition assessment observation

- 1. From the **Asset condition assessment** page, find and open the assessment record.
- 2. Select the **Observation** tab.
- 3. Modify the observation fields as needed.
- 4. Select **Save**.

Manage asset condition assessment attachments

You can upload images and documents in support of your assessment findings and remove any that are no longer relevant.

Upload an asset condition assessment attachment

During an asset condition assessment, the inspector may take photos or create a diagram with detailed condition information. These items can be uploaded and attached to the Civic Platform assessment record.

To upload an attachment

1. From the **Assets** page, find and open the desired asset record.
2. Select the **Condition assessment** tab and open the desired condition assessment.
3. Select the **Documents** tab.
4. Select **New**.
5. Complete the required fields and others as needed. See [Asset condition assessment details](#) for field definitions.
6. Select **Add**, and then select the document you want to upload. Repeat this step for each additional document you want to upload.
7. Select **Save**.

Download and view 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. From the **Assets** page, find and open the desired asset record.
2. Select the **Condition assessment** tab and open the desired condition assessment.
3. Select the **Documents** tab.
4. Select the file(s) you want to download, and select **Download**.
5. When prompted, save the file to the desired location.
6. To view the document, open it in the appropriate application.

Delete an asset condition assessment attachment

You can remove attachments 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 select **Delete**, Civic Platform removes the attachment.

To delete an attachment

1. From the **Assets** page, find and open the desired asset record.
2. Select the **Condition assessment** tab and open the desired condition assessment.

3. Select the **Documents** tab.
4. Select the check box next to each attachment you want to delete.
5. Select **Delete**.

View or precalculate 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 page for the condition assessment record.

You can enter ratings manually, independent of any system event.



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 timestamps and saves each rating value for an asset, which provides users with a historical log of past ratings.

View condition assessment ratings

You can view an asset's current rating and other rating details in the Ratings tab on the Asset Condition Assessment page. You can also see whether the current value is a precalculated value or if the current value is a rating triggered by completion of a condition assessment. See [Precalculate a condition assessment rating](#) for information about precalculated 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 [View assets](#).

To view condition assessment ratings

- 1. From the **Asset condition assessment** page, find and open the assessment record.
- 2. Select the **Ratings** tab.

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

Precalculate a condition assessment rating

You can precalculate a rating value for a condition assessment without completing the condition assessment, which allows you to get a current view of an asset’s condition.

To precalculate a condition assessment rating

- 1. From the **Asset condition assessment** page, find and open the assessment record.
- 2. Select the **Ratings** tab of the new condition assessment.
- 3. Select **Pre-calc**.

Asset condition assessment and 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.

Create a work order for an asset condition assessment

Creating a work order is the first step towards resolving issues exposed by an asset condition assessment.

To create a new work order for an asset condition assessment

- 1. From the **Asset condition assessment** page, find and open the desired condition assessment.
- 2. Select the **Work order** tab.
- 3. Select **New**.
- 4. Do one of the following:

- From the **Work order template** list, select the desired template.
- From the record type list, select a record type, and then select **Create record**.



Note: To locate a record type quickly, you can type part or all of a record type name in the **Search record type** field. You can also select a module from the **Select module** list to display only record types for that module.

If you have questions about which record type to select, contact your agency administrator.

5. Complete the required fields and others as needed.
6. Select **Submit**.

Associate 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. From the **Asset condition assessment** page, find and open the desired condition assessment.
2. Select the **Work order** tab.
3. Select **Look Up**.
4. Enter the search criteria needed to locate the desired work order(s), and then select **Submit**.
5. Select each work order you want to link to the asset condition assessment.
6. Select **Select**.

Add, edit, and delete asset 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.

Look 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. From the **Asset condition assessment** page, find and open the condition assessment to which to add assignments or costs.
2. Select 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.
3. Select **Look up > Look up by cost item**.
4. Choose an option from the **Cost type** list and/or complete the fields associated with the cost item for which you are searching.
5. Select **Submit**.
6. Do one of the following:

- **Add a single cost item:**

1. Select the cost item you want to associate with the condition assessment
2. Complete the fields with available data (see [Asset condition assessment costing fields](#) for field definitions).



Note: If you are assigning an asset or human resource to the condition assessment, you can select the asset or human resource, and then select **Resource calendar** to view the availability of the asset or human resource.

or

- **Add multiple cost items:**

1. 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.
2. Select the next cost item that you want to associate with the condition assessment.



Note: 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** check box.



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**. The check box next to the third item is selected.

All of the item two data values except for **Quantity** copy to the item three fields.

3. 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 one or more of the values in the fields for the new cost item.

7. Select **Select**.

Look 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 **Asset condition assessment** page applies the same cost group management functionality as the **Assignments and costs** tab in the **Work orders** page. For information on cost group management, see [Work order assignments and costs](#).

To look up cost groups and add assignments or costs

1. From the **Asset condition assessment** page, find and open the condition assessment to which to add assignments or costs.
2. Select the **Assignments and costs** tab.
3. Select **Look up > Look up by cost group**.
4. Choose the cost group name you want to use and select **Submit**.



Note: 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.

5. 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:
 1. 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.



Note: If you are assigning assets or human resources to the condition assessment, you can select the assets or human resources, and then select **Resource calendar** to view the availability of the assets or human resources in a calendar. The calendar displays in date range view.

2. Select the next cost item in the group that you want to associate with the condition assessment.



Note: 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** check box.



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**. The check box next to the third item is selected.
All of the item two data values except for **Quantity** copy to the item three fields.

3. 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.
6. Verify the auto-populated values and make any changes as needed.
7. Select **Select**.

Add 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.

To add a new assignment or cost

1. From the **Asset condition assessment** page, find and open the condition assessment to which to add assignments or costs.
2. Select the **Assignments and costs** tab.
3. Select **New**.
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.



Note: If you are assigning an asset or human resource to the condition assessment, you can select 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** page. For more information about the calendar, see [Asset Calendar](#).

6. Select **Submit**.

Edit 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 agency administrator.

To edit condition assessment assignments and costs

1. From the **Asset condition assessment** page, find and open the condition assessment.
2. Select the **Assignments and costs** tab.
3. Open the assignment or cost item you want to view or edit.
4. Make changes as needed. See [Asset condition assessment costing fields](#) for field definitions
5. Select **Submit**.

Delete 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. From the **Asset condition assessment** page, find and open the condition assessment.
2. Select the **Assignments and costs** tab.
3. Select the check box next to the cost item(s) you want to remove.
4. Select **Delete**.

Convert 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. From the **Asset condition assessment** page, find and open the condition assessment.
2. Select the **Assignments and costs** tab.
3. Select each assignment item that you want to convert to costs.



Note: You can select multiple assignments. However, if an assignment is converted to cost before, you cannot do it again.

4. Select **Convert to cost**.



Note: 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 select **Submit**.

Asset condition assessment details

The following tables list and define the default fields available in the asset condition assessment user interfaces.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Asset condition assessment detail fields

The following table lists and defines fields that may be available as you work with asset condition assessments.

Field	Description
Read-only fields for reviewing only:	
Asset Group	The asset group. For example: Water or Street. An Asset Group is an agency-defined collection of objects the agency owns or maintains.
Asset ID	The numbering sequence used to identify the asset. An Asset ID is the unique identification for an asset.
Asset Type	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.
Class Type	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.
Condition Assessment	The type of condition assessment.
Activated fields available for editing:	
Comments	General comments.
Department	The department responsible for the assessment. The selection may change the names listed in the Inspector menu.
Inspection Date Inspection Time	The inspection start (from) and end (to) dates from the calendar icon. The time of the inspection.
Inspector	The name of the inspector responsible for the assessment.
Schedule Date Schedule	The start (from) and end (to) dates from the calendar icon: Select the Schedule time from the list.

Field	Description
Time	
Status	The status of the condition assessment: Completed or Scheduled.
Time Spent (Hours)	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.

Field	Description
Document Group/Category	A document group that relates to the asset condition assessment ID. The selection that you make affects the options in the adjacent category menu. For example, the types of document categories might be Photos or Engineering drawings.
Document Name	A name for the document attachment. For example, Image of 1 of 3 Pavement Section.
Description	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.
Source (or EDMS Name)	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.
File Name [Browse]	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.

Field	Description
Cost Account	The cost account where the units should be added or subtracted from when associating with a condition assessment.
Cost ID	The identification number populates automatically when you click Submit.
Cost Item	The name for the cost item.
Cost Type	This is the type of cost. For example, contract, employee, materials.

Field	Description
Current Asset Usage	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.
Date	The date when the costing is done.
Description	The description for the cost item.
End Time	The end time of the assignment or cost item usage. Select All day event if applicable.
Fixed Rate	The fixed cost rate to be used for the cost item.
Quantity	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. 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.
Record Status	Read-only field. It indicates whether the cost item record is active or inactive in the administrator portlet.
Start Time	The start time of the assignment or cost item usage. Mark "All Day Event" if applicable.
Time Accounting Group	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.
Time Accounting Type	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.
Time Elapsed	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.
Total Cost	Automatically calculated according to the formula below. If there are no cost factors for the cost items: $\text{Total Cost} = \text{Fixed Rate} + \text{Quantity} * \text{Unit Rate} * \text{Default Cost Factor}$ If there are multiple cost factors for the cost items: $\text{Total Cost} = \text{Fixed Rate} + \text{Unit Rate} * (\text{Cost Factor \#1} * \text{Quantity \#1} + \text{Cost Factor \#2} * \text{Quantity \#2} + \dots + \text{Cost Factor \#n} * \text{Quantity \#n})$
Type	Select the type from assignment or cost.
Unit Rate	Enter the unit cost rate to be used for the cost item.
Unit of Measure	Use the list to select the unit of measure for the cost item.

Field	Description
Updated Date	Read-only field. It indicates when the cost item is last updated in the administrator portlet.
Updated By	Read-only field. It indicates the user account that last updated the cost item in the administrator portlet.
Usage/Time Tracking	This field contains three parts: Time Accounting Group , Time Accounting Type , and Time Elapsed .

Attachments

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 \(EDR\)](#) for more information.

Attach files

You can attach one or more documents to a record by uploading them from your device. You can also link to an existing attachment using the **Look up** option.



Note: You agency may have set limits on file size and/or file type. The **Batch upload** window lists these limits at the top as you add a new attachment.

To attach one file

1. Find and open the record to which you want to attach a document.
2. Select the **Documents** tab.
3. Select **New**.
4. Complete the required fields and others as needed.
5. Select **Add**.
6. Select the file you want to attach.
7. Select **Open**.
8. Select **Save**.

To attach multiple files

1. Find and open the record to which you want to attach the documents.
2. Select the **Documents** tab.
3. Select **New**.

4. If you want certain options to apply to all documents you will attach, select or enter those options in the appropriate fields.



Example: You plan to attach five documents that belong to the same document group, so you select that document group from the **Document group/category** list.

5. Select **Add**.
6. Select the files you want to attach. The files must be in the same folder on your device.
7. Select **Open**.
8. Under **Apply definitions to selected**, complete the required fields and others as needed.



Note: To apply the same options to multiple documents:

1. Select the desired options in the fields at the top of the page.
2. Under **Apply definitions to selected**, select the attachments to which you want to apply the options.
3. Select **Apply definitions to selected**.

9. Select **Save**.

To link to an existing attachment

1. Find and open the record to which you want to attach the documents.
2. Select the **Documents** tab.
3. Select **Look up**.
4. Select the check box next to the attachment and select **Select**.

Access 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 and open it in the software application that was used to create it. For example, you would use Acrobat Reader to open a PDF.

To access an attachment

1. From a list page, find and open the record with the attachment you want.
2. Select the **Documents** tab.



Optionally, when accessing the attachments of an application or a service request record, you can select the type of attachments list you want to view. There are two options:



- **Record attachments**- Select this option to view the files directly attached to the current record. This is the default option.
- **People attachments** - Select 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 [Look up people attachments to associate with records](#) and [Associate record attachments with people](#).

3. Select the **File name** link for the attachment you want to view. For the attachment fields, see [Attachment details](#).
4. To download the file, open the **Actions** menu for the desired attachment by selecting the down arrow, and then select **Download**.



- To download multiple documents, select the check box next to the documents and select **Manage documents > Download**.
- Your agency administrator must grant **Upload** and **Download** permission to enable multiple document downloads. Contact your agency administrator with questions.

5. To print multiple documents, select the check box next to the documents and select **Manage documents > Print**.



The **Print** option is only available if your agency administrator has configured that option. Contact your agency administrator with questions.

Look up people attachments to associate with records

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. From the Record page, 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, find and open the record, and select the **Documents** tab.
2. Select **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.



Civic Platform checks your agency's EDMS security settings and only displays the documents that you have permission to view.

3. Select the check box next to the documents you want to add to the record, and select **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.

4. 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.

Associate record attachments with people

When you upload a document to a record, you can attach the document to the contact or licensed professional associated with the current record, for the convenience of reusing the same document in the future records.

To associate a record attachment to people in the application intake form

1. 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 select **Add**.
4. Select 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** 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. Complete the remaining record creation steps.

To associate a record attachment to people

1. From the **Records** page, find and open the desired record.
2. Select the **Documents** tab.
3. Select the document(s) you want to attach to people.
4. Hover over **Manage documents**, 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 displays an error message.

5. Select the contact or licensed professional to which you want to attach the selected document(s), and select **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, and template fields. You can also assign virtual folders to the document.

For information on ACA Permissions, see [Define ACA permissions for a document](#).

Access attachments on the map dashboard

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. From the Map dashboard, find 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.

2. Select **Actions** > **Show document**.

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 select these parcel numbers to view the attachments associated with the historical parcels.

Define 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 [Access an attachment](#).
- 2. Select the check box next to the document.
- 3. Select **Manage documents > ACA permission**.

 **Note:** You can also select **Change** under the **ACA permissions** heading on the **Doc info** tab of the attached document.

- 4. Set the following options as desired:

Option	Description
Set Title Viewable Permission	Select Yes, then select the public users for whom you want the attached document name to be viewable in Citizen Access. Select 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	Select Yes, then select the public users for whom you want the attached document to be downloadable in Citizen Access. Select No to use existing permissions based on the document type of the attached document.
Set Deletable Permission	Select Yes, then select the public users for whom you want the attached document to be deletable in Citizen Access. Select No to use existing permissions based on the document type of the attached document.

 **Note:** 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.

5. To 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.

6. Select **Submit**.

View an attachment

When you want to look at an attachment but do not need to modify it, use the **View** option.

To view an attachment

1. Open a record and select the **Documents** tab.
2. Select the attachment file name that you want to view.
3. Select **View**.

Download attachments

You can download record attachments to your computer as needed. When 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, you can reattach the file to the record in Civic Platform. See [Attach files](#) for more information.

To download an attachment

1. Open a record and select the **Documents** tab.
2. Select **Actions > Download** in the row of the document to download.
3. To download multiple documents, select the check box next to the documents and select **Manage Documents > Download**.



The Civic Platform administrator must grant **Upload** and **Download** permissions to enable multiple document downloads.

Add or remove a display image from a record

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. 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.

Add 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.

To add a display image

1. Open a record and select the **Documents** tab.
2. Choose one of the following:
 - Add an image attachment to the record. For instructions, see [Attach files](#).
 - or
 - Choose an existing image from the document list page.
3. Select the attachment you want to set as the display image.
4. Select **Manage documents** > **Set display image**.



Note: The image file is set as the display image for the current record, and Accela Civic Platform displays a **Y** in the **Display image** column.

Remove a display image

You can change or remove the display image for a record at anytime. You can also replace the display image by adding a new one.

To remove a display image

1. From a record, select the **Documents** tab.
2. Select the check box next to the current display image.



Note: The current display image is the attachment with a **Y** in the **Display image** column.

3. Select **Clear display image**.



Note: Civic Platform displays **N** in the **Display image** column, indicating the display image was removed from the current record.

View 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 select the **Info** button in the document list page.

To view attachment information

1. Open a record and select the **Documents** tab.
2. Identify the document you want to view/edit and select the check box.
3. Do one of the following:
 - Select the **Info** button on the toolbar.
 - or
 - Select **View doc info** from the **Action** menu for the desired document.

Delete an attachment

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. Open a record and select the **Documents** tab.
2. Select the check box next to the attachment(s) you want to delete.
3. Select **Delete**.
4. Select **Yes** to confirm the deletion.

Attachment details

The following table lists and defines fields that may be available as you work with attachments.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Field	Description
ACA Permission	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.
Alternate ID	This read-only field displays the Alternate ID of the record that the document is uploaded to.
Department	This is the department that is responsible for reviewing the document or who currently is in possession of it.
Display Image	This is a display image, or icon, you can apply to a document. See Add or remove a display image from a record .
Document Description	A brief description of the document.
Document Group/Category	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.
Document Name	This is the title for the document.
Document Status	This read-only field displays the status of the document.
Document Status Date	This read-only field displays the date the document status was last updated.
EDMS Name	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.
Entity Type	This read-only field displays the original entity to which the document is uploaded; for example, record, inspection, or professional.
Entity	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.
File Name	This read-only field shows name of the file as it displays in the source location.
Inspection	This read-only field displays the inspection type if the document is attached to an inspection.
Modified By	This read-only field shows the user account that last modified the document.
Modified Date	This read-only field shows when the document was last updated in the record.
Record Type Alias	This read-only field displays the record type alias, if any, of the record that the document is uploaded to.

Field	Description
Size	This read-only field shows the file size of the document.
Type	This read-only field displays the file format of the document; for example, image/JPEG or PDF.
Uploaded By	This read-only field shows when the document was uploaded to the record.
User Email	One or multiple email addresses that you want associated with the attachment. Separate multiple addresses by a comma.
Virtual Folders	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

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](#)

Access audit logs

Use the **View log** button to access audit logs throughout Civic Platform. If the **View log** button appears in a record, you access the audit log for the current record only. If the **View Log** button is in a list page, you access an audit log for all records of that type.

Select the **View log** button to open the audit log. However, on some pages, multiple audit logs may be accessible. In these instances, the **View Log** button becomes a menu of available logs from which you can choose.



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.

To access an audit log

1. Open a list page or record 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 page. If you launch an audit log from a detail page, it contains historical data for the current record only. If you launch the audit log from a list page, 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, select the button.
 - or
 - If **View log** is a menu list button, select the name of the log you want to launch from the **View log** list.
3. Specify an audit type, if options are available.
4. Apply filter options as needed to display the data you want to see. See [Filter 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.

Available Audit Log/Audit Log Types

Audit Log/Audit Log Type	Where to access	Notes
App Specific Info Audit Log	Record list page > View Log > Record Details Log > App Specific Info audit type Record detail page > Record tab > View Log > App Specific Info audit type	An additional filter option, Subgroup, is available for this log.
App Specific Info Tables Audit Log	Record list page > View Log > Record Details Log > App Specific Info Tables audit type Record detail page > Record tab > View Log > App Specific Info Tables audit type	An additional filter option, Subgroup, is available for this log.
Asset Audit Log	Asset list page > View Log button	Two additional filter options, Condition Group and Condition Type, are available for this log.
Condition Audit Log	Record list page > View Log > Record Details Log > Record Condition audit type Record detail page > Record tab > View Log > Record Condition audit type Record detail page > Conditions tab > View Log Record detail page > Conditions of Approval tab > View Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
Contact Audit Log	Reference Contacts list page > View Log > Contact Log > Contact audit type Record details page > Contacts tab > View Log > Contact audit type	An additional filter option, ALT ID, is available for the record-specific contact audit log (Record details page > Contacts tab). The Field and Value filter options are not available for this log.

Audit Log/Audit Log Type	Where to access	Notes
Contact Address Audit Log	Reference Contacts list page > View Log > Contact Log > Contact Address audit type	The Field and Value filter options are not available for this log.
Contact Also Known As Audit Log	Reference Contacts list page > View Log > Contact Log > Contact Also Known As audit type	The Field and Value filter options are not available for this log.
Contact Condition Log	Reference Contacts list page > View Log > Contact Condition Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
Contact Merge Log - 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 page > View Log > Contact Log > Contact Merge audit type	The Field and Value filter options are not available for this log.
Contact Relationship Audit Log	Reference Contacts list page > View Log > Contact Log > Contact Relationship audit type	The Field and Value filter options are not available for this log.
Deleted Record Log - Use this audit log to view a list of deleted records.	Record list page > View Log > Deleted Record Log	Log Date is the only filter option.
Document Audit Log	Record list page > View Log > Record Details log > Document audit type. Record detail page > Documents tab > View Log	Three additional filter options, Document group, Document Type, and Action Type, are available for this log.
Examination Audit Log	Record detail page > Examination tab > View Log	
Inspection Audit Log - Use this audit log to view historical inspection data.	Inspection list page > View Log > Inspection Log Record detail page > Inspection tab > View Log > Inspection Log	Log Date is the only filter option.
Checklist Audit Log - Use this audit log to view historical checklist data.	Inspection list page > View Log > Checklist Log Record detail page > Inspection tab > View Log > Checklist Log Record list page > View Log > Record Details Log > Checklist audit type Record detail page > Record tab >	An additional filter option, Checklist, is available for this log.

Audit Log/Audit Log Type	Where to access	Notes
	View Log > Checklist audit type	
Licensed Professional Condition Audit Log	Licensed Professionals list page > View Log	Two additional filter options, Condition Group and Condition Type, are available for this log.
Record Status History Audit Log	Record detail page > Application History tab > View Log button	The only filter option available for this audit log is Log Date.
Record Details Log	Record list page > View Log > Record Details Log > Record audit type Record detail page > Record tab > View Log > Record audit type	n/a
Workflow History Audit Log - Use this audit log to view the workflows deleted by the Delete & Assign Workflow action.	Record detail page > Workflow History tab > View Log > Deleted Workflow audit type	The Field and Value filter options are not available for this log.
Workflow Task Audit Log - 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 page > 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.
Workflow Change Audit Log - 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 page.	Record detail page > Workflow History tab > View Log > Workflow Change audit type	The Field and Value filter options are not available for this log.
Workflow Task Assignment Audit Log - Use this audit log to view the following logs: Task assignment, task release, and task claim in the Workflow tab of the Record page, and the Workflow Tasks tab of the My Tasks page- Task assignment in the Assign Task administration page.	Record detail page > Workflow History tab > View Log > Workflow Task Assignment audit type	The Field and Value filter options are not available for this log.

Filter audit log data

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 in which you want to work. See [Access audit logs](#) for more information.
- 2. If available, select an audit type from the **Audit type** filter.
- 3. Use the additional filter fields as necessary. See [Audit Log Buttons and Filter Options](#) for a list of filter options and filter definitions.
- 4. Select **Filter**.

Civic Platform updates the data record list to reflect your filter settings.

**Note:** To restore the original view, clear the filter fields and select the **Filter** button again. You can also close and reopen the audit log window.

Audit Log Buttons and Filter Options

The following table lists the filters and options on the Log Detail.

Button/Filter	Description
ALT ID	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.
Action Type	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.
Audit Type	Select the audit type you want to view. Which types are available varies, depending on where you launched the audit log window. See Available audit logs for a list of audit logs and associated audit types.
Condition Group	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.
Condition Type	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.
Document Group	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.

Button/Filter	Description
Document Type	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.
Entity ID	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.
Field	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.
Filter button	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.
Checklist	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.
Log Date/Time	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.
Operator	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.
Subgroup	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.
Value	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

The **Receipt print audit** page enables you to track receipt printing. It displays details about who has printed a receipt from a record.

Calendars

Civic Platform provides four different calendar types:

- **Inspection**

You can use inspection calendars to schedule, reschedule, cancel, and request inspections. You can also 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 allows you to schedule any special circumstance inspections after an application is submitted.

- **Meeting**

You can use meeting calendars to manage meeting logistics. Access meeting calendars to review and update meeting details, including the meeting agenda, location, contacts, and results.

- **Agency holiday**

You can use agency holiday calendars and to block out holidays and prevent users from scheduling inspections or meetings on those days.

- **User**

You can use user calendars to show your availability to others for scheduling inspections or meetings.

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.

The calendar page overview

The Calendar page consists of three main parts:

Navigation tree section - Use this section 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 select the plus (+) or minus (-) sign next to parent categories to find calendars.

Calendar name section - After you select a calendar in the navigation tree page, the results display in this page. Civic Platform sorts calendar data into primary tabs that you can select 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 select 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 page - When you select a calendar item, information related to the selected calendar displays. The tabs and buttons available for you to use vary by calendar type. The Calendar Detail page 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.

View all calendar items in one calendar view

You can view all calendars and associated items in one calendar view.

To view the master calendar

- 1. From the **Calendar** page, select a calendar in the calendar navigation tree.
- 2. Select the calendar display tab (for example, **Daily**, **Weekly**, or **Monthly**).
- 3. Select the **Show all items for calendars** check box at the top of the calendar.

or

Select the calendar items to view from the **Show** menu at the top of the calendar.

 **Note:** Some calendars have multiple options for showing calendar items specific to that calendar which are configured by your agency. Contact your agency administrator or help desk for more information.

Inspection calendars

Inspection calendars allow you to schedule, view, reschedule, cancel, assign, and update inspections. The following sections explain different aspects of inspection calendars.

Inspection calendar tabs

You can use the primary tabs for an inspection calendar on the **Calendar** list page to view and modify calendar details. The inspection calendar tabs are located on each individual inspection calendar in the **Calendar** page. To access these tabs, open the **Calendar** page and select the calendar you want to view.

Some of the inspection calendar tabs that may be available are:

Tab	Description
Schedule	The Schedule tab displays the inspection calendar for the current date. You can use the scroll bar beneath the calendar to view future days or past days. To see 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 page. You can edit inspection detail, checklists, and conditions in the Edit Inspection page. For more information, see Inspection calendars.

Tab	Description
Inspections	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 page after Civic Platform displays them. For more information about the Edit Inspection portlet, see Inspection calendars .
Daily, weekly, monthly	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 list.

The manage inspections menu

The **Manage inspection** menu appears on the menu bar of the **Inspections** tab and provides you with a list of actions that you can perform on one or more inspections. You can access this menu when you open the Calendar page, select the calendar you want to view, and select the **Inspections** tab.

Some of the possible options on the **Manage inspection** menu are:

Option	Description
Schedule inspections	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.
Reschedule inspections	You can reschedule both scheduled and pending inspections as needed to accommodate inspector schedules and inspector workloads.  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.
Result inspections	After an inspection is complete, you can enter the inspection results from the Inspection tab. You can enter inspection results at any time, regardless of an inspection's status.

Option	Description
	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.
Cancel inspections	You can cancel a scheduled or pending inspection as necessary. Canceled inspections remain in the list page and remain associated with the record, which enables you to reschedule the inspection at a later date. If you do not want a canceled inspection to display in the list page, you can delete it.

Delete an inspection

You can delete an inspection from an application. When you delete an inspection, Civic Platform permanently removes the inspection record. Canceling an inspection allows you to remove an inspection, but it does not remove the inspection from Civic Platform.

To delete an inspection, select the check box next to the inspection to delete and select **Delete**.

Modify a scheduled, rescheduled, or pending inspection

You can modify inspection details for inspections with a status of scheduled, rescheduled, or pending. This allows you to 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. Open the Calendar page and select the calendar you want to view.
- 2. Select the **Inspections** tab.
- 3. Select the inspection(s) you want to schedule, reschedule, or cancel.
- 4. Select the action from the **Manage inspection** button from the toolbar.
- 5. Select the inspection type in the inspection list.
- 6. Modify the necessary inspection details. For a complete list of inspection detail fields, see [Calendar \(and related\) fields](#).
- 7. Select **Submit**.

Based on the changes you make, Civic Platform displays a confirmation message indicating the inspection status.

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 Mobile 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 page 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.



You can schedule, reschedule, or cancel pending inspections. When you cancel an inspection, Civic Platform removes it from the application.

Edit inspection page

The Edit Inspection page includes the secondary tabs and related data that display in the Inspection Calendar Detail page. You access this page by selecting any inspection listed on the Inspection Calendar List page. You can use the Edit Inspection page and secondary tabs to update inspection information, including inspection details, checklists, conditions, and related documents.

You can update all the fields associated with scheduling an inspection in the Edit Inspection page. 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 page

1. Open the **Calendar** page and open the calendar you want to view.
2. Select the **Inspections** tab.
3. Select a view from the **Show** list menu.

4. Open the inspection.
5. Edit the desired inspection fields. For more information on inspection fields, see [Calendar \(and related\) fields](#).
6. Select **Submit**.

Copy 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** page and open the calendar you want to view.
2. Select the **Inspections** tab.
3. Select a view from the **Show** list menu.
4. Select the **Inspection type** link for the application to which you want to copy an inspection.
5. Select **Select record to copy from**.
6. Search for the record you want to copy the inspection from and select that inspection.
7. Select **Submit**.
8. Verify that the **Record type**, **Department**, **Inspector**, **Inspection type**, and **Scheduled date** fields are complete. For more information on these fields, see [Calendar \(and related\) fields](#).
9. Select **Save**.

Inspections checklists

You can view and you can edit inspection checklists using the **Checklists** tab from a specific inspection. For more information on using checklists with inspections, see [Checklists and route sheets](#).

To view an inspection checklist

1. Navigate to the **Calendar** page and open the calendar you want to view.
2. Select the **Inspections** tab.
3. Select a view from the **Show** list menu.
4. Select the desired inspection.
5. Select the **Checklist** tab.

Inspections conditions

You can view and apply inspection conditions using the Conditions secondary tab. For more information on how conditions relate to inspections, see [Apply, update, or view conditions of approval](#).

To view inspection conditions

1. Navigate to the **Calendar** page and open the calendar you want to view.
2. Select the **Inspections** tab.
3. Select a view from the **Show** list menu.
4. Open the desired inspection.
5. Select the **Conditions** tab.

Inspections 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 pages where a Civic Platform user may view details about the inspection, including the **Building** and **Calendar** pages.

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

Meeting Calendars

From the **Calendar** page, you can view, schedule, and modify meetings.

You can also create, review and modify meeting agendas and other meeting details. See [Meeting agendas and attendees](#) for more information.

View and find scheduled calendar items

You can navigate to inspections, meetings, and user events from the **Calendar** page. You can also find scheduled meetings from the **Record** page and the **My tasks** page.

To view or find a scheduled calendar item

- View the scheduled item from the **Calendar** page.
 1. On the **Calendar** page, expand the calendar categories on the left side panel until you find the calendar for which you want to view scheduled items



Note: You can navigate meeting calendars by type, name, permission, inspection type, or department.

- View or find meetings from the **My tasks** page.
 1. From the **My tasks** page, select the **Meetings** tab.
 2. Open the meeting you want to view or use **Search** to find a meeting.
- View meetings on the **Record** page
 1. From the **Record** page, open the record for which you want to access the associated meetings.
 2. Select the **Calendar** tab.

Schedule a meeting

You can schedule a new meeting from the **Calendar** page, the **Record** page, or the **My tasks** page. 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** page.
 1. Find the calendar for which you want to schedule an item ([View and find scheduled calendar items](#)).
 2. Select **New**.
- Schedule a meeting from the **Record** page.
 1. On the **Record** page, access the record for which you want to schedule a meeting.
 2. Hover over the **Manage meeting** button and select **New meeting**.
- Schedule a new meeting from the **My tasks** page.
 1. On the **My tasks** page, select the **Meetings** tab.
 2. Select **New**.

1. Complete the required fields and others as needed. See [Calendar item details](#).



Note: The fields to complete depend on the calendar type (that is, meeting, agency holiday, user) for which you are scheduling an item.

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.

2. Select **Submit**.

Modify meeting details

You can modify meeting details through the Calendar page, Record page, or My tasks page. For example, you may need to change the meeting date, time, location, or status. If your agency administrator configures meeting notification emails, you can email a meeting change notification to meeting attendees.

To modify meeting details

- Modify meeting details from the **Calendar** page.
 1. Find the calendar item for which you want to modify the schedule details ([View and find scheduled calendar items](#)).
 2. Select the link to the specific calendar item of interest.
- Modify meeting details from the **My tasks** page.
 1. On the **My tasks** page, select the **Meetings** tab.
 2. Select the link for the meeting you want to modify.
- Modify meeting details on the **Record** page.
 1. On the **Record** page, select the record for which you want to modify meeting details.
 2. Select the **Meetings** tab.
 3. Select the link for the meeting you want to modify.
- Modify meeting details, as required ([Calendar item details](#)).
- Select **Submit**.

Schedule or reschedule a meeting from the Record page

To schedule or reschedule meeting from the Record page

1. On the **Record** page, select the record for which you want to schedule or reschedule a meeting.
2. Select the **Meetings** tab.
3. Select the option next to the meeting you want to schedule or reschedule.
4. Hover over the **Manage meeting** button and select **Schedule meeting** or **Reschedule meeting**.
5. Enter the specified parameters.
6. Select **Submit**.
7. Select the option for the meeting you want to schedule or reschedule.
8. Select **Submit**.
9. Modify meeting details as required ([Modify meeting details](#)).

Reject a meeting

To reject a meeting

1. On the **My tasks** page, select the **Meetings** tab.
2. Select the option for the meeting you want to reject.
3. Select **Reject**.



Note: You can only reject meetings assigned to you. Only internal users can reject a meeting.

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.

Cancel a meeting

You can cancel a meeting associated with a specific record from the **Record** page.

To cancel a meeting

1. On the **Record** page, select the record for which you want to cancel a meeting.
2. Select the **Meetings** tab.
3. Select the meeting you want to cancel.
4. Hover over the **Manage meeting** button and select **Cancel meeting**.
5. Complete the dialog.
6. Select **Submit**.

Delete a meeting or user event

You can delete a scheduled meeting or delete a user event. To cancel an inspection, see [Schedule inspections](#)

To delete a calendar item

1. Find the calendar item for which you want to modify the schedule details ([View and find scheduled calendar items](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific calendar item of interest.



Note: You must remove all agenda items (records) from a meeting calendar item before you can delete it.

4. Select **Delete**.

Meeting agendas and attendees

You can create agendas and manage attendees for meetings scheduled in Civic Platform. With agendas, you can add agenda items and set up voting to identify the most important agenda items.

You can also manage who will attend your meeting, take roll, attach records to your meeting, and send notifications to your attendees.

Add meeting agendas and votes

To set meeting agendas and votes

1. Find the calendar item for which you want to set the agenda and voting ([Meeting agendas and attendees](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific calendar item of interest.
4. Select the **Agenda & vote** tab.
5. If required, add a record to the agenda.
 1. Select **Add**.
 2. Complete the required fields and others as needed. See [Application record fields](#) for field definitions.

3. Select the record(s) you want to add to the agenda.
4. Select **Submit**.
6. If required, remove a record from the agenda.
 1. Select the records you want to remove from the agenda.
 2. Select **Remove**.
 3. Select a reason and enter optional comments.
 4. Select **Submit**.
7. If required, vote on an agenda record.
 1. Select the triangle symbol next to an agenda record to display the voting section.



Note: Only Civic Platform internal users can vote. A responsible internal user can serve as a proxy to vote for external users.

2. If required, remove an attendee from the voting roster.
 1. Select the attendee you want to remove from the voting roster.
 2. Select **Delete voter**.
3. If required, add an attendee to the voting roster.
 1. Select **Add voter** to display the list of attendees not on the voting roster.
 2. Select the attendee.
 3. Select **Select**.
4. Select the vote result from the list.
5. Select **Save**.

View 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 ([Meeting agendas and attendees](#)).
2. Select the link to the meeting.
3. Select the **Agenda & vote** tab.

Add and remove meeting attendees

To set meeting attendees

1. Find the calendar item for which you want to set the attendees ([Meeting agendas and attendees](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific calendar item of interest.
4. Select the **Attendees** tab to display the availability of current attendees.
 - If required, add one or more attendees.
 1. Select **Add**.
 2. Select the users or groups you want to add as attendees.
 3. Select **Save**.
 - If required, remove one or more attendees.
 1. Select the users or groups you want to remove.
 2. Select **Remove**.

Set meeting attendance

To set meeting attendance

1. Find the calendar item for which you want to set the attendance ([Meeting agendas and attendees](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific calendar item of interest.
4. Select the **Attendance** tab.
5. For each attendee, set their attendance from the list menu as **Present** or **Absent**.
6. Select **Save**.

Set 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 ([Meeting agendas and attendees](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific meeting of interest.
4. Select the **Attachments** tab.
5. If required, add one or more attachments to your meeting (see [Attachments](#)).
6. If required, add a record attachment.
 1. Select the **Record attachments** option.
 2. Select the attachment(s) you want to download.
 3. Select **Download**.
7. Select **Submit**.

Send 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 ([Meeting agendas and attendees](#)).
2. Select the **Daily**, **Weekly**, or **Monthly** tab.
3. Select the link to the specific calendar item of interest.
4. Select **Send** to display the email **Notification** page.

**Note:** 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.

5. Complete the required fields and others as needed.

Field name	Description
Outlook Invite for Internal Meeting Attendees	
Template	List of available email templates for internal users, and list of current internal user meeting attendees.

Field name	Description
Outlook Invite for External Meeting Attendees	
External Template	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.

- 1. Select  to view or modify the notification template.

 **Note:** See the section on Communication Manager in the *Accela Civic Platform Release Notes and Addendum* for information on creating and modifying notification templates.

- 1. Select **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.

- 1. Hover over the **Attach** icon  and select the **Attach document** link.
- 1. Select files you want attached to the email notice.
- 2. Select **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 > Maximum Size of Total Files**.

8. Select **Send now**.

 **Note:** Civic Platform sends the notification to selected attendees by standard email, Outlook invite, and Civic Platform alerts.

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.

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. Open the **Calendar** page.

Civic Platform displays a tree view menu of calendar options.

 **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. Select **New**.
- 5. Complete the fields. See [Calendar item details](#) for field definitions.
- 6. Select **Submit**.

Calendar (and related) fields

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.

 **Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Schedule inspections fields

The following fields may be available when scheduling inspections.

Field	Description
Address	This field automatically populates with the application's address.

Field	Description
Alternate ID	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.
Assign to All	Select values from Department and Inspector drop-down lists to assign all the inspections to one inspector from a specific department.
Comment Display in ACA	Activated when you select the Display Comment in ACA option. This is the type of user that can view the inspection results comments.
Department	The department that includes the inspectors to which you want to assign inspections.
Desired Date	The desired date for the inspection.
Desired Time	The desired time for the inspection.
Display Comment in ACA	Applies only to Citizen Access users. Indicates whether ACA users can view the inspection results comments.
Estimated End Time Estimated Start Time	These fields define the time period within which the inspector should arrive. The time period displays in the Estimated Arrival Time field in the inspection in Citizen Access, which enables the applicant to prepare for the inspector's arrival.
GIS Area	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.
Inspector	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.
Inspector Calendar	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.
Inspector List	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.
Inspection List	This list displays all the inspections selected for scheduling. Civic Platform lists inspections by schedule order. Civic Platform highlights the first inspection by default.
Inspection Sequence Number	This field populates with the inspection sequence number. Sequence numbers are unique and incremental.
Inspection	This field displays the type of inspection that you are scheduling.

Field	Description
Type	
Latitude	The inspection location's latitudinal coordinates.
Legend	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.
Longitude	The inspection location's longitudinal coordinates.
Next Available Time	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.
Next Available Time for Inspector	Indicates whether to schedule the inspection for the selected inspector's next available time.
Record ID	The application identification number for which you are scheduling an inspection.
Record Type	The application type for which you are scheduling an inspection.
Request Comment	Comments about the new inspection. You may identify who requested the inspection, or any other important details.
Requestor	The first, middle, and last name of the person who requested or scheduled the inspection, if other than the current user.
Requestor's Phone Number	The phone number for the person who requested the inspection.
Scheduled Date	The date that the inspection is to take place.
Scheduled End Time	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.
Scheduled Start Time	The scheduled time to start the inspection.
Status	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 "Canceled."

Pending inspections fields

The following fields may be available for pending inspections.

Field	Description
Application No.	The application number for which you want to request inspections.
Available Inspection Types	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.
Delete	Use to delete selected inspection types
Existing Pending Inspections	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.
Inspection Group	This displays all available inspection groups. The selected intake form's default inspection group displays first in the list.
Pending Inspections	Assigns the inspection types displayed in the Available Inspection Types list to the selected application. The status for all assigned inspections is Pending.
Pending Inspections List	This list displays two types of inspections: existing pending inspections and inspection types selected from the Available Inspection Types list.
Schedule Inspections	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.
Selected Inspection Types	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.
Selected Records	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.

Field	Description
Address	The application's address.
Alternate ID	The record ID number.
Address	The inspection location address.
Billable	Indicates whether the agency can bill for time spent on an inspection.

Field	Description
Comment Display in ACA	Activated when you select the Display Comment in ACA option. Specifies what type of user can view the inspection results comments. Choices include All ACA Users, Record Creator, and Record Creator & Licensed Professional.
Created by ACA	This field displays “Yes” if the scheduled inspection originated in Citizen Access; otherwise, the field displays “No.”
Department	The inspector’s department.
Display Comment in ACA	Applies only to Citizen Access users. Indicates whether ACA users can view the inspection results comments.
Document Name	Enter the title of the document you are attaching to the inspection.
EDMS Name	The name of the electronic document management system. Use this field when attaching documents to an inspection. For more information, see Inspection calendars .
End Mileage	The mileage reading from the vehicle odometer after you complete the inspection.
End Time	The time that the inspector completes the inspection.
File Name	The filename and path for the document. Users can click Browse to locate the file on your computer. The document size may be up to 16MB.
GIS Area	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.
Inspector	The name of the inspector responsible for completing the inspection.
Inspection Date	The date that you complete the inspection.
Inspection Sequence Number	This field populates with the inspection sequence number. Sequence numbers are unique and incremental.
Inspection Time	The time of day that you complete the inspection.
Inspection Type	The type of inspection scheduled.
Latitude	The inspection location’s latitudinal coordinates.
Longitude	The inspection location’s longitudinal coordinates.
Record ID	The application ID number for which the inspection is to occur.
Record Type	The type of record for which the inspection is to occur.
Request AM/PM	The time block for the scheduled inspection.
Request Comment	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

Field	Description
	Standard Comments button.
Request Date	Civic Platform automatically generates the request date when a user schedules and submits a new inspection.
Requestor's Phone Number	The phone number for the person who requested the inspection.
Request Time	The time of the inspection request.
Scheduled Date	The date when the inspection is to occur.
Scheduled Time	The time when the inspection is to occur.
Status	This field indicates the current status of the inspection. For example, Denied, Not Ready for Work, or Stop Work.
Submit AM/PM	The time block for the scheduled inspection.
Submit Date	The date the inspection was submitted.
Submit Time	The time the inspection request was submitted.
Total Mileage	The total number of miles required. Civic Platform does not calculate this value automatically.
Unit Nbr	This is the inspections unit number. Unit values typically represent either the number of hours or the number of inspections. What does Civic Platform use the Unit Number for? 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.
Vehicle ID	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.

Field	Description
All-Day Event	Indicates whether the event occupies the entire calendar day.
Calendar Item	The distinct name for the event that you want to schedule.
Comments	Additional description or details about the event.
Date	The day to schedule the event.
End Re-occurrence	The date to end a recurring event. Blank when continuing an event indefinitely.
End Time	The end time for the event.
Location	Applies to meeting calendar type only. The location of the meeting.
Maximum Agenda Items	Applies to meeting calendar type only. The maximum number of records you can review at the meeting.
Meeting Body	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.
Meeting Calendar	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.
Meeting Type	Applies to meeting calendar type only. Indicates the type of meeting calendar. Civic Platform only displays those meeting types for which you have permission.
Meeting Status	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.
None	For a one-time event without recurrence.
Reminder	Specifies the number of days, before the meeting, to send out a reminder notification.
Repeat every day(s)	To repeat an event every specified number of days.
Repeat every week(s) on	To repeat an event every specified number of weeks on the specified day of the week.
Repeat every month(s) on	To repeat an event every specified number of months on the specified day of the month.
Repeat every year(s)	To repeat an event every specified number of years.
Responsible Person	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. 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.

Field	Description
Start Time	The start time for the event.
Type	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). Block-out - The user calendar. Blocks out a time or day for which the agency cannot provide service. Holiday - The user and agency holiday calendars. Choose this option to schedule a holiday. During holiday periods, users cannot make reservations or schedule inspections. Weekend - The user and agency holiday calendars. Choose this option to schedule a weekend. During weekend periods, users cannot make reservations or schedule inspections.

Conditions

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.



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 [Clone a record](#).

If a record contains one or more active conditions, the **Condition** column in the record list page displays the condition with the highest severity. You can click the condition link to view the details of the record conditions.

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 [Condition notices](#)).

Conditions have severity levels assigned. These levels define what restrictions apply when a condition with a given security level is in place.

Apply conditions

Conditions can be applied to records to trigger certain actions depending on whether the conditions are met.

Standard conditions are predefined conditions which you can apply to a record. You can also create and apply custom conditions if a standard condition doesn't meet your needs.



Note: Condition fields may vary depending on how your agency configured the Conditions form page. Contact your agency administrator with any questions.

Apply a standard condition

To apply a standard condition

1. Find and open the desired record.
2. Select the **Conditions** tab.
3. Select **New**.
4. From the **Standard condition** list(s), select the standard condition(s) you want to apply.



Note: If your agency has configured Civic Platform to allow application of multiple standard conditions simultaneously, you may see more than one Standard condition list.

5. Complete the required fields and others as needed. See [Conditions form default fields](#) for field definitions.
6. Select **Submit**.



Note: Civic Platform applies the standard condition(s) you selected, and displays the condition(s) on the **Conditions** tab.

Create a standard condition

You can create standard conditions for the **Conditions > New** page. Standard conditions appear in the **Standard condition** list on that page.

To create a standard condition

1. Find and open the desired record.
2. Select the **Conditions** tab.
3. Select **New**.
4. Select the **Standard condition** link.
5. Complete the required fields and others as needed. See [Conditions form default fields](#) for field definitions.
6. Select **Submit**.

Apply 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. If none of the predefined standard conditions apply to a particular situation, you can create a custom condition.

To apply a custom condition

1. Find and open the desired record.
2. Select the **Conditions** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Conditions form default fields](#) for field definitions.
5. Select **Submit**.



Note: Civic Platform applies the custom condition and then displays the conditions on the **Conditions** tab.

Edit or delete an existing condition

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. Find and open the desired record.
2. Select the **Conditions** tab.
3. Do one of the following:
 - To edit the condition, open the condition, update the fields as needed, and select **Submit**.
 - To delete the condition, select the check box next to the condition and select **Delete**.

View an inactive condition

When you delete a condition from a record, the condition becomes inactive but remains in the condition list. For information about deleting a condition, see [Edit or delete an existing condition](#).

To view an inactive condition

1. On the desired page, find and open the desired record.
2. Select the **Conditions** tab.
3. In the **Condition name** column, select the desired link.



Note: You cannot edit the details of an inactive condition.

View 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. Find and open the desired record.
2. Select the **Conditions** tab.
3. In the **Condition name** column, select the desired link.
4. Select the **Condition history** tab.

Condition notices

If a record is set to display condition notices (see **Display notice** in [Conditions form default fields](#)), Civic Platform displays the condition status bar on the record page.

The condition status bar shows the condition with the highest severity, along with the date of the last update. The condition status bar also displays the total number of conditions by severity.



Note: The total number of conditions displayed does not count the conditions without the severity specified.

To address general conditions on a record

1. Find and open the desired record.
2. Select the **Conditions** tab.
3. Select a condition in the **Condition name** column.
4. Complete any of these steps as needed:
 - Make changes to any fields as needed and select **Submit**. For a description of condition fields, see [Condition details](#).
 - If the condition severity is **Hold** and you have the correct permissions, you can select **Override** to change the severity to none.
 - If the condition severity is **Lock** and you have the correct permissions, you can select **Unlock** to change the severity to none.
 - Select **Reset** to undo current changes.



Note: When you select **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.

Apply, update, or view conditions of approval

Use conditions of approval to define requirements to be met before an applicant receives approval for a permit or an inspection. You can apply conditions of approval to a record or record set.



Note: The information on the **Conditions of approval** tab is slightly different, depending on whether the record is for an inspection:

- The **Conditions of approval** tab for an inspection only displays the conditions of approval applied to the inspection itself.
- The **Conditions of approval** tab for a record or a record set displays the conditions of approval applied to the record or record set *and* those applied to any inspections associated with the record or record set.

The process of working with conditions of approval is very similar for different record types and for record set members. The only difference is the starting page.

Apply a condition of approval

You can apply standard conditions of approval that are predefined by your agency administrator to records or record sets.



Note: You cannot manually create a custom condition of approval and apply it to a record or record set.

To look up a standard condition of approval and apply it

1. On the desired page, find and open the desired record or record set.
2. Select the **Conditions of approval** tab.
3. Select **New**.
4. Complete the required fields and others as needed. For a description of the fields, see [Condition details](#).
5. Select **Submit**.
6. Select the desired standard condition of approval and select **Select**.

Update conditions of approval



Note: The options available to you depend on your permissions in the system. Contact your supervisor or system administrator with any questions.

To update conditions of approval

1. On the desired page, find and open the desired record.
2. Select the **Conditions of approval** tab.
3. Complete any of these options as needed:
 - To change the status of conditions of approval, do any of the following:
 - Select one or more pending conditions of approval and select **Mark selected as met**.
 - Select the **Actions** link next to a condition of approval and select the appropriate status.
 - To change the priority of conditions of approval, do any of the following:
 - Select one or more conditions of approval, hover over **Change priority**, and then select the desired priority level.
 - Select the **Actions** link next to the desired condition of approval, hover over **Change priority**, and then select the desired priority level.
 - To edit the details of a condition of approval, open it as instructed in [View a condition of approval](#) and edit the fields as needed. For a description of the fields, see [Condition details](#). When you are finished, select **Save**.

Restore conditions of approval

If you update a condition of approval by mistake, you can restore the condition of approval to its original state. The creation of the condition of approval and other actions are cleared from the status history.

To restore conditions of approval

1. Find and open the desired record.
2. Select the **Conditions of approval** tab.
3. Select one or more conditions of approval to restore and select **Reset**.

View 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. Find and open the desired record.
2. Select the **Conditions of approval** tab.
3. Find the condition of approval by doing one of the following:
 - Select the desired link from the **Sort by** options.
 - Enter a keyword in the **Type to find** field.
4. Do any of the following:
 - To view the details of a condition of approval, select the **Actions** link next to the condition of approval and then select **Open**. For a description of the fields, see [Condition details](#).
 - To view the status history of the condition of approval, select the Status's date link.

Delete a condition of approval



Note: You cannot delete a condition of approval from the **Condition notice** bar.

To delete a condition of approval

1. Find and open the desired record.
2. Select the **Conditions of approval** tab.
3. Find the condition of approval by doing one of the following:
 - Select the desired link from the **Sort by** options.
 - Enter a keyword in the **Type to find** field.
4. Do either of the following:
 - Select one or more conditions of approval and select **Delete**.
 - Select the **Actions** link for the condition of approval and then select **Remove**.

Condition details

The following tables describe fields that may be available when working with conditions.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Conditions form default fields

Field	Description
Action by dept	The department responsible for following up on the condition status.
Action by user	The staff member responsible for following up on the condition status.
Additional information	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.
	 Note: This field is not searchable. However, your agency can configure the Conditions page to include ASI fields for users to enter important searchable words from the Additional Info field.
Applied by dept	The department responsible for applying the condition.
Applied by user	The staff member responsible for applying the condition.
Applied date	The date when the condition should be applied. The Applied date defaults to the current date in any of the following scenarios: - You are adding a standard condition - You are creating a new condition - The condition is auto-assigned to a record
Condition name	A description of the condition. For example, "Outstanding Balance."
Display notice	This field indicates whether or not to activate the "Include in Condition Notice" options. When a user accesses a record, the Condition Notice is visible in the condition status bar.
Effective date	The date when you want this condition to become effective.
Expiration date	The date when you want this condition to expire.
Group	The condition group, used to organize conditions into condition types.
Include in condition notice	Used to indicate items to be included in condition notices.

Field	Description
Long comments (4,000 char max)	Used for comments that exceed the character limit of the Short comments field, but not the 4,000 character limit of this field. This field is searchable. This field supports the insertion of standard comments via the Standard comments picker.
Object name	The type of object you are applying the condition to, such as Record, Inspection, Asset, Address, Parcel, etc.
Object value	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.
Priority	The priority level of the condition.
Public display message	Text in this field displays in Accela IVR and Citizen Access in the condition notice or condition status bar for the public user. This text displays in place of Condition name and Short description values.
Resolution action	The actions or set of tasks the user should perform to resolve a condition.
Severity	The severity of the condition. Options may include Required , Lock , Hold , or Notice .
Short comments (2,000 char max)	Used for comments that do not exceed the 2,000 character limit for this field. This field is searchable. This field supports the insertion of standard comments via the Standard Comments picker. To expose the contents of this field to agency and public users, select Short comments for the Include in condition notice field.
Status	The condition status (Applied or Not Applied).
Status date	The date when the condition status is changed. The field defaults to the current date when the Status value changes.
Type	This is an agency-defined condition type.

Other condition field descriptions and actions

Field	Description
Condition name	The name or number used to identify the condition. When a user applies a condition, this is the Condition name they will select.
Condition type	The condition type is used to ensure that requirements are met before a record can proceed. For example, a "Planning" condition type could be used for conditions that apply only to objects in the planning review stage.
Display notice	Options are Yes or No . When you select Yes , the Include in condition notice options are activated. When a user accesses a record and this field is set to Yes , the user can see the condition notice in the condition status bar.

Field	Description
	If you set this to No , then the user does not see the condition notice in the condition status bar. However, the condition still applies to the record.
Include in condition notice	Used to indicate items to be included in condition notices.
Inheritable	This is a required field with No as the default. If this field is set to Yes, 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. If the parent record condition status is updated (status of Not Applied), then the child record condition status is not updated. If this field is set to No, then no conditions are copied or inherited by the child record when it is created from a parent record. This field is configured by your agency administrator. Contact them with any questions.
Long comments (4000 char max)	Used for a description of the condition and/or any comments to help identify the purpose of the condition.
Public display message	This field relates only to Accela IVR and Citizen Access. If text is entered into this field, then in IVR and Citizen Access: - The text displays in the condition notice or condition status bar for the Condition Name for the citizen user. - The Condition Name and Short Description will not display for the citizen user. If text is not entered into this field, then in IVR and Citizen Access: - The Condition Name and/or Short Description displays in the citizen user Condition Notice. - If Condition Name and Short Description are not selected, the Condition detail does not display in the Condition Notice for a citizen user.
Resolution action	Used to provide the actions or tasks the user follows to resolve the condition severity level.
Short comments (2000 char max)	Used for a brief description of the condition. 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 record with this condition applied to it. The comment displays in the condition status bar.
Severity	Used to indicate the severity of the condition. The levels are Lock , Hold , Notice , or Required . For an explanation of each severity level and accompanying restrictions, see Condition severity levels .

Condition severity levels

The table below describes the effects of each condition severity level, for both records and reference objects.

Condition	Record Results	Reference Object Results
Lock	- 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.
Hold	- 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.
Notice	The Notice condition indicates special instructions to the person who completes the record. Notices do not inhibit the record process in any way.	The Notice condition lets you associate a notice with an object, such as an address, a parcel, or a professional. Civic Platform displays a pop-up window when you open the record or associated object.
Required	The Required condition is unique to workflow tasks. The user must complete an activity or field before proceeding to the next one.	The user can update the workflow only when the process validation is met.

Contacts

Use the **Contacts** tab in a record or the **Contacts** page to add, maintain, and view information about the people associated with an application.

There are two types of contacts, Reference contacts and Transactional record contracts.

- **Reference contacts**

A reference contacts 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 the application. This saves time and 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.

- **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.

Add, edit, and search reference contacts

A reference contacts 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 the application. You can add reference contacts independent of individual records and applications, build relationships between reference contacts, merge reference contact records, and more.

Add 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. On the **Contacts** page, select **New**.
2. Complete the required fields and others as needed. See [Contacts details](#) for field definitions. If you are importing contact details from an external permitting system, see [Applicant and contact section](#).
3. Select **Submit**.

Tips on searching for a contact

- **Perform 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 for information about using search functionality in Civic Platform.

- **Search by also-known-as names**

If you search contacts by the **First**, **Middle**, **Last name**, and/or **Full name** fields, Civic Platform checks the standard contact fields and also the also-known-as names (see [Add also known as names of a contact](#)) for matches.

- **Look 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 are close matches to your search criteria.

Look 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: Your agency can configure close match criteria for both individual reference contacts and organization reference contacts. Contact your agency administrator with questions.

To look for close matches to your search criteria

1. Perform a standard contact search.
2. Select **Close matches** to view the close matches to the search criteria.

Edit 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. On the **Contacts** page, find and open the desired contact.
2. Modify the fields as needed. See [Contacts details](#) for field definitions.
3. Select **Submit**.

Add 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 their 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. On the **Contacts** page, find and open the desired contact.
1. Select the **Also known as** tab.
2. Select **Add**.
3. Complete the required fields and others as needed.
4. Select **Save**.

Create, add existing, and deactivate contact addresses

You may want to maintain the contact address information for a contact; for example, the mailing address 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.

Create 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. On the **Contacts** page, find and open the desired contact.
2. Select the **Contact address** tab.
3. Select **New**.
4. If needed, check to see whether validation is required for your new address. Otherwise, skip to the next step.
 1. Check whether the **Validate** button displays in the **Contact address** tab.



Note: Even if this button is available, your agency may require you to validate only certain types of contact addresses against an external address source.

2. Specify the address type and country/region of the address, and then select **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 as needed. See [Contacts details](#) for field definitions.
6. If the address you are adding requires validation, do the following:
 1. Select **Validate**.
 2. If you use to add an address from the list, select that address and select **Select**.
 3. If you do not want to accept any of the validated addresses as correct, select **Cancel**.
7. Select **Submit**.

Add 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.

To add an existing address as contact address

1. On the **Contacts** page, find and open the desired contact.
2. Select the **Contact address** tab.
3. Select **Look up**.
4. Enter search criteria in the address fields, then select **Submit**.
5. Select the addresses that you want to add, and select **Select**.
6. Select the **Contact address ID** link for your newly-added address.
7. Complete the required fields and others as needed (see [Contacts details](#)).
8. Select **Save**.
9. Repeat the process for each contact address you want to update.

Deactivate 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. On the **Contacts** page, find and open the desired contact.
2. Select the **Contact address** tab.
3. Select the contact address you want to deactivate.
4. Select **Deactivate**.



Note: 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.

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 [Create a contact address for a contact](#).
7. Select **Submit**.



Note: 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.

Build relationships between reference contacts

Building relationships between reference contacts enables you to set up a contact network in Civic Platform.



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 relationships for a reference contact

1. On the **Contacts** page, find and open the desired contact.
2. Select the **Contact relationship** tab.
3. Do any of the following as needed:
 - To filter the contact relationship list:
 1. Enter one or more filter criteria.
 2. Select **Filter**.
 - To relate one or more reference contacts with the current contact:
 1. Select **Look up**.
 2. Enter search criteria as appropriate, then select **Submit**.
 3. If the search results do not contain the contact(s) you want to add, select **Close matches** to retrieve close match contacts.
 4. Select the contact(s) you want to relate with the current contact, and then select **Select**.
 5. Enter the relationship details.
 6. Select **Select**.



Note: Civic Platform adds the new relationship into the relationship list for both the current contact and the target contact.

- To edit an existing relationship:
 1. Select the link in the **Current contact role** column of the relationship.
 2. Update any of the fields that display, and select **Submit**.
- To delete or deactivate an existing relationship:

1. Select the contact relationship that you want to remove or deactivate.
2. Select **Delete** to delete the contact relationship, or **Deactivate** to deactivate it.



Notes:

- 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.

Merge contacts

If your agency enables merge functionality, 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. On the **Contacts** page, select at least two enabled contacts that you want to merge.



Note: Do not merge individual contacts with organization contacts.

2. Select **Merge**.
3. Select the contact that you want to define as the target contact, and then select **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.

4. 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 ([Merge contacts](#)). Select 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 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.

5. Select **Finish** to merge the contacts.



Notes:

- 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.

Contacts in records

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 page. Depending on your user privileges, you may also be able to look up a contact from your reference database and 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.

Add, edit, and remove record contacts

You can add, edit, remove, and deactivate contacts on a record. After you add a contact, you need to synchronize the contact. See [Synchronize contacts](#) for more information.

Add 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Hover over the **Manage contacts** button and select **Look up**.
4. Enter search criteria as needed to find the contact you seek, then select **Submit**. You can search reference contacts by contact standard fields, contact activities, or contact addresses. See [Contacts details](#) for field definitions.



Note: 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).

5. Do one of the following:

- If the search results contain the contact(s) you want to add, select the contact you want to add and select **Select**.
- If the search results do not contain the contact you want to add, select **Close matches** to retrieve close match contacts (see [Look for close matches](#)).
- To create a new reference contact, select **New in reference**. Change the contact type for the newly-added contact as needed. For more information, see [Edit a contact on a record](#).



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

If the selected contact has multiple contact addresses, select the contact addresses to add in the pop-up Contact address look up form and then select **Select**.

Add 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: The **Look Up Staff** option is only available if your agency configured it. Contact your agency administrator with questions.

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 monitor a case as it moves through its life cycle.

To add an internal user as a contact on a record

1. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Hover over the **Manage contacts** button and select **Look up staff**.
4. Enter search criteria to locate the staff member you want to add.
5. Select **Submit**.
6. Select the check box next to the contact you want from the results list.
7. Select **Select**.
8. Complete the required fields and others as needed.
9. Select **Submit**.

Add 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Hover over the **Manage contacts** button and select **New**.
4. Complete the required fields and others as needed. See [Contact detail fields](#) for field definitions.
5. In the **Contact address** subsection, add the address information for the contact.
6. Select **Submit**.
7. Do one of the following:
 - Select a contact from the search results, then select **Select**.
 - Select **Close matches** to retrieve more close match contacts, select a contact from the new list, and then select **Select**.
 - Select **New in reference** to create a new reference contact, complete the fields in the new contact form, and select **Submit**. You can now select the contact you just created, and select **Select**.

Edit 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Do any of the following:
 - If you want to change the contact type, select a type from the **Type** list.



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. Accept the message and complete the required information.

- If you want to edit the contact or contact address details, select the **Contact number** link for the contact. Edit the fields as needed. See [Contact detail fields](#) for a list of field descriptions.

4. Select **Submit**.

Remove or deactivate 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Select the check box next to the contact you want to remove or deactivate and do one of the following:
 - **To remove the contact**
 1. Hover over the **Manage contacts** button.
 2. Select **Remove**.
 - **To deactivate the contact**
 1. Hover over the **Manage contacts** button.
 2. Select **Deactivate**.
 3. Enter the contact end date, and then select **OK**.

Synchronize contacts

When you add a record contact by looking up a reference contact (see [Add 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.

Synchronize 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Select the check box next to the contact you want to synchronize from its reference.



Note: You can only synchronize one record contact at a time.

4. Hover over the **Manage contacts** button, and select **Sync from reference**.



Note: 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:

1. In the reference contact lookup form, enter search criteria as needed to find the contact you seek, then select **Submit**. You can search reference contacts by contact standard fields, contact template fields, contact activities, or contact addresses. See [Contact detail fields](#) and [Contact address fields](#) for field definitions.
2. If the search results do not contain the contact you want to find, select **Close matches** to retrieve close match contacts. For more information on close match search, see [Look for close matches](#).
3. Select the check box next to the contacts you want to synchronize to the record contact and then select **Select**.



Note: 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 [Add, edit, and search reference contacts](#).



- 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.

Synchronize 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. From the desired page, find, and open the desired record.
2. Select the **Contacts** tab.
3. Select the check box next to the contact you want to synchronize to its reference.



Note: You can only synchronize one record contact at a time.

4. Hover over the **Manage contacts** button, and select **Sync to reference**.



Note: 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:

1. In the reference contact lookup form, enter search criteria as needed to find the contact you seek, then select **Submit**. You can search reference contacts by contact standard fields, contact activities, or contact addresses. See [Contact detail fields](#) and [Contact address fields](#) for field definitions.
2. If the search results do not contain the contact you want to find, select **Close matches** to retrieve close match contacts. For more information on close match search, see [Look for close matches](#).
3. To synchronize the record contact to an existing reference contact, select the contact you want to synchronize the record contact to and select **Select**.
4. To synchronize the record contact to the reference as a new reference contact, select **New in reference** to create a new reference contact. After you complete the fields in the pop-up Contact new form, select **Submit**.

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.



Note: 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 [Add, edit, and search reference contacts](#).

Stop 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. From the desired page, find and open the desired record.
2. Select the **Contacts** tab.
3. Select the check box next to the contact you want to synchronize to its reference.



Note: You can only synchronize one record contact at a time.

4. Hover over the **Manage contacts** button, and select **Stop sync**.

View 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.

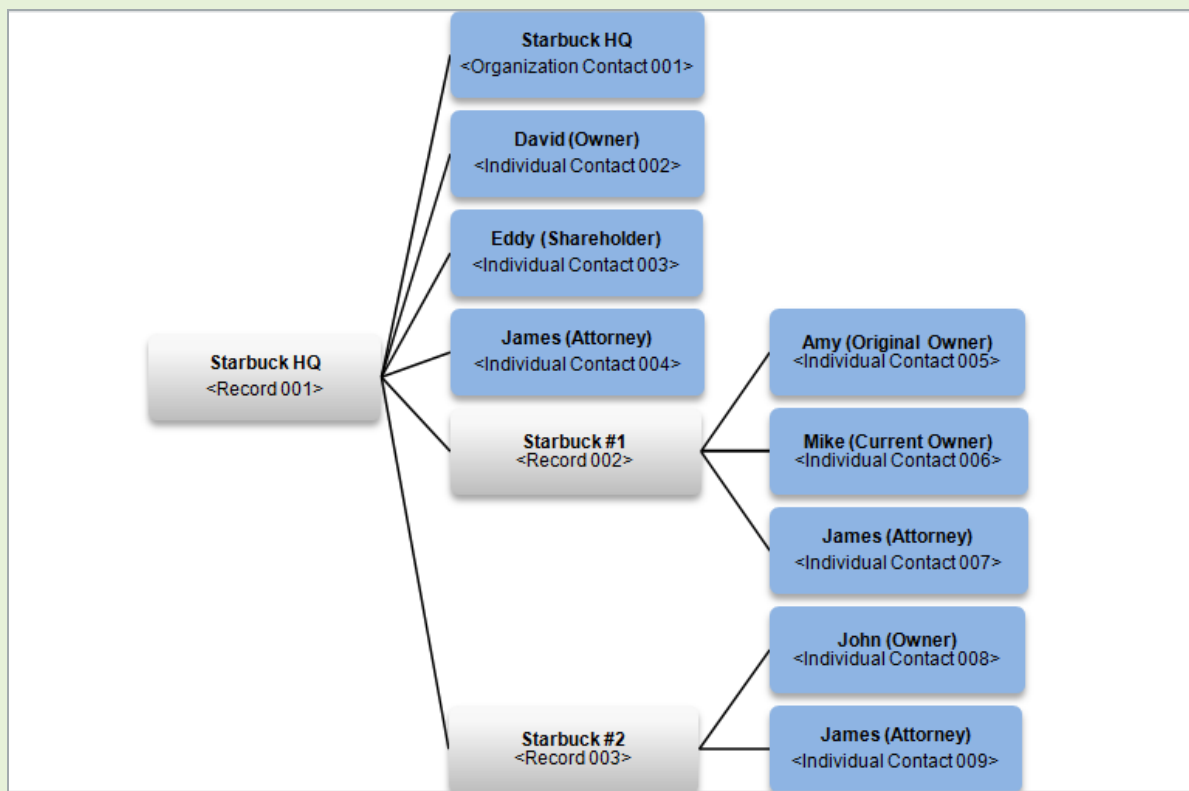
You do not need to associate contacts with other contacts manually. When you create a record for a business and add all of the employees of that business to the record as contacts, the relationships between the individuals establish automatically.



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)



View 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. From the **Contacts** page, select the **Related contacts** tab.
2. 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.
 - To view the details about the related contact, click the **Contact number** link next to the contact that you want to view.
 - To view the details about the condition on a related contact, click the **Condition** link next to the contact that you want to view.
 - 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.
 2. Click a related record link in the pop-up window.

Search for and filter related contacts

There are three ways for you to filter the contents of the Related Contacts list.

- 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 in Search.
- You can create a filter and apply it to the **Related contacts** list. See [Filters](#) 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.

Apply a condition to a reference contact

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](#).

View records associated with a contact

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. From the **Contacts** page, find and open the contact you want to work with.
2. Click the **Record List** tab.
3. You can use **My filters** to filter the list. You can also select records and create a set from the selected records. For more information about sets, see [Filters](#).

Add and synchronize professionals with a contact

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.

Add 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** page. You can also select the licensed professional link to navigate to the **Professionals** page.

To search for a licensed professional and associate it with a contact

1. Navigate to the **Contacts** page.
2. Select the **Professionals** tab.
3. Select **Look Up**, enter the search criteria in the licensed professional fields, and select **Submit**.
4. Select the check box next to the licensed professional(s) you want to associate with the contact.
5. Select **Select**.



Note: To disassociate a professional from the current contact, select the check box next to the licensed professional you want to remove, then select **Delete**.

Synchronize 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 page and the Professionals page with the exception of the Status field.

To synchronize contact information to associated professionals

1. From the **Contact** page, select the **Professionals** tab.
2. Select the check box next to the licensed professionals to which you want to synchronize the contact information.
3. Select **Sync contact info**.

Create, associate, or delete reference addresses for a contact

Civic Platform provides the ability to build associations between contacts and reference addresses (see [Reference addresses](#)). You can create a reference address for a contact or add an existing reference address to a contact.

Create a new reference address for a contact

If you create a reference address from the Contacts page, you can search for and apply the reference address as normal reference address, as if you had created it created from the Reference address page.

To add a new reference address to a contact

1. From the **Contacts** page, find and open the desired contact by clicking the link in the **Reference contact ID** column.



Note: The **Contacts** page may have its own main link or be grouped with the APO pages.

2. Select the **Address** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Contacts details](#).
5. Select **Submit**.

Associate 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. From the **Contacts** page, find and open the desired contact by clicking the link in the **Reference contact ID** column.



Note: The **Contacts** page may have its own main link or be grouped with the APO pages.

2. Select the **Address** tab.
3. Select **Look up**.
4. Enter the search criteria to find the desired address. For field descriptions, see [Contacts details](#).
5. Select **Submit**.
6. Select the check box for the address you want to associate with the contact.
7. Select **Select**.

Delete 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. From the **Contacts** page, find and open the desired contact by clicking the link in the **Reference contact ID** column.



Note: The **Contacts** page may have its own main link or be grouped with the APO pages.

2. Select the **Address** tab.
3. Select the check box next to the address you want to delete.
4. Select **Delete**.

Manage public users associated with contacts

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 page, 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.

To manage the association between a contact and a public user

1. From the **Contacts** page, find and open the contact with which you want to work.
2. Select the **Associated public user** tab.
3. Do any of the following:
 - To associate a public user with the current contact:
 1. Select **Look Up**, enter your search criteria, and select **Submit**.
 2. Select the check box next to the public user you want to associate with the contact.
 3. Select **Connect**.
 - To view and edit a public user associated with the contact.
 1. Select the **Email** field for the public user with whom you want to work.
 2. Update any fields as necessary. See [Contacts details](#) for field definitions.
 3. Select **Save**.
 - To remove the association of a public user with the contact.
 1. Select the check box next to the public user from which you want to remove the association.
 2. Select **Delete**.

View assets associated with a contact

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. From the **Contacts** page, find and open the contact you want to work with.
2. Select the **Assets** tab.

Contacts details

The following tables describe fields that may be available when working with contacts.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Contact detail fields

Field	Description
Address line 1 Address line 2 Address line 3	The contact's address information. Up to three lines of address information may be displayed.
Birth date	The contact's birth date. This field is active only when Contact Type = Individual.
Birthplace city	The contact's birthplace city. This field is active only when Contact Type = Individual.
Birthplace country/region	The contact's birth country or region. This field is active only when Contact Type = Individual.
Birthplace state	The contact's birthplace state. This field is active only when Contact Type = Individual.
Business name 2	- 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 besides the Organization name and/or DBA/Trade name.
City	The city in which the contact resides.
Contact number	(Only for contacts associated with records.) An auto-generated ID number that identifies the contact.
Contact status	For a reference contact, this field indicates the status of the contact (enabled or disabled). For a contact associated with a record, this field indicates the status of the association between the contact and the record.
Contact type	The type of contact; for example, individual or organization.
Country/region	The country or region in which the contact resides.
DBA/trade name	The contact's preferred business or trade name. This field is active only when Contact Type = Organization.
Deceased date	The contact's death date, if applicable. This field is active only when Contact Type = Individual.
Driver's license number	The contact's driver's license number. This field is active only when Contact Type = Individual.
Driver's license state	The state that issued the contact's driver's license. This field is active only when Contact Type = Individual.

Field	Description
Email	The contact's email address.
End date	(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 contact status automatically changes to Inactive.
Fax	The contact's fax number, with country and area code.
FEIN	The Federal Employer Identification Number. This field is active only when the Contact Type = Organization.
First name	The contact's first name. This field is active only when Contact Type = Individual.
Full name	The contact's full name. This field is active only when Contact Type = Individual.
Gender	The contact's gender. This field is active only when Contact Type = Individual.
Last name	The contact's last name. This field is active only when Contact Type = Individual.
Middle name	The contact's middle name. This field is active only when Contact Type = Individual.
Notify contact with record update	(Only for contacts associated with records.) Indicates whether Civic Platform should notify this contact when an application or service request status changes.
Number (ID)	A unique auto-generated number that identifies this contact in your Civic Platform system.
Notes	Notes for the contact.
Organization name	The organization for the contact. This field is active only when Contact Type = Organization.
Passport number	The contact's passport number. This field is active only when Contact Type = Individual.
Permissions	The contact's level of access to associated records in Citizen Access. Options include: • Full (full access) • Schedule inspections only (ability to schedule inspections, plus read-only access to the My record list and Record search result list) • Read (read-only access for the My Record list and the Record search result list) • None (no access)
Phone 1 Phone 2 Phone 3	The contact's phone number(s).
P.O. box	The contact's post office box number.
Preferred channel	The method by which the contact prefers to receive communications; for example, by phone, email, fax, or postal mail.

Field	Description
Race	The contact's race/ethnicity.
Reference contact ID	An auto-generated ID number that identifies the reference contact in Civic Platform.
Relationship	The contact's relationship to the application or the service request.
Salutation	Salutation to use when addressing the contact; for example Mr. or Ms. This field is active only when Contact Type = Individual.
SSN	The contact's Social Security number. This field is active only when Contact Type = Individual.
Start date	(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.
State	The state in which the contact resides.
State ID number	The contact's state ID number. This field is active only when Contact Type = Individual.
Suffix	The suffix for a contact name, such as Jr., Sr., or PhD.
Sync	(Only for contacts associated with records.) Indicates whether the record contact is in sync with the reference source contact. • Yes indicates that the following information for the record contact is in sync with the 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. • No indicates that only the contact addresses for the contact are in sync with the reference source, or that a record contact has no reference source.
Title	The contact's business title. This field is active only when Contact Type = Individual.
Type	The type of contact. Civic Platform uses contact types to group contacts with similar functions.
Zip	The contact's ZIP code.

Contact address fields

Field	Description
Address line 1 Address line 2 Address line 3	The contact's address information. Up to three lines of address information may be displayed.
Address type	The contact address type. Your agency administrator configures the address type.

Field	Description
	Examples include home address or mailing address.
City	The city where the contact resides.
Contact address ID	The system-generated ID for the current contact address.
Country/region	The country/region where the contact resides.
Direction	The street direction of the primary address line in the contact address. For example, in the address 150 North Main Street, North is the direction.
End date	The date when the contact address ceases to be active.
Fax	The contact's fax number, with country and area code.
Full address	The full address of the contact.
House # alpha (end)	The ending house 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 house number.
House # alpha (start)	The beginning house 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 house number.
Level # (end)	The ending level number (floor number). Used to identify a floor or level of a multi-story building/sub-complex.
Level # (start)	The beginning level number (floor number). Used to identify a floor or level of a multi-story building/sub-complex.
Level prefix	The prefix for the level numbers (floor numbers).
Phone	The contact's phone number, with country and area code.
Primary	Indicator that this address is the primary contact address. Only one contact address can be the primary address at a time.
Recipient	The contact person for the contact address.
Start date	The starting date for the contact address to be active.
State	The state where the contact resides.
Status	The status of the contact address (active or inactive).
Street # (end) Street # (start)	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 single street number in either field. Agencies can configure the Street # (start) and Street # (end) fields to support range searching (adding To and From fields), allowing users to search for one or multiple street numbers within a user-defined range.
Street name	The street name of the primary address in the contact address.

Field	Description
Street prefix	The street prefix of the primary address in the contact address.
Street suffix (direction)	The street suffix of the primary address in the contact address.
Street type	The street type of the primary address in the contact address. For example, Street, Boulevard, or Lane.
Unit # (end) Unit # (start)	The unit range of the primary address in the contact address.
Unit type	The unit type designation of the primary address in the contact address; for example, condo, apt, or suite.
Validated	Displays whether Accela Civic Platform has validated the address against an external address source.
ZIP code	The ZIP code of the contact address.

Contact relationship fields

Field	Description
Current contact role	The role that the current contact plays for the contact you selected.
Target contact role	The role that the contact you selected plays for the current contact.
Start date	The date when the relationship starts.
End date	The date when the relationship ends.
Relationship status	The current status of the relationship (active or inactive).

Public user search fields

Field	Description
Address	The public user's address.
Business name	The public user business name, if applicable.
Cell phone	The public user's cellular phone number.
City	The public user's city of residence.
Confirm	The public user's password. This field is used for a second entry of the password for

Field	Description
password	verification.
Email	The public user's email address. By default, this is the User ID.
Fax	The public user's fax number.
First name	The public user's first name.
Home phone	The public user's home telephone number.
Last name	The public user's last name.
Middle name	The public user's middle name.
Pager	The public user's pager number.
Password	The public user's password used when logging in to Citizen Access.
Password request answer	The answer to the password request question.
Password request question	Password request question. If a public user forgets the password, the user can answer this question. If the answer is correct, Civic Platform sends an email with further instructions to the user's email address.
Preferred contact channel	The method by which the contact prefers to receive communications; for example, by phone, email, fax, or postal mail.
Preferred phone	The public user's preferred phone number.
State	The public user's state of residence.
User ID	The user ID for logging in to Citizen Access. The default User ID is the email address provided during registration. You can modify this field.
User role	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.
Work phone	The public user's work telephone number.
ZIP	The public user's ZIP code.

Education and examination providers

You can create education and examination provider records in the **Licensed professional** page, using license type to identify the different provider types. You can also enter and track information about examinations and examination sites.

Add a provider

When you configure a licensed professional record as an examination provider, Civic Platform enables a **Provider** tab on the record detail page. Define a provider type to indicate the type of education that they offer: education, continuing education, or examination.

To create a provider record

1. From the **Licensed professionals** page, select **New**.
 2. 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.
 3. Select **Submit**.
 4. Select the **Provider** tab.
 - 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 agency administrator.
5. 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 re-certification 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. Select **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)

6. Select **Submit**.



Note: If you selected examination provider as the provider type, Civic Platform adds two secondary tabs to the record: **Examination** and **Examination sites**.

7. To work with exam subjects offered by a provider, see [Associate examination subjects with a provider](#)
8. To schedule exams, see [Schedule an examination](#).
9. To assign proctors, see [Assign a proctor to administer an examination](#).
10. To work with exam registrants, see [Registered records](#).

Associate 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. Contact your agency administrator with questions.

To add an examination to a examination provider

1. From the **Licensed professional** page, open the provider record you want to work with.
2. Select the **Examination** tab.



Note: If you do not see this tab, the selected provider is not configured to be an examination provider. See [Select the provider type](#) for more information.

3. Select **Assign**.
4. Complete the required fields and others as needed see [Examination fields](#) for field definitions..



Note: If the examination you want to add is not listed in the examination list, contact your agency administrator.

5. Select **Submit**.

**Notes:**

- To schedule the exam, see [Schedule an examination](#).
- To work with exam registrants, see [Registered records](#).

Schedule 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. From the **Licensed professionals** page, open the provider with whom you want to work.
2. Select the **Examination** tab.



Note: If you do not see the **Examination** tab, the selected provider is not configured to be an examination provider. See [Select the provider type](#) for more information.

3. Open the examination.
4. Select the **Schedule** tab.
5. Do one of the following to 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 also use the date picker tool to the right of the field.
 2. Specify the **Start time** and **End time** of the exam
 3. Select **None** in the **Recurrence** field.
 - 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. Select the **Add time period** command above the **Start time** and **End time** fields to add a new time period row.

Repeat step 2 until you have enough rows for each time you want to schedule.
 3. Specify the **Start time** and **End time** of each exam.
 4. Select **None** in the **Recurrence** field.
 - 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 also use the date picker tool to the right of the field.
2. If you have more than one time period per day, select the **Add time period** button above the **Start time** and **End time** fields to add a new time period row.
3. Specify the **Start time** and **End time** of the each exam.
4. In the **Recurrence** field, 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.
6. 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 [Add examination sites and update scores](#) for more information.

1. Select **Add** to the right of the **Examination sites** label.
2. Select the check box(es) next to the site(s) you want to add to your scheduling form.
3. Select **Select**.

Civic Platform returns to the **Schedule** tab with the selected examination site(s) displayed in the **Location** section of the form.

7. Assign proctors for each exam site you added. See [Assign a proctor to administer an examination](#) for more information.
8. Select **Save**.



Note: After you submit a schedule, exam sessions display in the license applications as options for exam selection. For information about how to select an exam session in a license application, see [Record application intake form sections](#).

Assign a proctor to administer an examination

When you assign proctors for exams, Civic Platform sends a notification to the selected individual(s), inviting them to proctor exams which are listed in the email. The email provides the contact with the opportunity to accept or decline the assignment by selecting the appropriate link.

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 [Schedule an examination](#) before you assign a proctor.

1. From the **Licensed professionals** page, find and open the provider to which assign a proctor.
2. Select the **Examination** tab.
3. Select the exam.
4. Select the **Schedule** tab and scroll to the **Examination sites** list.
5. Select **Assign proctors** for the exam site where you need a proctor.



Note: 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 select **Filter**.

6. Select the exam sessions that you want the proctor to administer.
7. Select **Continue**.
8. Enter search criteria to locate the person you want to proctor the exam(s). The individual must be an existing reference contact. See [Add a reference contact](#) for information about adding a new contact if needed.
9. Select **Submit**.
10. From the search results, select the individual(s) that you want to invite to proctor the selected exam(s).
11. Select **Select**.



Note: 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 selecting the appropriate link.

Track 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 selecting the appropriate link.

You can use the **Registered records** tab to track to whom you have sent proctor assignment invitations, 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.

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 [Reassign an examination to a new proctor](#) for more information.

Remove 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 them of the change in assignment.

See [Reassign an examination to a new proctor](#) for more information on removing a proctor.

Reassign an examination to a new proctor

When you assign a proctor to an examination, Civic Platform sends the prospective proctor an email invitation which they 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 [Schedule an examination](#) before you assign a proctor.

1. From the **Licensed Professionals** page, find and open the provider
2. Select the **Examination** tab.
3. Select the exam.
4. Select the **Registered records** tab.
5. From the **Time** and **Site** list menus, select the examination event for which you want to reassign a proctor.



Note: Proctor information for the selected event displays below the **Time/Site**.

6. To view details about a proctor, select the **View** link for the proctor.
7. To remove a proctor from the list, select the **Delete** link for the proctor you want to remove.
8. Select **OK**.



Note: Civic Platform removes the proctor and sends an email to the proctor, informing them of the action.

9. Select **Assign Proctors** in the toolbar.
10. Enter search criteria and select **Submit**.
11. Select the individual that you want to assign to proctor this exam.

12. Select **Select**.



Note: 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 them to accept or decline the assignment.

Select 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 select **Lookup** (if your application intake form has includes multiple contact sections, the Lookup button is not available).



Note: 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. Select **Submit**.

The selected record(s) become part of the application, and Civic Platform prevents the records from deletion in the Contact Reference page.

Approve 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 or disapprove an exam or education record

1. From the **Records** page, .open the record to approve or disapprove examination or education records.
2. Select one of the following tab:

1. **Examinations**
2. **Education**
3. **Continuing education**
3. Select the check box next to the object(s) you want to approve or disapprove.
4. Do one of the following:
 - Select **Approve** to approve the object.
 - Select **Disapprove** to disapprove the object.



Note: If approved, the object record auto-synchronizes to the reference contact.

Registered records

The **Registered records** tab allows you to view, reschedule, cancel, and assign registrants for examinations.

View registrants

1. From the **Licensed professionals** page, find and open the examination provider.
2. Select the **Examination** tab.
3. Open an examination.
4. Select the **Registered records** tab.
5. Use the **Previous** and **Next** buttons to view data for other exam dates. You can also use the **Time** and **Site** fields to filter the registered records by exam time and exam site.

Reschedule an exam for selected registrants

1. From the **Licensed professionals** page, find and open the examination provider.
2. Select the **Examination** tab.
3. Open an examination.
4. Select the **Registered records** tab.
5. Select the check box next to the registrants that need to be rescheduled.

6. Select **Reschedule**.
7. Select a reason for rescheduling and select **Next**
8. Select a new exam session.

Cancel an exam session for selected registrants

1. From the **Licensed professionals** page, find and open the examination provider.
2. Select the **Examination** tab.
3. Open an examination.
4. Select the **Registered records** tab.
5. Select the rosters from which you want to disassociate the exam session.
6. Select **Cancel**.
7. Select a reason and select **Next**.



Note: Civic Platform disassociates the exam session from the license application and removes the license application from the **Registered records** sub-section.

Assign an exam session to multiple registrants

1. From the **Licensed professionals** page, find and open the examination provider.
2. Select the **Examination** tab.
3. Open an examination.
4. Select the **Registered records** tab.
5. Select an exam time and location from the **Time** and the **Site** list menus.
6. Select **Register more**.
7. Enter search criteria as appropriate and select **Submit**.
8. Select the check box next to the records to which you want to assign the exam session.
9. Select **Submit**.

View 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 select an exam item to see the exam sessions and the number of registrants for each exam session. See [Schedule 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.

To view an examination calendar

1. From the **Licensed professional** page, open the desired examination provider record.
2. Select the **Examination** tab.
3. Select **View calendar** in the toolbar.
4. Select **Day**, **Week**, or **Month** to view the exam session information in daily, weekly, or monthly mode.
5. Select one of the exam items.



Note: Civic Platform displays the exam sessions along with the number of the registered rosters for each session at the bottom of the window.

6. Select an exam session to access the **Registered record** page.
7. Select the left or right arrow to move one month back or forward.
8. Select **This month** to locate the current month.
9. You can also search for exam items by specifying examination subject or examination site.

Add examination sites and update scores

Once you create exam locations, you can associate them with exam sessions. To learn how to schedule an exam, see [Schedule an examination](#).

To create an examination site

1. From the **Licensed professionals** page, open the desired examination provider record. See [Add a provider](#) for information on adding an examination provider record.
2. Select the **Examination sites** tab.
3. Select **New**.

- 4. Complete the required fields and others as needed. For a list of field descriptions, see [Examination site fields](#).
- 5. Select **Submit**.

Update 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. From the **Licensed professionals** page, open the desired examination provider record. See [Add a provider](#) for information on adding an examination provider record.
- 2. Select the **Documents** tab.
- 3. Select **New**.
- 4. Attach the score file to the record. See [Attach files](#) for more information on attaching files to records.

 **Note:** Civic Platform uploads the score file to the database.

- 5. Select **Update scores**.

 **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.

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.

 **Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Examination fields

The table below lists and defines fields that may be available as you work with examinations.

Field	Description
Examination Names	Select an examination subject from the drop-down list.
Grading Style	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.
Comments	This field populates when you select an examination subject. You can modify the content as needed.
Status	This field populates when you select an examination subject.
Associated Fee Items	Associate fee items for the examination schedule.
Accept Scheduling Requests in ACA	Indicates whether to an examination subject is available option for public users to select in Accela Citizen Access.
Advance Time (Hours) Required to Schedule/Reschedule/Cancel the Examination	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.

Field	Description
Add Time Period	The exam duration (Start Time and End Time). You can add more Time period by clicking the Add Time Period .
Block Out Days	The specific dates that the provider cannot provide exams.
End Re-occurrence	When the recurring schedule is scheduled to end. If left blank, a schedule repeats indefinitely.
Examination Site	The exam location.
None	Indicates a one-time exam without recurrences.
Repeat every day(s)	Used to generate an exam session every x number of days.
Repeat every week(s)	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.
Repeat every	Used to generate an exam session every X number of months, as well as the day of the

Field	Description
month(s)	month when the exam session is to take place.
Repeat every year(s)	Used to generate an exam session every X number of years,.
Schedule Start Date	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.

Field	Description
Accessibility	Indicates whether the exam location provides disabled accessibility.
Address Line 1	The first line of the exam location.
Address Line 2	The second line of the exam location.
Address Line 3	The third line of the exam location.
Country/Region	The country or region name for the exam location.
City	The city name for the exam location.
Driving Directions	Information on how to drive to the exam location.
Max. Seats	The number of seats that the exam room accommodates.
Phone	The exam center’s contact phone number.
State	The state where the exam is located.
Status	Indicates whether an exam site can be applied to exam schedules or not.
Zip	The zip code for the exam location.

Electronic document review (EDR)

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** page. Users can use the **Global search** page 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.



Note: EDR must be configured by your agency before you can use it. Contact your agency administrator with questions.

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.

Attach 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.

To attach a document to a workflow task

1. Locate the document you want to assign by opening the **Documents** tab for the selected record. You can also use Global Search to locate the document. See [Global search](#) for more information.
2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Select the **Doc review tasks** tab.
4. Select **Assign**.
5. Select the **Workflow task selector**  button to the right of the **Workflow task** field.

6. Select the Workflow Task to which you want to apply the current document.
7. Select **Submit** to save or continue on to assign reviewers. See [Assign a document to one or more reviewers](#).

Assign 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 their comments back to Civic Platform. See [Review documents in Adobe Acrobat Pro](#) for more information.

To assign a document to a reviewer

1. Locate the document that you want to work with. You can search the **Documents** tab for the selected record, the **Sub tasks** tab of the workflow page, or the **Document review tasks** tab on the **My tasks** page. You can also use Global Search to locate a document. See [Global search](#) for more information.
2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Select the **Doc review tasks** tab.
4. Select **Assign**.



Note: Assign the document to a workflow task if not assigned previously. See [Attach a document to a workflow task](#).

5. Do one of the following:
 - Select the **Department selector** button  to the right of the **Department** label, select the check box for the department where the intended reviewer works, and then close the department tree list.
 - Select the **Staff Selector** button  to the right of the **Staff** label, select the individual to whom you want to assign the document review task.
 - Select **Add**.

A **Document review task assign form** row appears with the department or staff you selected. If you selected **Add**, the **Document review task assign form** row is blank.

6. 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.
7. Use the **Page #** and **Comments** column fields to give specific review instructions to the reviewer if needed.

8. To add additional reviewers, repeat steps 5 through 7. You can also select **Add** to add a new **Document review task assign form** row.
9. Select **Submit** to save the assignment.



Note: 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** page for the assigned reviewer.

View and edit document review tasks

You can view and edit review tasks for a document in Civic Platform.

View document review tasks

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 of the workflow page, or the **Document review tasks** tab on the **My tasks** page. You can also use Global Search to locate a document. See [Global search](#) for more information.
2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Select the **Doc review tasks** tab.

Edit 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 that you want to work with. You can search the **Documents** tab for the selected record, the **Sub tasks** tab of the workflow page, or the **Document review tasks** tab on the **My tasks** page. You can also use Global Search to locate a document. See [Global search](#) for more information.
2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.

3. Select the **Doc review tasks** tab.
4. Open the task that you want to edit.
5. Modify the task details as needed.
6. Select **Submit** to save your changes.

Assign and complete document review checklists

You can assign checklists to a document review task. When you finish a checklist item, you can complete that checklist in the **Doc review checklists** tab.

Assign 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. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Assign the document to a document review task if not assigned previously. See [Assign a document to one or more reviewers](#).
4. Select the **Doc review checklists** tab.

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.



Note: The **Doc review checklists** tab may already display checklists, as follows:

- 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 was resubmitted from 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:
 1. Select **Search**.
 2. From the **Group** list, select the group that includes the checklist you want to assign to the document review task.
 3. Select the check box next to the checklists you want to add. To select all checklists, mark the check box that appears at the top of the list.
 4. Select **Submit**.
6. To delete a checklist from the tab, select the checklist and select **Delete**.
7. To add more checklist items to a checklist. Do the following:
 1. Open the checklist to which you want to add checklist items.
 2. Select the **Add** link next to the **Checklist items** heading in the list.
 3. Locate the desired checklist item.

You can choose the checklist group and checklist that contains the checklist item from the lists, or enter the checklist item key word and select the search icon.
 4. Select the desired checklist item, and select **Select**.
 5. You can select the **Delete** link next to the checklist item that you 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 select **Assign**.



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 select **Submit**.

Complete 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. Select the link to the doc review task, and then select 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, select the **Open checklists** button in the Accela Add-on Tools. See [Review documents in Adobe Acrobat Pro](#) for more information.
2. Select the link to the checklist you want to complete.
3. Do the following to update a checklist item:
 1. Select the arrow next to a checklist item to expand the item details.
 2. Complete the fields in the detail section as needed.
 3. Add a comment for the item as needed.
 1. Select the **Standard comment** link to select a standard comment, or manually enter the comment.
 2. 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.

 3. Select the **Sync** link to set up synchronization between the comment in the checklist item and the comment in the document. When you select 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.
4. To upload a file to the checklist item, select the Attachment(s) icon, and follow the procedure for attaching a document as described in [Attach files](#).
5. Update the item status.

4. Repeat the steps for updating a checklist item until you finish updating the checklist.
5. Select the **Submit** button to save the changes.

Review documents in Adobe Acrobat Pro

The **Electronic document review (EDR)** feature allows you to review attached PDF documents in Adobe Acrobat Pro. Documents can be attached to a record, application, and/or a project workflow.



Note: EDR must be configured by your agency before you can use it. Contact your agency administrator with questions.

Attach a document

If your agency uses Citizen Access, you can submit supporting documents as part of a permit application process in Citizen Access. When you submit document files, Civic Platform attaches the files to a record where a permit clerk or similar can interact with them. Citizens can also submit necessary documentation in support of permit applications from the Citizen Access web page.



Example: A clerk may add document attachments that a customer submitted via email, or submitted in hard copy (after the clerk converts to the hard copy to PDF).

In Civic Platform, you can submit supporting documents from the **Documents** tab of a record. You can attach one or more PDF files at a time. For more information on attaching a document in Civic Platform, see [Attach files](#).



Note: Only PDF files are supported when using Electronic Document Review (EDR). Documents that are not PDF can usually be saved, printed, or scanned to PDF. Contact your agency administrator or help desk for more information.

Search for and review a document with Global Search

The **Global search** page 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:

- Select the document name to view the **Document information** window for any listed document.
- Select the **Review** link in the **Review** column to open a document in Adobe Acrobat Pro, where you can comment, annotate, and use stamps.

- Select the record number link to open the record that contains the desired document.

See [Global search](#) for more information.

Open and review a document in adobe acrobat pro

You can launch PDF document attachments for review from Civic Platform into Adobe Acrobat Pro. After you launch a document attachment, you can use the Adobe Acrobat's commenting and annotation tools to mark up documents. After completing your review, use the Accela Toolbar Add-on tools to save your comments to the Civic Platform application server.

You can open a PDF document attachment in Adobe Acrobat Pro from the **Documents** tab of a record, the **My tasks** page, or the **Global search** page.



Note: If you do not see the document or a **Review** option 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 with questions.

From the documents tab

1. Locate and select the record containing the document you want to open.
2. Select the **Documents** tab.
3. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
4. Select **Review**.

From the My Tasks

1. Open the **My tasks** page and select the **Document review tasks** tab.
2. Identify the document you want to open and select the **Doc name** link.
3. Select **Review**.

From the Global Search

1. Search for the document you want using the **Document name**, **Document description**, or **Document category** as your search criteria.
2. In the **Documents** tab of the search results, identify the document you want to open, and select the **Review** link for that row.

The document opens in Adobe Acrobat Pro where you can annotate the document(s) as needed.



Note: Adobe provides full documentation for 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.

The Accela toolbar in Adobe Acrobat Pro

The EDR feature includes an Adobe Acrobat plug-in that has 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.

 **Notes:**

- If you do not see the Accela Adobe Acrobat plug-in toolbar or have other issues with this feature, contact your agency administrator.
- 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 configured by your administrator.
 e-Codes	You can add one or more buttons to your toolbar to launch preconfigured 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.
 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.

Save annotations and comments

You can save any additions to a document during the Electronic Document Review process. Those changes are saved to the Civic Platform application server for others to view. When all reviews are complete, you can then merge the changes 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. Contact your agency administrator with any questions.

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. Select 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. Select 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.

View 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.

To get review comment updates

1. Open a PDF document from Civic Platform using the **Review** link
2. Select 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.

View and edit 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 selected the **Publish comments** button in Adobe Acrobat Pro.

To view and edit a document's comments

1. Locate the document you want to edit on the **Documents** tab for the selected record or on the **Sub tasks** tab of the **Workflow** tab.

You can also use Global Search to locate the document. See [Global search](#) for more information.

2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Select the **Doc review comments** tab.



Note: 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.

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 was resubmitted of an existing document, the comments list of the document includes all the open comments of the existing document. If you open the resubmitted document in Adobe Acrobat Pro, the comments display in the document in the same position as in the previous document.
5. Select 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

Delete 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



Important: Be cautious when deleting comments, because:

- 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.
- Civic Platform does not prompt you to confirm the deletion and this action is irreversible.

To remove one or more review comments

1. Access the **Doc review comments** tab for the desired document as described in [View and edit the document review comments](#).
2. Select each comment you want to delete.
3. Select the **Delete** button.

View the 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 resubmissions.

To view the document review history

1. Locate the document you want to work with by selecting the **Documents** tab for the selected record or by selecting the **Sub tasks** tab on the **Workflow** page of the record.

You can also use Global Search to locate the document. See [Global search](#) for more information.

2. Open the **Document information** dialog by either selecting the document's **File name** or by selecting **Actions > View doc info**.
3. Select the **Doc review history** tab in the left panel.

Enforcement

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.



Example: 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.

Create 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.



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. From the **Enforcement** page, select **New**.
2. Select the enforcement group from the **Group** list menu.
3. Select the type of enforcement application to create from the **Type** list menu.
4. If available, select the **Subtype** and **Category**.



Note: You agency may use **Subtype** and **Category** fields to define the enforcement application you want to create. Contact your agency administrator with any question about this feature.

5. Complete the required fields and others as needed. See [Case application field definitions](#) for field definitions.
6. Select **Submit**.

Add, view, and update evidence for a case

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.



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.

Add evidence

1. From the **Enforcement** page, find and open the case record.
2. Select the **Evidence** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Evidence fields](#) for field definitions.
5. Select **Submit**.

Attach a document as evidence

You can collect document or images and add them to a case as evidence. For more information about uploading and accessing documents, see [Attachments](#).

To attach a document as evidence for a case

1. From the **Enforcement** page, find and open the case record.
2. Select the **Evidence** tab.
3. Choose the **Evidence type** associated with your document.
4. Select the **Documents** tab.
5. Select **New**.
6. Complete the required fields and others as needed. See [Attachment details](#) for field definitions.
7. Select **Submit**.

View and update evidence

1. Open the **Enforcement** page and find and open the case record.
2. Select the **Evidence** tab.
3. Open the evidence record you want to view/update.
4. Complete the required fields and others as needed. See [Evidence fields](#) for field definitions.



Note: If you did not make any changes, select **Cancel** to close the evidence record.

5. Select **Submit**.

View 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

1. Open the **Enforcement** page and find and open the case record.
2. Select the **Evidence** tab.
3. Open the evidence for which you want to view a history.
4. Select the **History** tab.

Change 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 [View evidence history](#).

To change evidence status

- 1. Open the **Enforcement** page and find and open the case record.
- 2. Select the **Evidence** tab.
- 3. Find and open the item from the **Evidence list**.
- 4. Select a **Chain of custody** status from the list menu. See [Chain of custody fields](#) for the options available to you.
- 5. Select **Submit**.

Enforcement (and related) details

The following tables list and define the default fields available when working with enforcement cases and citations.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Case application field definitions

The table shown below lists and defines the default fields available when working with **Case applications**.

Field	Description
Alt ID	An alternate ID used to identify the case application.
Assigned Date	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.
Assigned To Department	The department responsible for the case application.
Assigned to Staff	The individual within a department that is responsible for the application.
Anonymous	Indicates whether the complaint caller elects not to reveal his identity.
Brief Description	A brief description to help identify the case application.
Record Description	A brief description of the case application.
Record ID	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

Field	Description
	create an alternate ID if needed.
Record Name	The name of the enforcement case.
Record Type	The type of application.
Channel Reported	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.
Citation #	The citation number for the case application.
City	The city designation to the primary address associated with the case application.
Closed By	The user that closed the request or complaint.
Closed Date	The date the case application was closed. Click the calendar icon located next to the From and To fields to specify a date range.
Closed Department	The department responsible for closing the Record.
Closed Staff	The individual responsible for the case application.
Contact Email	The email address of the primary contact associated with the case application.
Contact First Name	The first name of the primary contact associated with the case application.
Contact Last Name	The last name of the primary contact associated with the case application.
Contact Middle Name	The middle name of the primary contact associated with the case application.
Contact Relationship	The primary contact's relationship to this case application.
Contact Type	The type of contact associated with the case application, such as "applicant."
Detailed Description	Enter a detailed work description of the case application.
Enforcement Officer Name/ID	The name or ID of the enforcement officer.
Email	The email address of the primary contact associated with the case application.
First Name	The first name of the primary contact associated with the case application.
Last Name	The last name of the primary contact associated with the case application.
Middle Name	The middle name of the primary contact associated with the case application.
Opened Date	The date that Civic Platform created the case application record.
Opened Department	The department responsible for creating the Record.

Field	Description
Opened Staff	The individual responsible for creating the case application.
Organization Name	The primary contact associated with the case application, such as the name of the organization to which the contact belongs.
Owner Name	The primary owner associated with the case application.
Priority	The priority level for the case application.
Reported Date	The date that your agency received the case application.
Reported Time	The time that your agency received the case application.
Reported Type	The type of complaint or incident.
Status	The status of the case application, such as Opened, Closed, and Unassigned.
Sub Type	A more specific classification for the Record.

Citation fields

The table shown below lists and defines the default fields available when working with **Citations**.

Field	Description
Appearance Date	The date that the defendant must appear in court.
Booking	Indicates if there was a booking with the citation.
Citation #	The identification number of the citation.
City	The name of the city where the citation was enforced.
City	The name of the city wherein resides the court that is responsible for hearing the complaint.
Civil Case #	The civil case number corresponding to a citation and a case number.
Comment	Any comments regarding the citation.
Court Address	The address of the court responsible for hearing the complaint.
Court Code	The name or abbreviation of the court responsible for hearing the complaint.
Date	The issued date of the citation.
Defendant Signature	Indicates whether the defendant signed the complaint.
Enforcement Officer	The name of the officer who issued the citation.
Enforcement Officer ID	The identification number of the officer who issued the citation.

Field	Description
Infraction	Indicates whether an infraction took place.
Inspector ID	The identification number of the inspector who discovered or reviewed the violation.
Misdemeanor	Indicates whether a misdemeanor occurred.
Offense Witnessed	Indicates whether there was a witness to the offense.
Phone	The courthouse phone number
State	The name of the state where the violation occurred.
State	The state where the court is located.
Violation Address	The address of the violation.
Violation Location	A description of the location where the violation occurred. A description helps when you cannot provide an address, street name, or building location.
Zip	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.

Field	Description
Birth Date	The birth date of the defendant.
City	The city for the defendant's address.
Country	The country for the defendant's address.
Eye Color	The defendant's eye color.
Gender	The defendant's gender.
Hair Color	The defendants hair color.
Height (feet ' inches ")	The height of the defendant.
ID #	Enter the defendant's official identification number. F
ID (Issue State)	The state that issued an ID number to the defendant.
Name (F/M/L)	The first, middle, and last name of the defendant.
Notes	Any additional comments about the defendant.
Primary Defendant	Indicates whether the defendant is the primary defendant.

Field	Description
Social Security #	The social security number of the defendant.
State	The state for the defendant's address.
Vehicle ID	The defendant's vehicle identification number or license plate number for any vehicle involved in the citation.
Violator Address	The address of the defendant.
Weight (lbs.)	The weight of the defendant in pounds.
Zip	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.

Field	Description
Chain of Custody	The status for the evidence. Only a user with supervisor rights can modify this field.
Comments	An area to provide more information about the evidence.
Date/Time	The time and date of the transaction. Civic Platform automatically provides the information for this field.
Description	A brief description about the evidence.
Disposition	The reason that an item is checked out or locked.
Evidence Type	The type of evidence. Use this as a way to organize evidence.
Location	The current physical location for the evidence.
Record By	The name of the user who last modified the record.
Serial No	The serial number of the evidence item. For example, a serial number for a firearm.
Units	The quantity for the units of measure.
Units of Measure	The form of measurement used to quantify the content. For example, ounces, pounds, inches, feet.
Value	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**.

Field	Description
Checked In	Indicates that the item is checked in at the primary holding location. When adding new evidence to a case, this is the default.
Checked Out	Indicates that the item has moved to a location other than the primary location.
Locked	Indicates that the item is locked and cannot be moved to another holding location.

Inspections

Inspections are an important part of an agency's business. Civic Platform allows you to schedule inspections, create checklists for the inspections, work with inspections including rescheduling, canceling, and transferring, manage inspections, and much more.

Schedule 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).

For more information on other inspection-related tasks, see:

- [Transfer inspections](#)
- [Cancel an inspection](#)
- [Reschedule an inspection](#)
- [Pending inspections](#)
- [Assign an inspector to an inspection](#)
- [Enter inspection results](#)

Schedule an inspection from a record

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 a record

1. From the **Record** page, find and open a record.
2. Select the **Inspections**.
3. Hover over **Manage inspections** and select **Schedule inspections**.
4. Select the inspection group containing the inspection types you want to schedule from the **Inspection group** list.
5. On the **Available inspection types** list, select the inspection types you want to schedule.
6. Select the right arrow button to move the selected inspection types to the **Selected inspection types** list.



Note: 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.

7. Do one of the following:

- To create pending inspections:
 1. Select **Pending inspections**.
 2. Select **OK** to return to the **Inspections** page.
- To schedule an inspection:
 1. Select **Schedule inspections**.
 2. Complete the required fields and others as needed. For a complete list of fields, see [Inspection scheduling and results fields](#).
 3. Select **Submit**.

Schedule an inspection

1. From the **Inspections** page, hover over **Manage inspection** and select **Schedule inspections**.
2. 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 select **Search**.
 - Leave the field blank and then select **Search** to open a page containing additional search criteria you can use to locate the records you need.
 1. Enter search criteria and then select **Submit**.
 2. Select each application record you want to schedule inspections for.
 3. Select **Submit**.



Note: 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.

3. 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** list.
4. Highlight the inspection type(s) you want to schedule.
5. Use the right arrow button to move the selected inspection type(s) to the **Selected inspection types** box.
6. Do one of the following:
 - To request an inspection for an application, select **Pending inspections** and then select **OK**.
 - To schedule an inspection for an application, select **Schedule inspections**, complete fields as needed, and then select **Submit**.

Carry 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 have not been resolved, the new inspection carries over the failed checklist items.

To carry over failed inspection items

1. From the **Record** page, find and open the desired record.
2. Select the **Inspections** tab.
3. Hover over the **Manage inspection** button to display a command menu
4. Select **Schedule inspections**.
5. Complete the required fields and others as needed. See [Inspection scheduling and results fields](#) for field definitions.
6. Select **Submit**.



Note: 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.

7. Select the desired checklist items, then select **Submit**.

View 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. From the **Inspections** page, hover over the **Menu** button to display a command menu, then select **Statistics**.
2. Choose a department, an inspector, schedule date from and schedule date to from the lists.
3. Select **Submit**.

Edit 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. From the desired page, select the **Inspections** tab.
2. Select **Edit flow**.
3. In the **Milestone** field for each inspection type, enter a non-negative integer that represents the checkpoint for that type.
4. Select **Required** or **Optional** to indicate whether an inspector can schedule inspections within the next milestone before completing the current inspection
5. Select **Submit**.

Add 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. From the **Inspection** page, select an inspection link.
2. Select **Look up**.
3. Complete the appropriate fields and select **Submit**.
4. Select the inspection you want to add.
5. Select **Select**.

Display 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 on the Building page to display in or hide from ACA

1. From the **Record** list page, find and open the desired record.
2. Select the **Inspections** tab.
3. Do one of the following:
 - If you have a **Manage inspection** menu in your toolbar, hover 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** menu in your toolbar, select the inspections you want, then select **Display in ACA** or **Hide in ACA**.

Plot an inspections in GIS

Accela 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. From the **Inspections** page, select each inspection that you want to plot on a map.
2. Do one of the following:
 - Select **GIS**.



Note: Civic Platform launches the map viewer with a purple map marker that indicates the scheduled location of the inspection.

- Select **GIS** and select one of the following options:

- **Show Scheduled Location**



Note: 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**



Note: 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.

Copy 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, select the **Checklist** tab and the checklist you want to view. Return to the **Inspection list detail** page by selecting 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 page

1. From the **Inspection** page, find and open the desired record.
2. Select **Select record to copy from**.
3. Search for and select the record you want to copy the inspection from.
4. Select **Submit**



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.

5. When you finish editing the copied inspection, select **Submit**.

Edit 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.

Transfer inspections

You can move inspections from one inspector's queue to another inspector's queue 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.

Transfer 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** page or the **Inspection** tab on the **Record detail** page, the **Calendar** page, or the **My tasks** page, 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 over the **Manage inspections** button and select **Transfer inspections**.
 3. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
 4. Use the bottom two fields to select the department and name of the individual you want to transfer inspection assignments to.
 5. Select **Submit**.



Note: If there are any scheduling time conflicts, you can check the **Alerts** page 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 over the **Manage inspections** button and select **Transfer inspections**.
 3. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
 4. Leave the bottom two fields blank.
 5. Select **Auto assigned to appropriate inspector**.
 6. Select **Submit**.



Note: 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** page for links to the inspections with conflicting times, and manually reschedule those inspections.

Remove all 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** page or the **Inspection** tab on the **Record detail** page, the **Calendar** page, or the **My tasks** page, depending on which view you want.
2. Hover over the **Manage inspections** button and select **Transfer inspections**.
3. Use the top two fields to select the department and name of the individual you want to transfer inspection assignments from.
4. Leave the bottom two fields blank.
5. Clear the **Auto assigned to appropriate inspector** option.
6. Select **Submit**.



Note: 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.

7. Select **OK**.

Transfer 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** page or the **Inspection** tab on the **Record detail** page, the **Calendar** page, or the **My tasks** page, 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 over the **Manage inspections** button and select **Transfer inspections**.
4. 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. Select **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. Select **Submit**.

Unassign 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** page or the **Inspection** tab on the **Record detail** page, the **Calendar** page, or the **My tasks** page, depending on which view you want.
2. From the list of inspections, select the inspections you want to unassign.
3. Hover over the **Manage inspections** button and select **Transfer inspections**.
4. Leave the two fields blank and clear the **Auto assigned to appropriate inspector** option.
5. Select **Submit**.



Note: 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.

6. Select **OK** to proceed.

Cancel an inspection

Inspections need to be canceled 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 canceled and rescheduled as needed.



Note: If you cancel an inspection from a group that is not the default inspection group, the canceled inspection does not affect the inspection workflow.

Cancel an inspection on the Building service or Request page

1. From the **Building** or **Service request** page, find and open the desired record.
2. Select the **Inspections** tab.
3. Select the check box next to each inspection you want to cancel.
4. Hover over the **Manage inspection** button to display a command menu.
5. Select **Cancel inspections**.
6. Select **Submit**.

Cancel an inspection on the Inspections page

1. From the **Inspections** page, select the check box next to the inspection(s) you want to cancel.
2. Hover over the **Manage inspection** button and select **Cancel inspections**.
3. Select **Submit**.

Reschedule 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 through the **Service Request**, **Building Permit**, or **Inspection** pages.



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.

Reschedule an inspection on the Building page

1. On the desired page, select the **Inspections** tab.
2. Select each inspection you want to reschedule.
3. Hover over **Manage inspection** to display a command menu, then select **Reschedule inspections**.
4. Complete the required fields and others as needed. For a list field descriptions, see [Inspection scheduling and results fields](#).
5. Select **Submit**.

Reschedule an inspection on the Inspections page

You can reschedule inspections on the **Inspections** page.

To reschedule an inspection on the Inspections page

1. On the **Inspections** page, select the inspection you want to reschedule.
2. Hover over **Manage inspection** to display a command menu, then select **Reschedule inspections**.
3. Complete the required fields and others as needed. For a list field descriptions, see [Inspection scheduling and results fields](#).
4. Select **Submit**.

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.

Accela Mobile 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 page 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.

Request an inspection from the Building page

You can create a pending inspection from the Building page.

To create a pending inspection from the Record list page

1. On the **Record list** page, find and open the desired record.
2. Select the **Inspections** tab.
3. Hover over the **Manage inspection** button to display a command menu.
4. Select **Schedule inspection**.
5. Select the inspection group from which you want to add pending inspections from the **Inspection Group** list.
6. Select the inspection types you want to add as pending.
7. Select the right arrow to move the inspection types to the **Selected Inspection Types** box.
8. Select **Pending Inspections**.
9. Select **OK**.

Request an inspection on the Inspections page

You can create a pending inspection on the Inspections page.

To create a pending inspection on the Inspections Page

1. On the **Inspections** page, hover over **Manage Inspection** to display a command menu.
2. Select **Schedule Inspections**.
3. Select the inspection group from which you want to add pending inspections from the **Inspection group** list.
4. Select the inspection types you want to add as pending.
5. Select the right arrow to move the inspection types to the **Selected inspection types** box.
6. Select **Pending inspections**.
7. Select **OK**.

Assign an inspector to 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 overlays 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.

Civic Platform allows you to assign and re-assign inspections from both the Inspections and Building modules.

After selecting the application for which to schedule inspections, you can specify when each inspection should occur, and by which inspector. If your agency predefined 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).



Note: You can schedule the date and time now and then assign an inspector later.

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.

Assign an inspection from the Inspection page

1. From the **Inspection** page, select the check box next to the scheduled inspection(s) you want to assign.



Note: If a record has more than one inspection associated with it, you can schedule multiple inspections for that record at the same time.

2. Hover over the **Menu** button and select **Assign inspector**.
3. From the **Assign to department** list, select the department.
4. Select the staff member from the **Assign to staff** list.



Note: If you select the **Current user** link, your user name goes in the **Assign to staff** field, and the associated department field updates to reflect your department.

5. Select **Submit**.

Assign an inspection automatically on the Inspections page

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 on the Inspections page

1. From the **Inspection** page, select **New**.
2. In the **Record ID** column, select the link for the desired record.
3. Select **Auto assign**.
4. Complete the required fields and others as needed.

Field name	Action
Date	Select the date of the inspection.
Requester phone number	Enter the phone number for the person who requested the inspection.
Auto assign	Civic Platform automatically assigns an inspector.

5. Select **Submit**.

Reassign an inspection automatically on the Inspections page

1. From the **Inspection** page, find and open the desired record.
2. In the **Auto assign** column, select the link for the inspection you want to reassign.
3. Complete the required fields and others as needed.

Field name	Action
Date	Select the date of the inspection.
Requester phone number	Enter the phone number for the person who requested the inspection.
Auto assign	Civic Platform automatically assigns an inspector.

4. Select **Submit**.



Note: Civic Platform automatically assigns the inspection to the qualified inspector with the lightest workload.

Assign an inspection automatically from the Service request or Building page

1. From the **Building** or **Service request** page, find and open the desired record.
2. Select the **Inspections** tab.
3. Select **New**.
4. Select **Auto assign**.
5. Complete the required fields and others as needed.

Field name	Action
Date	Select the date of the inspection.
Requester phone number	Enter the phone number for the person who requested the inspection.
Auto assign	Civic Platform automatically assigns an inspector.

6. Select **Submit**.



Note: Civic Platform automatically assigns the inspection to the qualified inspector with the lightest workload.

Reassign an inspection automatically from the Building or Service request page

1. From the **Building** or **Service request** page, find and open the desired record.
2. In the **Auto assign** column, select the link of the inspection you want to reassign.
3. Complete the required fields and others as needed.

Field name	Action
Date	Select the date of the inspection.
Requester phone number	Enter the phone number for the person who requested the inspection.
Auto assign	Civic Platform automatically assigns an inspector.

4. Select **Submit**.

Automatically schedule 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. From the **Inspection** page, from the list of Inspections, select the **Assign by District** link next to the desired inspection.
2. Select **Select** next to the address or parcel you want.
3. Select **Select** next to the inspector you want.

Automatically schedule 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. From the **Inspection** page, select the **Auto assign** link next to the desired inspection.
2. Complete the required fields and others as needed. See [Inspection scheduling and results fields](#) for field definitions.



Notes:



- 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.

3. Select **Auto assign**.
4. Select **Select** next to the inspector you want.
5. Select **Submit**.

Enter 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.



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.



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 completed by an inspector.

Enter 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 **Inspections** list page either from the launchpad or on the **Inspections** tab of a record.
2. Select the desired inspection.
3. Complete the checklist. See [Checklists and route sheets](#) for more information.
4. Do one of the following to access the **Result inspections** page:
 - Hover over **Manage inspection** to display a command menu, then select **Result inspections**.
 - Hover over **Menu** to display a command menu, then select **Result**.
5. Update the available fields.

**Notes:**

- Values entered in the Inspection Date and Inspection Time fields auto-populate the Result Date and Result Time fields.
- 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. Select **Submit**.



Note: Civic Platform displays a summary of the updated inspections, skipped inspections, and failed updates. The inspection list reflects the changes to the inspections.

Edit 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. Find and open the desired inspection, either from the **Inspections** page or on the **Inspections** tab of a record.
2. Do one of the following to access the **Result inspections** page:
 - Hover over **Manage inspection** to display a command menu, then select **Result inspections**.
 - Hover over **Menu** to display a command menu, then select **Result**.
3. Edit the fields as necessary. See [Inspection scheduling and results fields](#) for field definitions.
4. Select **Submit**.

Follow up an inspection

Some agencies elect to configure some inspection types to require follow-up inspections.

To follow up an inspection

1. From the **Inspections** page, select the desired inspection.
2. Hover over **Menu** to display a command menu, then select **Result**.
3. Complete the **Status** and the **Schedule date** fields.
4. Select **Save**.
5. Select the follow-up inspection and select **Submit**.

Checklists and route sheets

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 allows an inspector to organize all of the inspections for which they are currently responsible.

For more information on using checklists and route sheets:

- [Checklists for inspections](#)
- [Route Sheets for inspections](#)

Checklists for inspections

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.

Add 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. Find and open the inspection you are working on.



Note: Inspections are located in the **Inspections** page main link or on the **Inspections** tab for the record you are working with.

2. Select the link for the inspection that you want to update.
3. Select the **Checklists** tab.
4. Select **Search**.
5. From the **Group** drop-down list, choose the group that includes the checklist you want to add to the inspection.
6. Select the check box next to the checklist(s) you want to add. To select all reference checklists, select the box at the top of the list.



Note: You can also enter a Checklist ID. The Checklist ID displays on the checklist detail page when you enter the inspection results.

7. Select **Submit**.

Copy 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.

To copy a checklist to an inspection

1. Locate and open the application to which you want to apply the inspection information.
2. Select the **Inspection** tab.
3. Select the inspection type name you want to view.
4. Select the **Checklist** tab.
5. Hover your mouse over **Menu** and select **Copy**.
6. Search for and select the record with the checklist(s) you want to copy over.
 - Select the record you want and select **Submit**.
7. Select the check box next to the checklists you want to copy.
8. Select **Submit**.

Add 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. Find and open the inspection you are working on.



Note: Inspections are located in the **Inspections** page main link or on the **Inspections** tab for the record you are working with.

2. Open the inspection that you want to update.
3. Select the **Checklist** tab.
4. Open the checklist.
5. Select the **Add** link next to the **Checklist items** heading in the list.
6. Locate the desired checklist item.



Note: If you know that checklist item, choose the **Checklist group** and **Checklist** that contains the checklist item from the drop-down lists. You can also enter the checklist item key word and select the search icon .

7. Select the desired checklist item, and select **Select**.
8. You can remove a checklist item by selecting the **Delete** link next to the checklist item that you newly added to remove the item from the checklist.



Note: You cannot remove a checklist item that your agency administrator configured in the checklist.

Complete a checklist

Completing 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. Find and open the inspection you are working on.



Note: Inspections are located in the **Inspections** page main link or on the **Inspections** tab for the record you are working with.

2. Open the inspection.
3. Select the **Checklists** tab.
4. Open the checklist you want to complete.
5. For each checklist item, select a status.

**Notes:**

- All required items must be completed.
- When you select an item status, the item score auto-populates with a predefined 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.
- If you have no supervisory privileges, your agency administrator may only allow you to modify the checklist item statuses, and. you cannot edit inspection result, inspection grade, checklist total score, and checklist major violation.
- You can select 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.

6. Select **Submit**.

Manage 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

1. Find and open the inspection you are working on.



Note: Inspections are located in the **Inspections** page main link or on the **Inspections** tab for the record you are working with.

2. Select the link for the inspection that you want to update.
3. Select the **Checklist** tab.
4. Select the link for the checklist you want to complete.
5. Expand the desired checklist item, then do one of the following.
 - To associate documents or image files with the checklist item, select 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, select the link to the attachment name.
- To remove an attachment, select the **Delete** icon next to the desired attachment.

Remove 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. Open the inspection.
3. Select the **Checklists** tab.
4. Select the check box next to the checklist that you want to remove.
5. Select **Delete**.

Route Sheets for inspections

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. From the **Inspections** page, select **Route sheet**.
2. Select the relevant department from the **Department** list.
3. Select an inspector from the **Inspector** list. Select **Current user** to populate the field with your user name.
4. Define the date range for the scheduled inspections in the **From** and **To** fields.
5. Select **Filter**.
6. Select the date for which you want to route inspections.
7. Optimize your inspection route.



Note: You can use Accela GIS, or you can use a third party optimizer, if your agency has configured one.

- To use Accela 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. Select **Show route map**. Re-route the inspection list using Accela GIS functions.



Note: If inspections are in numerical order, Accela GIS displays the inspection route in assigned order. If some but not all inspections are in numerical order, Accela 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 GIS optimizes the inspection route by distance and displays the route.

4. Use the Accela GIS **Actions** menu to route the inspection.



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. Select **Order by**, then select an option from the 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.

8. Select **Save**.

Access a checklist item from the inspection documents page

You can access a checklist item from the Documents tab on an inspection record.

To access a checklist item from the Inspection Documents page

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, select the link to the inspection you want.
 - Go to the **Inspection** page. In the **Inspection type** column, select the link to the inspection you want.

2. Select the **Documents** tab.
3. Select the link to the desired checklist item.
4. Update fields as needed.
5. Select **History** to view a history actions for the checklist item.

Apply and delete 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 on the Inspection page.

Apply 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. On the **Inspections** page, select the **Conditions** tab.
2. Complete the fields as described in [Conditions form default fields](#).
3. Select **Submit**.

Change 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. On the **Inspections** page, select the **Conditions** tab.
2. 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.
3. Select **Reorder**.

Delete 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. On the **Inspections** page, select the **Conditions** tab.
2. Select the check box next to the condition you want to remove.
3. Select **Delete**.

Attach documents to an inspection

Users can attach documents and images to an inspection.

 **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](#).

Inspection (and related) details

The following tables list and define the default fields available in the different interfaces you might encounter.

 **Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Inspection scheduling and results fields

The table below lists and defines fields that may be available as you work with Inspection Scheduling and Results.

Field	Description
ACA Role	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.
Address	Enter the inspection address.
Comment Display in ACA	Select to activate the display of inspection comments in Citizen Access. Define who can view the comments in the Citizen Access Role field.
Department	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 Schedule inspections .
Display Comment in ACA	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.
Display in ACA	Select to display the inspection in Citizen Access.
Document Name	Enter the title of the document you are attaching to the inspection.
EDMS Name	Select the Electronic Document Management System from the drop-down menu. This field relates to attaching documents to an inspection. For more information, see Attach documents to an inspection .
End Mileage	Enter the reading from the odometer that displays in the vehicle after you complete the inspection.
End Time	Enter the time when you finished the inspection.
File Name	Enter the fully qualified path or click Browse to locate the file on your computer. The document size may be up to 16MB.
Inspection Contact Name	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.
Inspection Contact Phone Number	Enter the phone number of the person who requests the inspection.
Inspection Date	Use the calendar icon to choose the date when you complete the inspection.
Inspection Grade	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.
Inspection Score	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.
Inspection	The sequence number automatically assigned when Civic Platform creates an

Field	Description
Sequence Number	inspection. Sequence numbers are unique and incremental. Inspection reports can display the inspections in the order that they occur.
Inspection Time	Displays the current time. Use the drop-down lists to choose a different time and indicate whether the time is AM or PM.
Inspection Type	The type of inspection selected for scheduling.
Inspector	Use the drop-down list to choose the inspector within the department responsible for completing the inspection. If you are responsible for opening the inspection, click the Current User 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 Schedule inspections .
Latitude	When using a GPS device, enter the latitudinal coordinates.
Longitude	When using a GPS device, enter the longitudinal coordinates.
Record Comment	Displays the comments that have the Apply to Inspections check box selected in the Comments tab of the associated record. 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.
Record ID	The unique identification number of the record ID requiring this inspection. If you click the link at a Record ID, a window pops up displaying the details for the record.
Record Type	Choose the type of record that requires an inspection.
Request Comment	Enter comments about the new inspection. You may identify who requested the inspection, or any other important details.
Request Date	Date when Civic Platform automatically schedules and submits a new inspection.
Requestor	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.
Requestor Phone Number	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.
Request Time	Civic Platform automatically generates a value for this field when a user schedules and submits a new inspection.

Field	Description
Required/Optional	Use the drop-down list to set the inspection as required or optional.
Result Comment	Enter inspection result comments. You can also click the Selection icon to choose from a list of standard comments.
Scheduled Date	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." If you are resulting an inspection, this field is read-only and displays the inspection scheduled date.
Scheduled Time	Displays the current time. Use the drop-down lists to choose a different time and indicate whether the time is AM or PM.
Scheduled Start Time	Use the drop-down list to set an inspection start time.
Scheduled Start Time AM/PM	Use the drop-down list to set the AM or PM of the inspection start time.  Note: 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.
Scheduled End Time	Use this optional drop-down list to set an inspection end time.
Scheduled End Time AM/PM	Use the drop-down list to set the AM or PM of the inspection end time.  Note: 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.
Start Mileage	Enter the mileage from the odometer before you travel to a new inspection site.
Start Time	Enter the time when you started the inspection.
Status	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.
Submit Date	Automatically generated when you schedule and submit a new inspection.
Submit Time	Automatically generated when you schedule and submit a new inspection.

Field	Description
Total Mileage	Enter the total number of miles required. This value does not calculate automatically.
Total Time	Enter the total number of hours required to complete the inspection.
Vehicle ID	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.
Unit #	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.

Field	Description
Address	The record address for the inspection.
Alternate ID	The alternate identification number for the inspection.
Estimated End Time	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.
Estimated Start Time	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.
Filter	Click this button to filter the inspection list based on the criteria entered in the Department , Inspector , and Scheduled Date fields.
Inspection Count	The number of inspections scheduled each day.
Inspection Type	The type of inspection, such as Rough Grade, Plumbing, or Electrical.
Order	The inspection order in which Civic Platform schedules the inspections. Enter up to four integers in this field.
Record ID	The record identification number for the inspection.
Request Comment	Comments entered when the requestor created the inspection.

Field	Description
Scheduled Date	The date of the inspection.
Scheduled End Time	The projected end time for the inspection.
Scheduled Time	The projected start time for the inspection.
Show Route Map	Click this button to view or update an inspection route using Civic Platform GIS.
Status	The status of the inspection, such as Scheduled or Result Pending.
Unit Nbr	The number of inspection type units required to complete the inspection.

Licensed Professionals

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.

Add a licensed professional

You can add new licensed professionals as needed. After you add a professional, they are available to associate with records. See [Associate licensed professionals to a record](#) for more information.

To add a professional

1. From the **License professionals** page, select **New**.
2. Complete the required fields and others as needed. See [Licensed professional details](#) 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.

3. Select **Submit**.

Associate licensed professionals to a record

You can associate and disassociate licensed professionals to/from a record from the actual record and the **License professionals** page.

View associated records from the license professionals page

You can view associated records as needed from the **License professionals** page.

To view an application or a service request from the license professionals page

1. From the **License professionals** page, find and open the professional you want to work with.
2. Select the **Associated record list** tab.
3. Open the record that you want to view and/or edit.

Associate or disassociate records from the license professionals page

You can associate or disassociate records with a professional from the **License professionals** page.

To associate records with a professional

1. From the **License professionals** page, find and open the professional you want to work with.
2. Select the **Associated record list** tab.
3. Select **Look Up**, enter search criteria, and select **Submit**.
4. Select the check box next to the record(s) that you want to associate or disassociate.
5. Do one of the following:
 - To associate the record(s) with the current licensed professional, select **Select**.



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 [Delete records](#).

- To disassociate the record(s) from a professional profile, select **Delete**.



Note: Citizen Access users cannot view disassociated records for a licensed professional.

View licensed professional information from a record

You can view associated professionals as needed from a record.

To view licensed professional information from a record

1. From the **Record** page, find and open the record you want.
2. Select the **Professionals** tab.
3. Open the professional you want to view.
4. You can edit a professional's data. Select **Submit** to save your changes.



Note: Modifications apply only to the current record. Reference professional data is not updated. To modify reference professional data, work from the **Licensed professionals** page.

Associate professionals from a record

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. You can edit the data as needed; however, changes are not made to the original reference professional record (See [Edit information about a reference professional](#) for information).

To associate a professional to a record

1. From the **Record** page, find and open the record you want to work with.
2. Select the **Professionals** tab.
3. Find the professional(s) you want to associate.
4. Select the check box next to the professionals and select **Select**.
5. Select **Submit**.

Edit information about a reference professional

You can modify the reference professional data as needed.



Note: Your changes do not apply to existing records currently associated with the professional. However, new records will reflect the changes.

To edit information about a reference professional

1. From the **License professionals** page, find and open the professional record you want to modify.
2. Modify the fields as needed. See [Licensed professional details](#) for field definitions.
3. Select **Submit**.

Add a new professional from a record

You can add new professionals to a record via the **Professionals** tab of a record.



Note: Civic Platform does not store professionals added from this location in the reference database. To add a new professional to your reference database, see [Add a licensed professional](#).

To add a new professional to a Record

1. From the **Records** page, find and open the record you want to work with.
2. Select the **Professionals** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Licensed professional details](#) for field definitions.
5. Select **Submit**.

Disassociate a professional from a record

You can disassociate a professional from an application or a service request as needed. This also removes the association to the record from the **License professionals** page.

To disassociate a professional from a record

1. From the **Record** page, find and open the record you want to work with.
2. Select the **Professionals** tab.
3. Select the check box next to the professional(s) you want to disassociate.
4. Select **Delete**.

Manage public users associated with a professional

You can directly associate a public user with a licensed professional in the licensed professional page, and view or edit the public details.

To manage the association between a licensed professional and a public user

1. From the **Licensed professionals** page, find and open the licensed professional you want to work with.
2. Select the **Associated public user** tab.
3. Do any of the following:
 - To associate a public user with the current licensed professional:
 1. Select **Look Up**, enter your search criteria, and select **Submit**.
 2. Select the check box next to the public user you want to associate with.
 3. Select **Connect**.
 - To view and edit a public user associated with the licensed professional.

1. Select the **Email** field of the public user you want to work with.
 2. Update any fields as necessary.
 3. Select **Save**.
- To remove the association of a public user with the licensed professional.
 1. Select the check box next to the public user from which you want to dissociate.
 2. Select **Delete**.

Manage attachments associated with a professional

Use the **Documents** tab on a licensed professional record to manage all associated attachments. For more information about working with attachments, see [Look 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: After you add a document from a licensed professional to one or more records, you cannot delete the documents from the **Licensed professional** page.

To download multiple documents, select the documents and select **Manage documents > Download**.



Note: Your agency administrator needs to configure the correct permissions to enable you to download multiple documents. Contact them with any questions about your permissions.

To print multiple documents, choose the documents and select **Manage documents > Print**.



Note: The **Print** option only displays if configured by your agency administrator.

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. From the **Licensed professional** page, find and open the licensed professional you want to work with.
2. Select the **Documents** tab.
3. Select the CSV file that an external inspector uploaded and you have reviewed.
4. Select **Result inspections**.



Note: 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**. Citizen Access may display an announcement of the update completion to the external inspector if configured to do so. If any inspections fail to update, Civic Platform generates a log file that lists all the failed inspections.

Licensed professional details

The table below lists and defines fields that may be available as you work with Licensed Professionals.

 **Important:** Because your Civic Platform installation has been configured to meet your agency’s specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Field	Description
Address	The address information for the licensed professional. You may have up to three lines of address information.
Business License #	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.
Business License Expiration Date	The date when the business license is due to expire.
Business Name 1	The primary name of the business associated with the professional license.
Business Name 2	The secondary business name in the text field, if applicable.
Contractor Business Name	The contractor business name.
Contractor License Number	The license number of the contractor.
Comp Insurance Company Code	The code associated with the worker’s compensation insurance provider for the professional.
City	The city name. You can use the Get City button to choose a city from a list.
Comment	Any comments about the business license or professional.
Display in ACA	Indicates whether to display the professional record in Citizen Access.
Display Inspection in the past # of Days	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. 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

Field	Description
	inspections that occurred in any of these three days display in the Previous Inspection section for that food facility license in Citizen Access.
Email	The email address of the licensed professional.
Fax #	The fax number of the licensed professional.
FEIN	If applicable, enter the federal employer identification number of the licensed professional.
First Name	The first name of the licensed professional.
Insurance Amount	The cost, in dollar amounts, of the professional's insurance policy.
Insurance Company	The name of the company that insures the professional.
Insurance Expiration Date	The date when the insurance policy is due to expire. Click the calendar icon to locate the date using a calendar.
Last Name	The last name of the licensed professional.
License State	Choose the state where the professional business license was issued.
License Expiration Date	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.
License Issue Date	The issue date of the state license. Click the calendar icon to use a calendar to locate the date.
License Last Renewal Date	The last renewal date for the state license. Click the calendar icon if you want to use a calendar to locate the date.
License Type	Choose the type of license held by the professional; for example, Architect, Plumber, or Provider.
Licensing Board	Choose the licensing board. For example, the Louisiana State Licensing Board for Contractors.
Middle Name	The middle name of the licensed professional.
Phone	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.
Policy #	The insurance policy number of the licensed professional.
SSN	The social security number of the licensed professional.
State	The state where the mailing address is located.
State License #	The official number that identifies the business license as issued by the state and held by the professional.
Status	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.
Title	The title of the licensed professional.

Field	Description
Workers Comp Exempt	The workers' compensation exemption status.
Workers Comp Expiration Date	The expiration date of the workers' compensation insurance policy.
Workers Comp Policy #	The workers' compensation insurance policy number.
Zip	The zip code of the licensed professional.

Licenses

You can use Civic Platform to handle a variety of different types of licenses.



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.



Notes:

- If your agency uses the PERMITS Plus permitting system, your agency administrator can configure certain Civic Platform list pages 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.
- The **Licenses** page needs to be configured by your agency. If you have questions, contact your agency administrator.

Renew a license

You can view license renewal information and/or renew a license from either the **Renewal info** or **Workflow** tabs.

View 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. From the **Record** page, open the license you want to modify.
2. Select the **Renewal info** tab.
3. Review the fields described in [Renewal information fields](#).

Renew 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.

You 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 **Renew a license by workflow** below.

To renew a license

1. From the **Record** page, open the license you want to renew.
2. Verify the status of the license on the **Renewal info** tab, if necessary.
3. Select the **Renewal** tab.
4. Select **Renew**.



Notes:

- The **Renew** button displays only when a license expires, nears expiration, or is delinquent.
- If the license cannot be renewed and the supervisor override feature is enabled, a prompt displays that allows a supervisor to override the blocked renewal. If a supervisor authorizes an override by entering their username, password, and an override reason, the renewal process continues. For details about the supervisor override, see [Supervisor override](#).

5. Enter data as available. For field definitions, see [Renewal information fields](#).
6. Select **Submit**.

Renew a license by workflow

You 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. From the **Record** page, open the license you want to renew.
2. Select the **Workflow** tab.
3. Select the folder associated with the workflow task that you want to update.
4. Select an option from the **New status** field. For a list of options, see [Renewal workflow new status options](#).
5. Select **Submit**.
6. Update the **New status** fields for each workflow task folder as needed.

Modify license details

You can modify the license renewal information for the record.

To edit license details

1. From the **Record** page, open the license you want to modify.
2. Select the **Record** tab.
3. Modify the desired fields. For a list of field descriptions, see [License details](#).
4. Select **Submit** to save your changes.

Modify application specific information

You can modify information that is specific to a particular license application as needed.



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 application specific information

1. From the **Record** page, open the application you want to modify.
2. Select the **Record** tab.
3. Modify data as needed.
4. Select **Submit** to save your changes.

Add or remove license contacts

You may need to change contacts associated with a license. For example, a subcontractor may relocate his office, or replace employees, or you may add a homeowner so you can apprise him about the progress of the project. You can modify license contact details through the **Contacts** tab of the license record.

Add a contact to a license

1. From the **Record** page, open the license you want to modify.
2. Select the **Contacts** tab.
3. Select **Manage contacts > New..**
4. Complete the fields with available data. See [Contact details](#) for field definitions.
5. Select **Submit..**

Remove a contact from a license

1. From the **Record** page, open the license you want to modify.
2. Select the **Contacts** tab.
3. Select each contact you want to delete.
4. Select **Manage contacts > Remove.**

Modify 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 [Renew a license](#).

Modify education information

Education information includes details about degrees, majors, and educational institutions attended.

To modify education information

1. From the **Licenses** page, find and open the license you want to modify.
2. Select the **Education** tab.
3. Modify the existing information as necessary:
 - To insert a new row, select **Add**. For information on completing the form fields, refer to [Record application intake form sections](#).
 - To delete a row, select the line that you want to remove and then select **Delete**.
4. When you finish making your changes, select **Submit**.

Modify 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 re-certification 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. From the **Licenses** page, find and open the license you want to modify.
2. Select the **Continuing education** tab.
3. Modify the existing information as necessary
 - To insert a new row, select **Add**. For information on completing the form fields, refer to [Record application intake form sections](#).
 - Select the row to remove, then select **Delete**.
4. Select **Submit**.

Modify 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 select 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. From the **Licenses** page, find and open the license you want to modify.
2. Select the **Examination** tab.
3. Modify the existing information, as necessary
 - To add a new exam session, select **Add**. For information on completing the form fields, see [Record application intake form sections](#).
 - To change to another exam session, select 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.

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, select 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 select **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, select **Submit**.

Civic Platform updates the record with your changes.

5. Select **View Log** to view changes to the exam schedules. See [Audit logs](#) for more information.

Pay a license fee

When payment is received for a license fee, you can apply the payment to the license.



Note: Depending on your agency's business practices and user permissions, you may not be able to apply payments to license fees. Contact your agency administrator if you have questions.

To pay a license fee

1. From the **Record** page, open the license you want to modify.
2. Select the **Payment** tab.
3. Select **Pay**.
4. Make any needed modifications to prepopulated fields and complete other fields as needed. See [License details](#) for field definitions.
5. Select **Save**.
6. If you applied a partial payment, enter the correct amount in the **Amount** field, and then select **Submit**.



Note: Civic Platform displays a receipt in a popup window. You can use your browser's print function to print the receipt.

Associate PERMITS Plus APDs to a record

If your agency uses the PERMITS Plus permitting system, your administrator can configure some list pages 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 select the PERMITS Plus APD link to launch the PERMITS Plus system.

Associate 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. Find and open the existing record you want to associate with an APD.
2. Select the **Related records** tab.
3. Select **Look up**.
4. In the **Data source** field list menu, choose **P+ - Permit Plus**.

5. Complete other search fields as needed.
6. Select **Submit**.



Note: Civic Platform returns a list of PERMITS Plus APDs that match your search criteria.

7. Select the check box next to the APD you want to associate.
8. Do one of the following:
 - Select **Select as parent** to set it as the parent of the current application.
 - Select **Select as child** to set it as the child of the current application.

Remove a related PERMITS Plus APD

1. Find and open the existing record you want to associate to an APD.
2. Select the **Related records** tab.



Note: You can identify APDs by the symbol [P+].

3. Select the check box next to each PERMITS Plus APD you are removing.
4. Select **Delete**.

Search for a PERMITS Plus APD

If your agency subscribes to PERMITS Plus, you can search for an APD from the Civic Platform **Building permits** page. Select an APD hyperlink to launch PERMITS Plus and open the selected record.

To search for a PERMITS Plus APD

1. From the **Service requests** or **Building permit** page, select **Search**.
2. Select **P+ - Permit Plus** from the **Data source** field list menu.
3. Enter any other search criteria as desired.
4. Select **Submit**.
5. To view an application or a service request, select the name link.

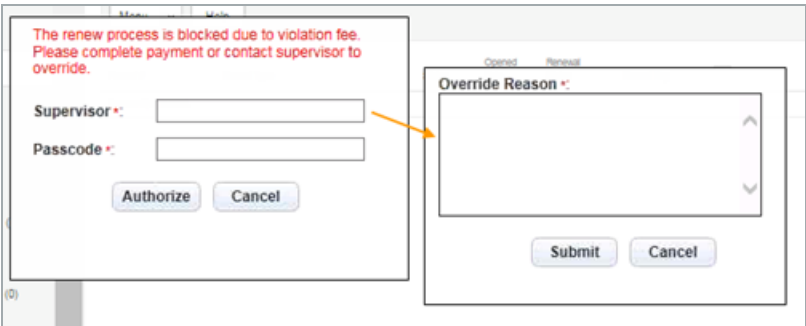
Supervisor override

Civic Platform's license renewal process prevents citizens from renewing licenses when they have outstanding fees. Supervisors can override this restriction if needed.

**Example:** A citizen comes to the agency to renew a license but is unable to because of outstanding fees. If the citizen pays the fees and provides proof of payment, a supervisor can override the restriction and authorize the renewal of the license.

**Note:** Supervisor override is only available when your agency enables it. Contact your agency administrator if you have questions about your agency's policy regarding supervisor overrides.

Once the proper configuration is in place, if an application or license to be renewed has unpaid fees, Civic Platform shows a prompt similar to the following when a cashier selects the **Renew** button:



To override the renewal error, a user with the supervisor role enters a username and password, selects **Authorize**, and enters an override reason. When the supervisor selects **Submit**, the renewal process is unblocked.

License details

The following tables list and define the default fields available in the different interfaces you might encounter when you work with licensing.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

License details

The following table lists and defines fields that you may see on the License details portlet.

Field	Description
Alternate ID	An alternate ID for the Record. Many agencies use a shortened form of the Record ID number.
Brief Description	A brief description that helps you to identify this license.

Field	Description
Record ID	The number used to identify a license. This number generates this automatically. You cannot modify this number.
Record Name	The name of the license.
Record Type	The type of license. The type may be a concatenation of module, type, sub-type, and category.
Detailed Description	A detailed work description for this license.
Expiration Date	The date the license expires.
Expiration Status	The status of the license (for example, about to expire, delinquent, active).
Status	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.
Status Group	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.

Field	Description
Expiration Code	This is the code, set by your agency and agency administrator, that identifies the license renewal process.
Expiration Date	The expiration date of the license that Civic Platform automatically assigned when it created the license.
Expiration Interval	Indicates how often the license expires.
Expiration Status	Shows the current status of the license. Status may include: pending, expired, delinquent, or active.
Grace Period Interval	Indicates the length of the grace period after the license expires.
Number of Penalty Periods	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.
Pay Period	The pay period group for this renewal process. Any fees assessed for licenses with this

Field	Description
Group	renewal process come from this pay period group.
Penalty Fee Code	This identifies the fee code used to calculate the penalty fee associated with the license.
Penalty Fee Function	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.
Penalty Interval	Indicates the length of each penalty period related to the license.
Renewal Fee Code	This code identifies the fee item used to calculate the renewal fee.
Renewal Fee Function	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.

Field	Description
Accepted	An application review is complete; the information is acceptable.
Accepted/ No Review	The renewal is approved without a review of the renewal information.
Approved	The application has been reviewed; the information is acceptable.
Denied	The license cannot be reviewed. For example, the business did not pass an inspection.
Issued	The renewal has been accepted and the license issued.
On Hold	The renewal is postponed but not rejected. For example, the administrator needs to verify the payment information.
In Process	The renewal is in the process of completing the associated task.
Not Issued	The renewal has been accepted, but the license has not been issue.
Not Required	The step is not needed to renew the license.
Pending	The renewal is postponed but not rejected. For example, the administrator needs to verify the payment information.
Ready to move to next task.	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.

Field	Description
Address 1	The street address for the contact.
City	The city where the contact is located.
Country	The country the contact is located.
Email	The email address for the contact.
Fax	The fax number for the contact.
First Name	The first name of the contact.
Last Name	The last name of the contact.
Notes	Any additional notes that identify the contact.
Organization Name	The name of the organization the contact is affiliated with.
Phone 1	The primary phone number for the contact.
Phone 2	The secondary phone number for the contact.
Preferred Channel	The communication method that the contact prefers. For example, if a contacts prefers to be contacted via email, select "email."
Relationship	The contact's relationship to the license.
State	The state where the contact is located from the drop-down list.
Type	The contact type.
Zip	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.

Field	Description
Amount	The payment amount.
CC Auth Code	The three digit authorization number located on back of the credit card.
CC Exp Date	The expiration date of the credit card being used for the payment.
CC Holder	The name of the credit card holder

Field	Description
Name	
Comment	Comments pertaining to the payment.
Method	The payment method. For example, cash, credit card, debit card, check, or money order.
Payee	The person who is paying the fee.
Reference #	The reference number associated with the payment. For example, a check number or the last four digits of a credit card.

Maps

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 geocentric information.

Map dashboard

The **Map dashboard** displays a graphical rendition of records, including addresses, parcels, inspections, and more. From this dashboard, you can view records, create records, search for records, and attach assets to records.

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



Note: The Map dashboard is only available if configured by your agency administrator.

Open the Map dashboard

1. On the main menu bar, select the dashboard toggle .
2. Select the **Map** icon .

Advanced search

When you open the Map dashboard, **Advanced search** displays on the left side of the map.



Note: Select the arrow on the right of the Advanced search panel to hide it. Select the arrow again to reopen it.

To perform an advanced search

1. From the **Type** menu, select the type of search you want to perform.



Note: In the filter field that appears at the top of the list, you can type part or all of a search type to filter the list.

2. On the form that appears, complete the desired fields.
3. Select **Show results**.

Map options

The following options appear on the right side and bottom of the map.

Options	Description
Zoom	Allows you to zoom in and out on the map. You can also zoom in by double-clicking, or zoom in and out by using a mouse wheel. Pan the map by holding down your mouse button on a spot and dragging the mouse.
Home	Displays the default view, or the initial area shown on the map. The default view is configured by the administrator of the map service provider.
Locate me	Finds your current location according to your browser.
Basemap	Allows you to choose the type of basemap.
Layers	Allows you to view GIS map layers.
Measure	Allows you to select the unit of measure for an area, distance, or the geographic longitude/latitude location to measure on the map.
Draw	Allows you to add a line, shape, or text to the map.
Print	Allows you to print the map to a PDF or another selected format.
MultiSelect	Allows you to select a specific area on the map by drawing a line or shape.
Heat map	By default, locations are plotted on the map with pins. Select Heat map to show locations using gradient hotspots. Select Heat map again to return to pin view.
Map scale	Shows the ratio of measurement on a map compared to the actual distance. The scale and unit of measurement are provided by the map service.
Map legend	Shows an explanation of the map symbols as provided by the map service.

Navigate map panels

When you select multiple objects on the Map dashboard, a panel displays listing the selected objects, 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.

Navigation arrows

You can return to a previous view or close the panel:

- The left-facing arrow  returns you to a previous view.
- The x in the upper right corner closes the panel.

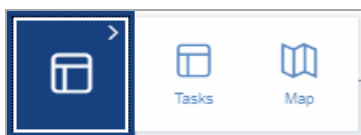
 **Note:** If you close a panel, any selected objects are deselected.

Toggle between dashboards

The dashboard toggle, located at the top of the main menu bar, lets you switch between the Map and Task dashboards.

To toggle between dashboards

1. At the top of the main menu bar, select the dashboard toggle .
2. Select either the **Tasks** or **Map** icon.



Create a route sheet

A route sheet helps inspectors organize inspections. It also displays inspection routes on the map, enabling inspectors to minimize the time and distance traveled. Inspectors can view their scheduled inspections, order them according to their preference, add a stop to their route, and view their route on the map.

Create a route sheet from the Inspection page

1. From the **Inspections** page, select **Route sheet**.
2. From the **Department** list, select the relevant department.
3. From the **Inspector** list, select an inspector.



Note: You can select **Current user** to select yourself.

4. (Optional) In the **From** and **To** fields, enter a date range that includes the desired inspection, and then select **Filter**.



Note: Enter dates in DD/MM/YYYY format. You can also select the calendar icons to enter dates in the required format.

5. In the list of inspections, select the option button next to the desired inspection.
6. (Optional) Enter values in the **Order** fields to define a preferred order for the inspections.



Note: If you do not enter order values, Civic Platform uses the default order.

7. Select **Show a route map**.

Create a route sheet from the inspection search results

1. Do one of the following:
 - From the **Map dashboard**:
 - a. From the **Type** list, select **Inspections**.
 - b. In the search fields, enter the information needed to find the desired inspection(s). See [Advanced search on a map](#) for more information.
 - c. From the search results, select the inspections to add to the route sheet.
 - From the **Inspections** page:
 - a. Plot the inspections on the map.
2. Select **Actions > Route**.

Edit the Route Sheet

These Accela GIS functions are available from the route sheet:

- Select **Add stop** to add a stop to the inspection route.
- Drag a stop to change its order on the route sheet.
- Select the **Delete** icon to remove a stop on the inspection route.

Advanced search on a map

Use the Accela GIS **Advanced search** to locate Accela objects (for example, inspections and records) and GIS Features. The GIS Features available for search are provided by the Esri integration and include map layers such as assets, easements, streets, zoning details, and all of the other map layers supported by Esri.



Note: GIS search results are accumulated. The recent search results are appended to the existing search results. All results can also be selected.

To use Accela GIS advanced search

1. From the **Map** dashboard, select the **Advanced search Type** field.
2. Select the type of search you want to perform.
3. Enter search criteria into the search fields as necessary.

4. Select **Show results**.

The search displays the search results in a **Results** tab and pins the object(s) on the map.

From the search **Results** tab, you can perform a variety of actions on the objects returned in a search. See [Map actions](#) for more information.

Find 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 list. You can select an item from the list or finish typing the complete address and press **Enter** (or select the **Search** icon). Civic Platform GIS zooms to the selected location. Select **X** to clear the Finder and start another search.

Find 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 select the parcel to see the GIS information and action panel.

Select a location on the Civic Platform map

When a user selects a place on the map, JavaScript GIS searches the Civic Platform database for GIS objects on the selected location.



If multiple GIS objects are found on the selected 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 selected location:
 - The parcel is highlighted, and the GIS information and action panel is displayed.
 - If the user selects 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 selected location, the geocoding address is used and the parcel associated with the geocoding address is shown.
- If an address is not found on the selected location, only the x-y coordinates are shown.

- The x-y coordinates on the selected 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.

Navigate to a bookmarked or browser location

To navigate to a bookmark or your current browser's saved location, select 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 actions

Accela GIS allows you to perform map-based transactions using the available actions from the menus 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. These menus become enabled after items are selected or searched on the map.

Performing actions on map items

1. Do one of the following:

Search for the desired object type (for example, an inspection, a record, or a GIS Feature) on the **Map** dashboard and select the check boxes next to the item on which to perform the action.

See [Advanced search on a map](#) for more information.

or

Select an area on the map.

2. Select **Actions** to view and select the actions you want to perform.



Note: The available actions vary based on the type of search performed or the type of items plotted on the map.

3. **Common available actions**

- **Create new record** - Opens a new record page with the selected items.
- **Create an inspection** - Opens the inspection scheduling form for the selected items.
- **Create a work order** - Opens the new work order page with the selected items.
- **Show document** - Opens the document list for the selected items.
- **Buffer selection** - Selects GIS objects within a specified radius distance from the selected parcels.
- **Remove selected** - Removes the currently selected parcel(s) or record(s) from the search results.
- **Route** - Retrieves the necessary route for all the selected items.
- **Export a CSV file** - Exports selected parcel and asset information into a CSV file.

Plot items on the map

While browsing various pages, you can select items on the list and plot them on the map. It is also possible to plot items by using the [Advanced search on a map](#) tab on the Map dashboard.

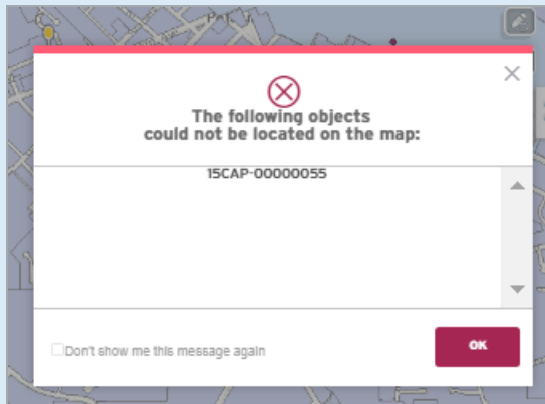
In this example we are searching for Records. You can also search for inspections and GIS Features. To plot records on the map:

1. From the **Records** page, select the check box next to the records you want to plot.
2. Select **GIS**.

The selected records display on the Search **Results** tab with the map plots parcels, assets, and addresses attached to the selected records.



- For each selected item, the map plots any associated parcels, assets, and GIS objects. If a record has multiple addresses, the primary address is plotted.
- If there is no address-parcel relationship, the address is plotted based on the X-Y coordinate. If 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.
- 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.
- The GIS feature highlighted for each item is based on the link ID field stored in the AGIS_Object table.
- Select items and select **New** or **More** to perform one of the [Map actions](#).
- Select an item link to see the details associated. To go back to the plotted map, select the current associated workspace icon. For example, if you were searching for parcels, select the Parcel icon on the Main Menu bar.
- If any of the selected items 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 items. Example:



3. To return to the **Records** page, select **Back to records**.

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** option allows you to set the visible and selectable attributes of the map layers.

Visible and selectable map attributes

The **Layers**  option displays the various map services and layers on the map. When you click the **Layers** option for the first time, the option displays the map services you have access to, and whether those services are visible or selectable.



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 option 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:



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** option, a user can:

- Expand or collapse the hierarchical list of map services and map layers.
- Toggle the **VISIBLE** option 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 option is disabled. When the user zooms into a visible scale, the map layer along with the VISIBLE and SELECTABLE options become enabled.

- Deselecting the VISIBLE option for a *map service* hides all of its map layers. However, changing the VISIBLE option for a map service (or a parent map layer) does not change the VISIBLE option of the children map layers.

The **VISIBLE** option 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 unselect/reselect at least 20 options.)

- Deselecting the **VISIBLE** option automatically deselects the **SELECTABLE** option. A map service or layer is selectable *only* if it is visible.
- Selecting the **VISIBLE** option again does not automatically reselect the **SELECTABLE** option because a visible layer is not necessarily selectable. A user must explicitly make a map layer selectable.
- Toggle the **SELECTABLE** option to allow or disallow GIS object selection on the map service or layer.
 - Unselecting the **SELECTABLE** option for a map service unselects all of its map layers. However, changing the **SELECTABLE** option for a map service (or a parent map layer) does not change the **SELECTABLE** options of the children map layers.

The **SELECTABLE** option 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 unselect/reselect at least 20 options.)

- If the **VISIBLE** option is unselected or a map layer is not visible at the current zoom level, the **SELECTABLE** option is disabled.
- Move the **Opacity** slider under a map service to adjust its opacity (100%) or transparency (0%).
- 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. Contact your agency administrator with questions.

Editing a layer

The layer editing tool opens a selected map layer in an edit layer session during which you 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 you have permissions to edit the map layer. The following sample Layers option shows  next to the **Parks** map layer, which is visible and editable by you, if you are logged-in.

To edit a layer, click the  icon next to the map layer. The edit layer session displays the **Edit Layer** toolbar, **Layers** option, and **Edit GIS Object** panel.

The edit layer session disables the search box, selection tool, zoom control, and the other map options. 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.

Print a map

To print a map, select 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:

Option	Description
Map title	The map title appears at the top of the page. The maximum number of characters is 85.
Layout	The page size and orientation.
Format	The file format to export to: PDF, EPS, JPG, PNG 8-bit, PNG 32-bit, SVG, and SVGZ (compressed).
Advanced > Map scale/extent	Choose either the current map scale, default map extent, or a forced scale. Select the Current scale link to determine the current map scale number and adjust it as needed.
Advanced > Layout metadata	The author and copyright information. In addition, select the Include legend check box to display the map legend.
Advanced > MAP_ONLY size	The width and height (in pixels) dimensions of the map.
Advanced > Print quality	The DPI (dots per inch) number to specify the print resolution.

Create inspections using the map

From the map dashboard, inspectors can select parcels or addresses on the map, select records, and schedule inspections. Accela GIS also allows you to create multiple inspections on multiple records in the same transaction.

To create inspections from a map

1. Open the **Map** dashboard.
2. Open the **Layers** option and verify that the **Parcel** layer is selectable.
3. Find the parcels for inspection. See [Advanced search on a map](#) for more information.
4. On the **Results** tab, scroll to the **Records** list to select the check box next to the records to be inspected



Note: The check-box is disabled for closed records.

5. After selecting the records, select **Actions** > **Create an inspection**.



Note: The **Actions** menu is disabled until a record is selected and activates after selecting a record.

6. On the **Inspections** window, enter the inspection parameters (such as inspection type), and select **Schedule inspections**:
7. Review the inspection details, edit as necessary, and select **Submit** to schedule the inspection:
8. Select **OK** on the confirmation window:

Import parcels from GIS to a set

In Civic Platform, you can use **GIS import** to locate parcels on a map and add them to a set.

To import parcels from GIS

1. From the **Sets** page, select the **Parcels** tab.
2. Open the parcel set to which to add parcels from GIS.
3. Select the **Set member** tab and select **GIS import**.
4. When the map opens, use the zoom, pan, or search bar to locate the parcels 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 to zoom out to a level where 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 selected GIS objects.

6. Select the **GIS objects** tab to adjust the selection.
7. After finishing selection on the **GIS objects** tab, select the **Send GIS feature** command from the context menu.



Notes:



- 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 multiple GIS parcels are selected, the **Reference parcel list** window displays the associated reference parcels. If there is only one GIS parcel selected, this window does not display.
- The **Send GIS Feature** action currently only works with parcel sets.

8. If selecting multiple GIS parcels that have multiple reference parcels, select the parcels to be added to the set from the **Reference parcel list**, and click **Select**:
9. Click **OK**. The map stays open in case of locating and adding more parcels to the set.

After completing selection, click the Back arrow on the map to go back to the **Set members** list

10. The **Set members** list shows the newly added reference parcels.

Model maintenance

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.



Example: 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.

Create 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. From the **Modeling maintenance** page, select **New**.
2. Complete the required fields with available data. See [Model detail fields](#) for field definitions.
3. Select **Save**.



Notes:

- Add variations as necessary. See [Create and delete variations with models](#).
- Add a model record for the model. See [Create a model record](#).

Delete 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. Open the **Modeling maintenance** page.
2. Select the check box next to the models you want to delete.
3. Select **Delete**.

Create a model record

To create a model record

1. From the **Model maintenance** page, find and open the model you want.
2. Select **Model record**.
3. Create the record. See [Create a new record](#) for more information.
4. Update the information for the model record.



Note: You may need to supply application information, address information, owner information, application specific information, and other information depending on the application type. Since this is the model, leave fields blank that will have different information for each application based on the model. See [Model main page fields](#) for field definitions.

5. Select **Submit**.

Create and delete variations with models

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.



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.

After creating a model variation, you can add choices to that variation. See the following pages for more information:

-
-

Create 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. See [and](#) for more information.

To create a variation

1. Open the **Modeling maintenance** page.
2. Create a new model or open the model with which you want to work. See [Create a new model](#) for more information.
3. Select the **Variations** tab.
4. Select **New**.
5. Complete the required fields and others as needed. See [Variation details](#) for field definitions.
6. Select **Submit**.
7. Update variation details as described in .

Delete 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. Open the **Modeling maintenance** page.
2. Create a new model or open the model with which you want to work. See [Create a new model](#) for more information.
3. Select the **Variations** tab.
4. Select the check box next to the variation you want to delete.
5. Select **Delete**.

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.

Field	Description
Active	Indicates if a model active or disabled.
Allow Others to Modify	Indicates whether other users (other than the creator) can make changes to a model.
Allow Others to Use	Indicates whether other people within your agency can create applications using this model.
Category	The category of the model record.
Created By	The user who created the model.
Created Date	The model creation date.
Detailed Description	A description of the model. The description may include specifics that help to identify the model and set it apart from similar models.
Group	The group from the model record.
Maximum Init Count	This number defines how many applications a user can create from the model at any one time.
Name	The name for the model.
Subtype	The subtype from the model record.
Title	The title for your model.
Type	The type from the model record.

Model main page fields

The following table lists and defines the available fields (listed in alphabetical order) on the Modeling main page.

Field	Description
Category	The category from the model record.
Group	The group from the model record.
Location Option	A suitable location for the modeling record. Options include: No Prompting: Civic Platform does not prompt a window and directly creates a model record. Prompt for Address: Civic Platform searches for an existing address and associate

Field	Description
	itwith the model record.
	Prompt for Parcel: Civic Platform searches for an existing parcel and associate it with the model record.
	Use Current Parcel Owner: Defines whether to use the current parcel owner information.
Maximum Init Count	This number limits how many applications you can create from the model at any one time.
Quantity to Initialize	This is the quantity you want to initialize for your model.
Set Membership Option	Select Set Membership information.
Status	The status of the model.
Subtype	The subtype from the model record.
Type	The type from the model record.

Variation details

The following table lists and defines the available fields (listed in alphabetical order) for Variation.

Field	Description
Active	Defines whether the variation is available for use.
Allow Multiple Choice	Defines whether to allow a user to choose one or more options for a singe 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.
Display Order	This defines the display order of variations. 1 is first in the display order.
Variation Name	A name for the variation.

Choice occupancy details

The following table lists and defines the available fields (listed in alphabetical order) for Choice Occupancy.

Field	Description
Adjust/Set	Defines whether to adjust or set the square footage or the count. For example, a variation

Field	Description
	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.
Display Order	This defines the display order of occupancy choices.
Occupancy	Displays the occupancy that you chose when you created the variation choice occupancy. Use the valuation calculator to establish the occupancy options.
Qty	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.
Sqft/Count	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.
Unit	Displays the unit that coincides with the variation choice occupancy. Use the valuation calculator to establish the units.
Unit Type	Displays the unit type that you chose when you created the variation choice occupancy. Use the valuation calculator to establish the unit types.

My tasks page

The **My tasks** page provides you with access to workflow tasks, document review tasks, and/or inspections that have been assigned to you.

This page 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.

When you review tasks on the **My tasks** page, it helps you understand what your workload is for a given time period. This allows you to better prioritize your time and reassign tasks if needed.

Setting the display order of tabs on my tasks

When the **My tasks** page 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** page.

To set the tab display order

1. From the **My tasks** page, select **Menu > Display order**.
2. Enter **1** for the tab you want to display first. Enter **2** for the tab you want to display second.
3. Select **Save**.

Filter and search on the my tasks page

You can filter the contents for any or all of the tabs on your **My tasks** page.

To filter tasks and inspections

1. From the **My tasks** page, select the **My task searching** link in the top left-hand corner of the page.
2. 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 tasks fields](#).
3. Select **Submit**.

Reset filters for my tasks page lists

After applying filters, you can reset the **My tasks** page to the original listing display.

To reset the my tasks display

1. From the **My tasks** page, select the **My task searching** link in the top left-hand corner of the page.
2. Select **Reset**.
3. Select **Submit**.

Manage inspections in my tasks

You can view and manage inspections from the **Inspections** tab in the **My tasks** page. 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 page, such as scheduling and rescheduling inspections. For more information about managing inspections, see [Inspections](#).

The benefit of the **Inspections** tab in the **My tasks** page 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.

 **Example:** 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** list, choosing the **Assigned** option in the **Assigned status** list, and selecting the current day. Civic Platform filters the inspections and workflow tasks to display only those assigned to John Q Smith.

 **Note:** This option is set by your agency. If you do not see the **Inspections** tab in the **My tasks** page, contact your agency administrator.

Manage document review in my tasks

You can access documents assigned to you to review from the **Document review tasks** tab on the **My tasks** page. 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** page. For information about document review, see [Electronic document review \(EDR\)](#). For additional information about working with attachments, see [Attachments](#).

My tasks fields

The following table lists the fields you can use to filter the Workflow Tasks and Inspection lists on your **My tasks** page. Fields are in alphabetical order by group.

Field	Description
GENERAL	
Alternate ID	Filter by alternate record ID (for agencies that use a numbering scheme different from Record ID (xxxxx-xx-xxxxx)).

Field	Description
Assigned to Department	Filter tasks and inspections by department. Select Current Department to auto-populate the field with your name.
Assigned to Staff	Filter by responsible individual within a department. Select Current User to auto-populate the field with your name.
City	Filter by the city where the primary address is located.
County	Filter by the county where the primary address is located.
Direction	Filter by street direction. For example, N for north, as in North Broadway.
Record ID	Filter by unique record ID.
Record Type	Filter by record type.
State	Filter by the state where the primary address is located.
Street	Filter by street name (primary address associated with the record). This field supports wildcard searches.
Street # (start) - Street # (end)	Filter by a range of street numbers.
Street Type	Filter by street type, such as Street, Boulevard, or Lane.
WORKFLOW TASK	
Action By (Dept.)	Filter by the department that last updated the task status.
Action by (Staff)	Filter by the individual who last updated the task status.
Assigned Date	Filter by the date when the task assignment was made or changed.
Assign Status	Filter by assignment status.
Due Date	Filter by the due date for the task. You can specify a date range by using both the To and From fields.
Duration (Days)	Filter by the estimated number of days to complete this task.
Module Name	Filter by the module to which the task is related.
Parent Task	Filter by parent task (if any tasks in your current task list are sub-tasks of a parent).
Status	Filter by task status.
Status Date	Filter by the date when the task status last changed.
Task	Filter by task name.
INSPECTION	
AM/PM	Use in combination with Schedule Time to filter by inspection time.
Billable	Filter by inspections that are billable to the client.
Created by ACA	Filter inspections created via Citizen Access.

Field	Description
GIS Area	Filter by geographic area of the inspection.
Inspection Date	Filter by the date when inspections were completed.
Inspection Sequence Number	Filter by a unique inspection sequence number
Inspection Type	Filter by the type of inspection.
Latitude	Filter by the latitudinal coordinates of the inspection site.
Longitude	Filter by the longitudinal coordinates of the inspection site.
Mileage (Start) Mileage (End)	Filter by the starting/ending mileage on the odometer when travelling to an inspection site.
Mileage (Total)	Filter by the total number of miles required for an inspection.
Request Date	Filter by the date inspections were scheduled and submitted.
Scheduled Date	Filter by scheduled inspection date.
Scheduled Time	Use in combination with AM/PM to filter by inspection time.
Status	Filter by the current status of an inspection.
Submit Date	Filter by the date an inspection is submitted.
Total Time	Filter by the total number of hours required to complete an inspection.
Vehicle ID	Filter by the Vehicle ID number of the vehicle used to complete the inspection.
DOCUMENT REVIEW	
Doc Name	Filter by the name of the document.
Category	Filter by document category.
Document Status	Filter by the status for the document.
Document Status Date	Filter by the last date the document status was updated.
Review Status	Filter by the review status for the document.
Review Status Date	Filter by the last date the review status was updated.
Reviewer	Filter by the name of the assigned reviewer.
Review Department	Filter by the department where the assigned reviewer works.
Task	Filter by the workflow task name to which the document is attached.
Task Status	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.

Field	Description
Action By (Department)	The name of the department that last updated the task status.
Action By (Staff)	The name of the individual who last updated the task status.
Address	The physical (street) address associated with the task.
Application-Specific Information	The Application-Specific Information (ASI) group associated to the task.
Assigned Date	The date when the task assignment was made or changed.
Assigned To (Department)	The department responsible for completing the current task.
Assigned To (User)	The user responsible for completing the current task.
Assigned To (Staff)	The individual currently responsible for completing the task.
Comments	Comments about the current status. Agencies with a second language configured will see a comments box for each language.
Comment Display in ACA	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.
Current Status	The current status of the task.
Display E-mail Address in ACA	Indicates whether or not public users can view an agency employee’s email address from ACA.
Due Date	The date by which the task should be completed.
Duration (Days)	The estimated number of days necessary to complete a task. Your agency administrator defines this value.
Estimated Hours	The estimated hours necessary to complete this task. Your agency administrator determines this value. Only supervisors have the privilege to edit this value.
Parent Task	If the current task is a sub-task, this is a description of the parent task.
Record Assigned to Department	The department to which the record is assigned.
Record Assigned to Staff	The staff member to whom the record is assigned.

Field	Description
Record By	The person or department responsible for updating the task status.
Record ID	The unique ID number assigned to the record to which the task belongs.
Record Status	The status of the record.
Record Type	The type of record to which the task belongs.
Short Notes	A brief description of the record.
Status Date	The date when the task reached its current status.
Task Name	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.

Field	Description
Comments	Comments about an ad hoc task.
Days Active	The number of days from the start date of the task to the current date of an active task.
Department	The department responsible for completing this task.
Due Date	The date that the task is to be completed.
Duration (Days)	The estimated number of days necessary to complete this task.
Estimated Hours	The estimated hours necessary to complete this task. Once saved, only supervisors have the privilege to edit the value.
Staff	The staff member responsible for this task.
Task Description	A description of the ad hoc task that corresponds with the task name.
Task Name	The name of the ad hoc task.

Filter an ASI group field

You can create a query that filters **Application-specific information (ASI)** group fields in the **My tasks** page. Filters 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 [Filters](#) for more information.



Note: Before you create an ASI group filter, 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. From the **My tasks** page, hover over **Menu** and choose **My filters**.
- 2. Select **New**.
- 3. Complete these fields as required:

Field	Description
Name	Identifies the filter.
Description	A description that defines the purpose of the filter.
Primary	Defines whether a filter is the primary query for the list page. A primary filter is applied to the list page automatically each time you navigate to it. Only one filter can be primary at any given time. If one filter is designated as the primary, all other queries automatically reset to No for this field.

- 4. In the **Search by** section, select application specific info from the list menu or select the **Data picker** button to the right.

The screenshot shows the 'Search By' section of a software interface. It includes a search bar with a dropdown menu set to 'ASI Group Code'. A 'Data picker' button is visible to the right. Below the search bar is a 'Resulting Query' section. The dropdown menu is open, showing a tree structure with 'ASI Field' selected.

- 5. Select the ASI Group you want to use in your query.

This screenshot shows the same 'Search By' interface as the previous one, but with the 'ASI Group Code' dropdown menu now set to 'AMS_STANDARD'. The tree structure below it shows 'ASI Field' expanded, with 'WORK ORDER DETAILS' selected, and 'Work Type' and 'Planned Start Date' listed as sub-items.

- 6. Select a field from one of the subgroups.

 **Note:** You can select only one field at a time.

Civic Platform adds the field to the query, along with additional fields.

- 7. Enter the desired value for the ASI field.



Notes:

- 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**.

8. When you query an ASI field, it is best practice to refine your search further.



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:

Field	Description
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.

For more information on adding fields to your query, see [Filters](#).

9. Select **Submit**.

Part inventory

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.



Example: 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 the way your agency administrator set up Civic Platform, including access permissions assigned to your Accela User Name. Contact your agency administrator with questions.

Add, edit, and delete parts from part inventory



Note: 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](#).

Add 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 [Create, update, view, and void part transactions](#).

To add a new part to the part inventory

1. From the **Part Inventory** page, select **New**.
2. Enter the part number first, then enter the **Units of measure** and **Calculate type**.
3. Complete the remaining fields in the part details. See [Part inventory fields](#) for a description of fields.
4. Select **Submit**.

Edit 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.

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. From the **Part Inventory** page, find and open the part you want to edit.
2. Update any of the fields that display. See [Part inventory fields](#) for a description of fields.
3. Select **Submit**.

Delete 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 select **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 select **Delete**.

To delete a part from the part inventory

1. From the **Part Inventory** page, find and select the check box next to the parts that you want to remove from the inventory.
2. Select **Delete**.

Link, view, and delete part contacts

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.



Note: For information on how to set up a new part contact, please contact your system administrator.

Link a part contact to a part

1. From the **Part inventory** page, find and open the part with which you want to work.
2. Select the **Part contact** tab.
3. Select **Look Up** to search for contacts, enter search criteria, and select **Submit**. For a description of the fields, see [Part contact fields](#).
4. Select the check boxes next to the contacts that you want to link to the selected part.
5. Select **Submit**.

View 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 page. For information about updating the details of a part contact, see your system administrator.

To view the details of a part contact

1. From the **Part inventory** page, find and open the part with which you want to work.
2. Select the **Part contact** tab.
3. Open the part contact that you want to view.

Delete 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. From the **Part inventory** page, find and open the part with which you want to work.
2. Select the **Part contact** tab.
3. Select the check box next to the part contacts that you want to dissociate.
4. Select **Delete**.

Create, update, view, and void part transactions

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.

Create a part transaction

To create a part transaction

1. From the **Part inventory** page, find and open the desired part.
2. Select the **Part transaction** tab.
3. Select **New**.
4. Complete the required fields and others as needed. Some fields populate automatically with part detail information. For a description of the fields, see [Part supply fields](#).
5. Select **Submit**.

Void 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. From the **Part inventory** page, find and open the desired part.
2. Select the **Part transaction** tab.
3. Select the part transaction that you want to void.
4. Select **Void**.

View 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. From the **Part inventory** page, find and open the desired part.
2. Select the **Part supply** tab.
3. To view the part supply details, select the location you want to review.

Issue 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. From the **Part inventory** page, find and open the desired part.
2. Select the **Part transaction** tab.
3. Select **New**.
4. Select an issue transaction type from the list.
5. Complete the **Location name** and **Quantity** fields.
6. Select the reservation you want to issue from the list of open reservations. The list includes all hard and soft reservations that are open.
7. Select **Submit**.

Update 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. From the **Part inventory** page, find and open the desired part.
2. Select the **Part transaction** tab.
3. Select the link for the reserve transaction you want to update. It must be an open reserve transaction.
4. Use the **Hard reservation** menu to change the reservation type.
5. Select **Save**.

Create and void work order parts transactions

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.



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 [Add standard parts](#). For information about associating parts to an asset, see [Add, view, and delete associated parts to an asset](#).

Create work order part transactions

You can create single or multiple work order part transactions as needed.

To create a work order part transaction

1. From the **Work orders** page, open the work order.
2. Select the **Part** tab.
3. Find and select the check box next to the part(s) that you want to issue to the selected work order.
4. Select **Submit**.

Void 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 [Add, edit, and delete parts from part inventory](#).

To void a work order part

1. From the **Work orders** page, open the work order.
2. Select the **Part** tab.
3. Select the check box next to each part that you want to void.
4. Select **Void**.

Parts (and Related) Details

The following tables list and define the default fields available in the different interfaces you may encounter.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Part contact fields

The following table lists and defines the default fields on the Part Contact form.

Field	Description
Address 1	The first line of the contact's address.
Address 2	The second line of the contact's address, if needed.
Business Name	The business name for the contact.

Field	Description
City	The name of the city for the contact.
Comments	Comments about the contact.
Contact Flag	This contact flag identifies the type of contact: Manufacturer or Vendor.
Contact Last Name	The last name of the contact.
Contact Middle Name	The middle name of the contact.
Contact Title	The title of the contact.
Contact Type	The contact type.
Email	The email address for the contact.
Fax	The fax number for the contact.
Phone	The phone number for the contact.
State	The name of the state for the contact.
Terms	Terms associated with any contact arrangement.
Zip Code	The zip code for the contact.

Part inventory fields

The following table defines the default fields on the Part Inventory.

Field	Description
Budget Account	The budget account for tracking the transactions of the part. The Standard Choice BUDGET_ACCOUNT defines the account options in the list.
Budget Number	The budget number of the budget account that you select for the part.
Calculate Type	The formula for calculating the average cost of a part. There are four available calculation formulas: 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 formula provides the average value of the existing average cost and the cost per unit of the current shipment. Weighted Average: This is the same as the Simple Average, but weighted by quantity. “Weighted 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. FIFO: 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

Field	Description
	parts in the inventory from the oldest supply in stock.
	LIFO: 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.
	 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.
Comments	Any comments associated with the part.
Hard Reserve	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.
Maximum Quantity	The maximum quantity of a part at its corresponding stock location.
Minimum Quantity	The minimum quantity of a part at its corresponding stock location.
Original Part ID	The vendor or manufacturer's original part number (optional).
Part Brand	The brand of the part. For example, Vavoline is the brand for motor oil.
Part Description	The description of the part.
Part Number	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.
Part Status	The status of the part.
Part Type	The type of part. Examples: Fittings, Fleet, Materials.
Reorder Due	Indicates whether the total supply is greater or lesser than the minimum quantity.
Reorder Quantity	The reorder amount for the part. 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.
Reserved Quantity	The reserved quantity. 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.
Taxable	Indicates whether or not the part is taxable.
Track Cost by Location	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.

Field	Description
	If you do not select this option, the part detail price sets to zero, and you must update the unit cost for future transactions.
Total Supply	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.
Unit Cost	The unit cost of the part. If enabled, you may enter a range when searching.
Unit of Measure	The unit of measure for the part. Examples: each, gallon, foot.

Part transaction fields

The following table defines the default fields on Part Transactions.

Field	Description
Alt ID	An alternate ID for the part.
Budget Account	Read-only field. Displays the budget account of the part.
Budget Number	Read-only field. Displays the budget number of the part.
Comments	Any comments associated with the transaction.
Hard Reservation	Indicates if you want to guarantee your reservation, and subtract your order from the quantity on hand.
Location Name	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.
Part Bin	The part bin in the transaction.
Part Brand	The brand name for the part.
Part Description	The description for the part in the transaction.
Part Number	The number of the part in the transaction.
Part Type	The type of the part.
Quantity	The quantity of parts for the transaction.
Record ID	The Record ID in the transaction.
Reservation	This field is available only for the Issue transaction. Select the reservation that you want

Field	Description
	to apply from the drop-down list.
Reservation Comments	Comments on the reserve transaction to help verify that you selected the correct reserve transaction.
Taxable	Indicates whether or not the transaction is taxable.
Transaction Cost	The cost of the transaction.
Transaction Date	The date of the transaction.
Transaction Type	The transaction type: Issue: Parts taken out of stock and issued to a work order. Receive: Parts received from a shipment or a purchase order. Transfer: Parts transferred from one location to another. Adjust: Manually created transaction to update part information or adjust the quantity on hand. Reserve: Parts reserved for issue at a later date.
Transfer to Location	The location that the parts are to be transferred to for the transaction.
Unit Cost	The unit cost for the part in the transaction.
Unit of Measurement	The unit of measurement.
Work Order ID	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.

Field	Description
Comments	Any comments associated with the location
Location Name	The name of the location of the supply.
Part Bin 2	The part bin number for the supply.
Quantity on Hand	The total quantity on hand for the location.
Quantity on Hold	The total quantity on hold for the location.

Field	Description
Quantity on Order	The total quantity that is on order for the location.
Record Status	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.

Field	Description
Calculate Type	The type of calculation that you want Civic Platform to use when it calculates the average cost of the part. Options include Simple Average ((current shipment cost + existing avg cost)/2) Weighted Average ((current shipment cost*shipment quantity)+(existing avg cost*existing quantity))/total part quantity FIFO (first in, first out) When you perform transactions, the oldest inventory is processed first. LIFO (last in, first out) When you perform transactions, the newest inventory is processed first.  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.
Comments	Comments about the part.
Maximum Quantity	The maximum quantity of the part.
Minimum Quantity	The minimum quantity of the part (used to determine when to order parts).
Original Part ID	The vendor or manufacturer's original part number (optional).
Part Brand	The brand of the part.
Part Description	A description of the part.
Part Number	The number used to identify the part in the parts inventory list.
Part Status	The status of the part.
Part Type	The type of part. Example: Fittings, Fleet, Materials.

Field	Description
Reorder Due	If Yes, the total supply is greater than the minimum quantity. If No, the total supply is less than the minimum quantity.
Reorder Quantity	The quantity needed for the reorder.
Taxable	Indicates whether or not the part is taxable.
Total Supply	The total quantity on hand for a selected part displays in this field. This read-only field updates automatically based on part inventory
Unit of Measure	The unit of measure for the part. Example: Hours, Miles.
Work Order Task	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.

PM schedules

Civic Platform makes it easy to stay on top of preventative maintenance (PM) for any piece of equipment, asset, or vehicle. 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.



Example: 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.

Create 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. From the **PM schedule** page, select **New**.
2. Complete the required fields and others as needed. See [Preventative maintenance schedule fields](#) for a list of fields and field definitions.
3. Select **Save**.

Search for a PM schedule

To search for a preventative maintenance (PM) schedule

1. From the **PM Schedule** page, select **Search**.
2. Enter search criteria as needed to locate the PM schedule for which you are searching.
3. Select **Submit**.

Update PM schedule details

You can modify preventative maintenance (PM) schedule details.

To update a PM schedule

1. From the **PM schedule** page, find and open the PM schedule you want to update.
2. Update the fields as needed. See [Preventative maintenance schedule fields](#) for a list of fields and field definitions.
3. Select **Save**.

Group updates for PM schedules

You can edit or update multiple Preventative Maintenance Schedules (PM Schedules) 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 perform a group update on PM schedules

1. From the **PM schedules** page, select a PM Schedule that contains the details you want to apply to other PM Schedules.
2. Select the **PM schedule** tab, update any details as appropriate, and select **Save**.
3. Return to the **PM schedules** page and select the other PM schedules that you want to update with the same details.
4. Go to **Menu > Group update**.
5. Edit the PM schedule with the new values.
6. Click **Save**.

Delete a PM schedule

When you delete a preventative maintenance (PM) schedule, Civic Platform removes it from the schedule log. Work orders no longer generate.

To delete a PM schedule

1. From the **PM schedule** page, find the PM schedules you want to delete.
2. Select the check box next to each PM schedule you want to delete.
3. Select **Delete**.

Hold PM schedules

Civic Platform enables agencies to put a preventative maintenance (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. From the **PM schedule** page, select the **Hold event** tab.
2. Select **New**.
3. Enter the **Hold from** and **Hold to** dates to indicate when the PM schedule should not execute.
4. Select an option from the Recurring list menu to configure the event as a one time event or an annual event.
5. Select **Submit**.

Find and link assets to PM schedules

You must link an asset to a preventative maintenance (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.

Execute 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. From the **PM schedules** page, find and open the schedule you want to work with.
2. Select the **Linked asset query** tab.
3. Select a query type from the **Query type** menu list.
 - **Quick query** allows you to execute a predefined quick query for assets.
 - **Spatial query** allows you to specify a GIS object on the Accela GIS map, and perform a spatial search around the GIS object for assets.
4. Quick query:

1. Update these fields as needed:



Note: The available global quick queries are configured by your agency administrator. Contact your agency administrator if you have questions.

Field	Description
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. Spatial query:

1. Select the **GIS** button.
2. 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.
3. Select the **Actions** button on the **Contents** panel, and select the **Link object to PM schedule** command.



Note: The Accela GIS map viewer closes. The information about the selected GIS object populates in the GIS Layer, GIS Service, and GIS ID fields.

4. Specify the criteria that the spatial query uses to look for assets.

Field	Description
Asset Group	Specify the asset group. The spatial query only looks for the assets that belong to the asset group.
Asset Type	Specify the asset type. The spatial query only looks for the assets that belong to the asset type.  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.
Buffer Distance	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

Field	Description
	area.
Buffer Unit	Specify the unit used for the buffer distance.
GIS Layer	Read-only field. Shows the GIS layer of the specified GIS object.
GIS Service	Read-only field. Shows the GIS service that provides the specified GIS object.
GIS ID	Read-only field. Shows the GIS ID of the specified GIS object.
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.  If you configure both quick query and spacial query, only one query type can select the option "Replace Existing Linked Assets."
Status	The status of the spatial query criteria. You can set it to active or inactive.

6. Select **Save** to save the quick query or spatial to the PM schedule.



Note: You can also select **Reset** to clean up the changes you made in the previous step.

7. Select the **Execute** button to add the query results to linked assets.



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.

Add 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. From the **PM schedule** page, find and open the schedule you want to work with.
2. Select the **Linked assets** tab.
3. Select **Look Up**, enter search criteria, and select **Submit**.
4. Select the check box next to the asset(s) you want to link to the PM schedule.
5. Select **Select**.

Skip assets on PM schedules

Agencies can identify asset exceptions (skipped assets) when they link assets to a preventative maintenance (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. From the **PM schedule** page, find and open the schedule you want to work with.
2. Select the **Skipped asset** tab.
3. Select **Lookup**, enter search criteria, and select **Submit**.
4. Select the check box next to the assets you want to skip.
5. Select **Select**.

Link addresses to PM schedules

You can link a preventative maintenance (PM) schedule to one or more street addresses. 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. From the **PM schedule** page, find and open the schedule you want to work with.
2. Select the **Linked address** tab.
3. Select **Lookup**, enter your search criteria, and select **Submit**.
4. Select the check box next to the addresses that you want to link to the PM schedule.
5. Select **Select**.

Generate 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. From the **PM schedule** page, find and open the PM schedule from which you want to generate work orders.
2. Select **Generate**.
3. Enter the **Through date**.
4. 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.
5. Select **Preview**.



You can see descriptions of the fields that appear on this report by selecting [Summary fields in the preview summary report](#).

6. Review the report to verify that the PM schedules listed are correct.
7. Select **Generate**.
8. Select **OK**.
9. Select **Complete**.

Civic Platform generates the work orders from the selected PM schedule(s) and returns to the PM schedules list page.

Update PM schedules from a work order

Some users can modify maintenance schedule details from the **Work order** page, depending on individual user privileges (see your agency administrator for information about your user privileges).

To update a work order PM schedule

1. From the **Work order** page, find and open the work order that you want to update.
2. Select the **PM schedule** tab.
3. Update any of the fields that apply. For a description of the fields, see [Preventative maintenance schedule fields](#).



- Based on your user privileges, you may not be able to edit the maintenance schedule details.
- 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.”

4. If you modified any fields, select **Submit**.

PM schedule execution history

An execution event occurs when you use a preventative maintenance (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. You can also search or filter the log to see only the execution events you want to see.

To view a log of execution events

1. From the **PM schedules** page, find and open the desired PM schedule.
2. Select the **PM schedule log** tab.
3. To display only specific execution events from the log, do one of the following:
 - Select **Search**, enter the desired search criteria, and select **Submit**.
 - From the **My Filters** list, select the desired filter. For more information on how to use filters, see [Filters](#).

View PM schedules for an asset

You can view the preventative maintenance (PM) tasks scheduled for an asset. For example, you might want to know when the last maintenance task occurred.

To view PM schedules for an asset

1. From the **Assets** page, find and open the desired asset.
2. Select the **PM schedules** tab.

PM schedule details

The following tables list and define the default fields you may encounter when working with preventative maintenance (PM) schedules.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Preventative maintenance schedule fields

The table below lists and defines the default fields available when working with PM schedules.

Field	Description
Comments	Enter any comments associated with the maintenance schedule.
Generate single work order for all addresses	Select this option to create a work order for each asset address linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all addresses. This box is not active if the Include Addresses in Asset's Work Order option is enabled.
Generate single work order for all assets	Select this option to create a work order for each asset linked to this PM schedule. Otherwise, the PM schedule creates a single work order for all assets.
Generate work orders for child assets up to n level(s)	Select this option to create work orders for s and their child assets up to three levels.
Generate work order if previous one opened	Select this option to allow the PM schedule to create a work order for an asset that has a previous work order still open.
Include addresses in asset's work order	Select this option to include the addresses linked to the preventative maintenance schedule in asset work orders created by the schedule.
Include child assets in parent item's work order	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.
Link asset addresses to work orders	Select this option to show an asset's addresses in work orders created for that asset.

Field	Description
Log ID	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.
Next schedule date	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.
Primary only	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.
Record status	Indicates the status of the record.
Schedule ID	This read-only field displays the auto-generated sequence number of the PM schedule.
Schedule name	Enter a unique name for the schedule.
Schedule status	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.
Start date	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.
Template	The name of work order template used for the schedule.
Time interval	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.
Trigger by	Indicates when the next PM schedule should begin. There are three available values in this drop-down list: Scheduled Date: 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. WO Completed Date: Select this value if you want the next PM schedule to begin based on the completion of the prior work order. WO Closed Date: Select this value if you want the next PM schedule to begin based on the closing date of the prior work order.
Usage interval	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.

Field	Description
Schedule name	The PM schedule name.
Work orders	The number of work orders generated successfully from the PM schedule.
Linked assets	The number of assets in the s tab of the PM schedule.
Skipped assets (user setting)	The number of assets in the Skipped Assets tab of the PM schedule. Civic Platform does not generate work orders for these assets.
Skipped assets (open previous work order)	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.
Skipped assets (hold event)	The number of linked assets that the PM schedule should not execute based on existing hold events in the Hold Event tab.
Skipped assets (not due to generate work order)	If the Through Date of the PM schedule that you specify in Enter the Through date. 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).
Total skipped assets	This field is the sum of all the skipped assets.
Linked addresses	This field counts the number of addresses in the Linked Addresses tab of the PM schedule.
Skipped addresses (open previous work order)	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.

Field	Description
Skipped addresses (not due to generate work order)	This field displays the number of linked addresses. If the Through Date of the PM schedule that you specify in Enter the Through date. is earlier than the Next Schedule Date, Asset Management does not generate work orders from the PM schedule.
Total skipped addresses	This field is the sum of all the skipped addresses.

Property

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.

Add and associate 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. See [Find and add reference addresses on the Addresses page](#) for more information.

You can also associate an address with a parcel, a contact, an application, and more. For more information, see:

- [Associate an address with a parcel](#)
- [Associate or disassociate a contact with an address](#)
- [Associate or dissociate an address with an application record](#)
- [Associate an address with an address type](#)
- [Associate an inspection district with an address](#)

Find and add reference addresses on the Addresses page

Use the **Addresses** page 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 [Add and associate addresses](#)).

To locate an existing reference address

1. Select the **Addresses** main link.
2. Find and open the desired address.
3. If you are editing the address record, make changes to the address fields as needed, then select **Submit**.

If you want to view a list of applications associated with the address, select the **Record detail** tab.

To add a reference address

1. Select the **Addresses** main link.
2. Select **Cancel**.
3. Select **New**.
4. Complete the required fields and others as needed. See [Address fields](#) for field definitions.
5. Select **Submit**.

Locate 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 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.

To locate addresses with Accela GIS

1. On the desired page, find and open the desired record.
2. Select the **Addresses** tab.
3. Select each address you want to view on the map.
4. From the list menu located next to the **GIS** button, select the map service you want to use.
5. 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.

Work with external APO data

Your agency administrator can configure the **Addresses** page 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 [Run a report from a record](#).

To view external APO data

1. On the **Addresses** page, find and open the desired address.
2. Select the **Record list** tab.

Associate 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. From the **Parcels** page, find and open a parcel record.
2. Select the **Address** tab.
3. Find and open the address.
4. Select the **Parcel** tab.
5. Select **New**.
6. Identify the parcel you want to associate and do one of the following:
 - To enter a parcel manually, complete the **Parcel** form and select **Submit**.
 - or
 - To locate and select an existing parcel, select **Look up**. Enter search criteria as needed to locate the desired parcel and select **Submit**. Select the parcel(s) you want to associate and select **Select**.

Associate or disassociate 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. From the **Addresses** list page, find and open the desired address.
2. Select the **Contact** tab.
3. Identify the contact you want to associate and do one of the following:

- To enter a new contact, select **New**, complete the **Contact detail** form (see [Contacts details](#) for field descriptions), then select **Submit**.
- To locate and select an existing contact, select **Look up**. Enter search criteria as needed to locate the desired contact and select **Submit**. Select the contact(s) you want to associate and select **Select**.

To disassociate a contact from an address

1. From the **Addresses** list page, find and open the desired address.
2. Select the **Contact** tab.
3. Select each contact you want to disassociate from the address.
4. Select **Delete**.

Associate or dissociate 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.

Add an address from a reference database

To add an address from your reference database

1. Find and open a record.
2. Select the **Addresses** tab.
3. Select **Look up**.
4. Enter search criteria and select **Submit** to execute the search.
5. Select each address you want to add.
6. Select **Select**.
7. 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 select **Submit** in the next step.
 - Associated reference data displays. Select which data you want to add to the application then select **Select**.
 - If the associated reference data does not populate automatically or there is no prompt, you

must manually add the data to the record.

8. Select **Submit**.

Add 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 [Associate or dissociate an address with an application record](#).

To add an address to a building application

1. Find and open a record.
2. Select the **Addresses** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Address fields](#) for field definitions.
5. Select **Submit**.

View associated applications

You can view reference addresses associated with applications on the Addresses page. You can view application details by selecting the ID for the application.

To view applications associated with a reference address

1. On the **Addresses** page, find and open an address.
2. Select the **Record list** tab.
3. To view or update application details, select the link to the application that you want to view.

Edit 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. Find and open a record.
2. On the **Addresses** tab, find and open the address you want to edit.
3. Edit the fields as needed. For a description of the fields, see [Address fields](#).
4. Select **Submit**.

Remove 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. Find and open a record.
2. On the **Addresses** tab, select the address(es) you want to delete.
3. Select **Delete**.
4. 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 is automatically deleted 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 select **Select**.
 - If the associated reference data does not delete automatically and no prompt displays, you must manually delete the data from the record.

Associate 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 pages, including **Address**, **Asset**, **Parcel**, and **Record**.

To associate an address with an address type

1. Open the **Addresses** page.
2. Do one of the following:
 - Create a new address.
 - or
 - Open the address you want to associate with an address type.

3. Select the **Address type** tab.
4. Select **Look up**.
5. Complete the **Address Type** and **Description** fields and select **Submit**.
6. Select the address type(s) you want to associate with the address.
7. Select **Select**.



Note: To remove an address type, select the check box next to the address type you want to remove, and select **Delete**.

Associate 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.

To assign a district to an address

1. Find and open the record.
2. Select the **Address** tab.
3. Under the **Number** column in the address list, select the linked name of the address.
4. Select the **District** tab.
5. Select **Search**.
6. Select the district(s) you want to assign to the address.
7. Select **Submit**.

Add a parcel

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. See [Add a reference parcel](#) for more information.

After adding a parcel, you can do the following:

- [Associate a parcel to an application](#)
- [Add, copy, or delete parcel conditions](#)
- [View, copy, and print parcel documents](#)
- [Associate, copy, or move inspection districts with a parcel](#)

- [Associate, copy, or move reference data with parcels](#)
- [View, copy, or move trust accounts associated with a parcel](#)
- [Establish a parcel genealogy](#)
- [External APO Data and parcels](#)

Add 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. Select the **Parcels** main link.
2. Select **Cancel**.
3. Select **New**.
4. Complete the required fields and others as needed. See [Parcel list page fields](#).
5. Select **Submit**.

Search 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 for information.

To search for a reference parcel

1. From the **Parcels** page, find and open the desired parcel.
2. To add a parcel to a record, select **Add reference parcel to record**.
3. To view a list of applications associated with the parcel, select the **Record detail** tab.

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](#).

Associate 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. They 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **Associated public user** tab.
3. Select **Look up**.
4. Enter search criteria as needed and select **Submit**.
5. Choose the public user whom you want to associate with the parcel.
6. Select **Connect**.

Associate a parcel to an application

You can associate one or more parcels to an application.

Agencies can configure Civic Platform so 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.

Add 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 [Add a reference parcel](#).

To add a new parcel to a building application

1. On the desired page, find and open the desired record.
2. Select the **Parcels** tab.
3. Select **New**.
4. Complete the required fields and others as needed.

For descriptions of common fields, see [Parcel list page fields](#).

5. Select **Submit**.

Add 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. On the desired page, find and open the desired record.
2. Select the **Parcel** tab.
3. Select **Look up** to locate a reference parcel.
4. Enter search criteria as needed to locate the parcel you want and select **Submit**.
5. Select the parcels you want to add.
6. Select **Select** to add the reference parcel to a record.



Note: 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 select **Submit**.
- A pop-up window displays the associated reference data. Select which data you want to add to the record and then select **Select**.
- If associated reference data does not upload automatically or following a prompt, you must manually add the data to the record.

7. Select **Submit**.

View 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Associated record list** tab.
3. Do one of the following:
 - To display only the records associated with the selected parcel, select **From current parcel only**.
 - To display the records associated with the selected parcel and its parents, grandparents, or ancestors, select **From current parcel or its history**.
4. To view or update record details, select the link to the record that you want to view.

Add 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Associated record list** tab.
3. Select the check box next to the records that you want to add into a new set.
4. Select **Create a set**.
5. Complete the required fields and others as needed.

Field	Description
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.

6. Select **Submit**.

Copy or move 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Associated record list** tab.
3. Select the application that you want to copy or move and do one of the following:
 - Select **Copy** to copy the application to a genealogically related parcel.
 - Select **Move** to move the application to a genealogically related parcel.
4. Select the desired parcel(s).
5. Select **Submit**.



Notes:

- If you are copying, Civic Platform retains the association between the application and the original parcel.
- If you are moving, Civic Platform removes the application from the original parcel.

Edit 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. On the desired page, find and open the desired record.
2. Select the **Parcels** tab.
3. Open the parcel that you want to edit.
4. Edit the fields as needed. See [Parcel list page fields](#) for field definitions.
5. Select **Submit**.

Remove 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. On the desired page, find and open the desired record.
2. Select the **Parcels** tab.
3. Select the check box next to the parcel(s) you want to delete.
4. Select **Delete**.



Note: 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 select **Select**.
- If Civic Platform does not remove the associated reference data automatically or following a prompt, you must manually remove the data from the record.

Add, copy, or delete 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.

Add 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Conditions** tab.
3. Select **New**.

4. Do one of the following:
 - If you are creating a custom condition, complete the required fields and others as needed. For a description of the fields, see [Conditions form default fields](#).
 - If you are creating a standard condition:
 1. Select the appropriate **Standard condition** link.
 2. Enter search criteria to locate the standard condition you want, then select **Submit**.
 3. Select **Edit** for the standard condition you want to attach to the parcel.
 4. Edit the fields as needed.
5. Select **Submit**.

View 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Conditions** tab.
3. 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**).
4. Select the link to any condition to view details.

Copy 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Conditions** tab.
3. Select the desired condition and do one of the following:
 - Select **Copy** to copy the associated condition to a genealogically related parcel.
 - Select **Move** to move the associated condition to a genealogically related parcel.
4. Select the parcel that you want to copy or move the condition to.
5. Select **Submit**.



Notes:

- If you are copying, Civic Platform retains the association between the condition and the original parcel.
- If you are moving, Civic Platform dissociates the condition with the original parcel.

Delete 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Conditions** tab.
3. Select the **From current parcel only** option.
4. Select the condition you want to delete.
5. Select **Delete**.

View, copy, and print 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.

View 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Document** tab.
3. 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**).
4. Select the link to any document to view details.

Copy or move 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. On the **Parcels** page, find and open the desired parcel.
2. Select the **Document** tab.
3. Select the documents that you want to copy or move and do one of the following:
 - Select **Copy** to copy the documents to a genealogically related parcel.
 - Select **Move** to move the documents to a genealogically related parcel.
4. Select the desired parcel.
5. Select **Submit**.

**Notes:**

- If you are copying, Civic Platform retains the association between the document and the original parcel.
- If you are moving, Civic Platform removes the documents from the original parcel.

Download and printing multiple documents

To download multiple documents, choose the documents and select **Manage documents > Download**.



Note: Your agency must grant **Upload** and **Download** permissions to enable multiple document downloads. Contact your agency administrator with any questions.

To print multiple documents, choose the documents and select **Manage documents > Print**.



Note: The **Print** option is only available if configured by your agency. Contact your agency administrator with any questions.

Associate, copy, or move inspection districts with a parcel

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.

Associate 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **District** tab.
3. 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, select **Search**, select the district you want to associate, and then select **Submit**.
 - If you are using GIS to locate districts, select **GIS**.
 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**.

Copy or move 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **District** tab.
3. Select the inspection district that you want to copy or move and do one of the following:
 - Select **Move** to move the inspection district to a genealogically related parcel.
 - or
 - Select **Copy** to copy the inspection district to a genealogically related parcel.
4. Select the desired parcel.
5. Select **Submit**.



Notes:

- If you are copying, Civic Platform retains the association between the inspection district and the original parcel.
- If you are moving, Civic Platform removes the inspection district from the original parcel.

Associate, copy, or move reference data with parcels

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.

Associate 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **Address** tab.
3. 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. Select **New**.
 2. Complete the required fields and others as needed. For a description of the fields, see [Address fields](#).
 3. Select **Submit**.
 - If you are searching for an existing address:
 1. Select **Look up**.
 2. Enter search criteria as needed to locate the address you want.
 3. Select **Submit**.
 4. Select the address that you want to associate to the parcel.
 5. Select **Select**.
 - If you are using GIS to search for an address:
 1. Select **GIS**.
 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**.

Associate 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **Owner** tab.
3. Select **Look up**.
4. Enter search criteria as needed to locate the owner you want to associate.
5. Select **Submit**.
6. Select the owner you want to add to the parcel.
7. Select **Select**.

Associate 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **Structures & establishments** tab.
3. Select **Look up**.
4. Enter search criteria as needed to locate the structure or establishment you want to associate.
5. Select **Submit**.
6. Select the structure or establishment you want to associate to the parcel.
7. Select **Select**.

Copy or move 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. From the **Parcels** page, find and open the desired parcel.
2. Select the tab containing the reference data you want to work with.
3. Select the reference object (such as an address or structure) that you want to copy or move, and do one of the following:
 - Select **Copy** to copy the reference object to a genealogically related parcel.
 - Select **Move** to move the reference object to a genealogically related parcel.
4. Select the desired parcel.
5. Select **Submit**.



If you are copying, Civic Platform retains the association between the reference object and the original parcel.

If you are moving, Civic Platform removes the reference object from the original parcel.

View, copy, or move trust accounts associated with a parcel

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.

View associated trust accounts

You can view the trust accounts associated with a parcel.

To view an associated trust account

1. From the **Parcels** page, find and open the desired parcel.
2. Select the **Associated trust accounts** tab.
3. Select the **Account ID** link of the trust account you want to view.

Copy or move 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. From the **Parcels** page, find and open the desired parcel.
2. Select the **Associated trust accounts** tab.
3. Select the trust account that you want to copy or move and do one of the following:
 1. Select **Copy** to copy the trust account to a genealogically related parcel.
 2. Select **Move** to move the trust account to a genealogically related parcel.
4. Select the desired parcel.
5. Select **Submit**.

**Notes:**

- If you are copying, Civic Platform retains the association between the trust account and the original parcel.
- If you are moving, Civic Platform removes the trust account from the original parcel.

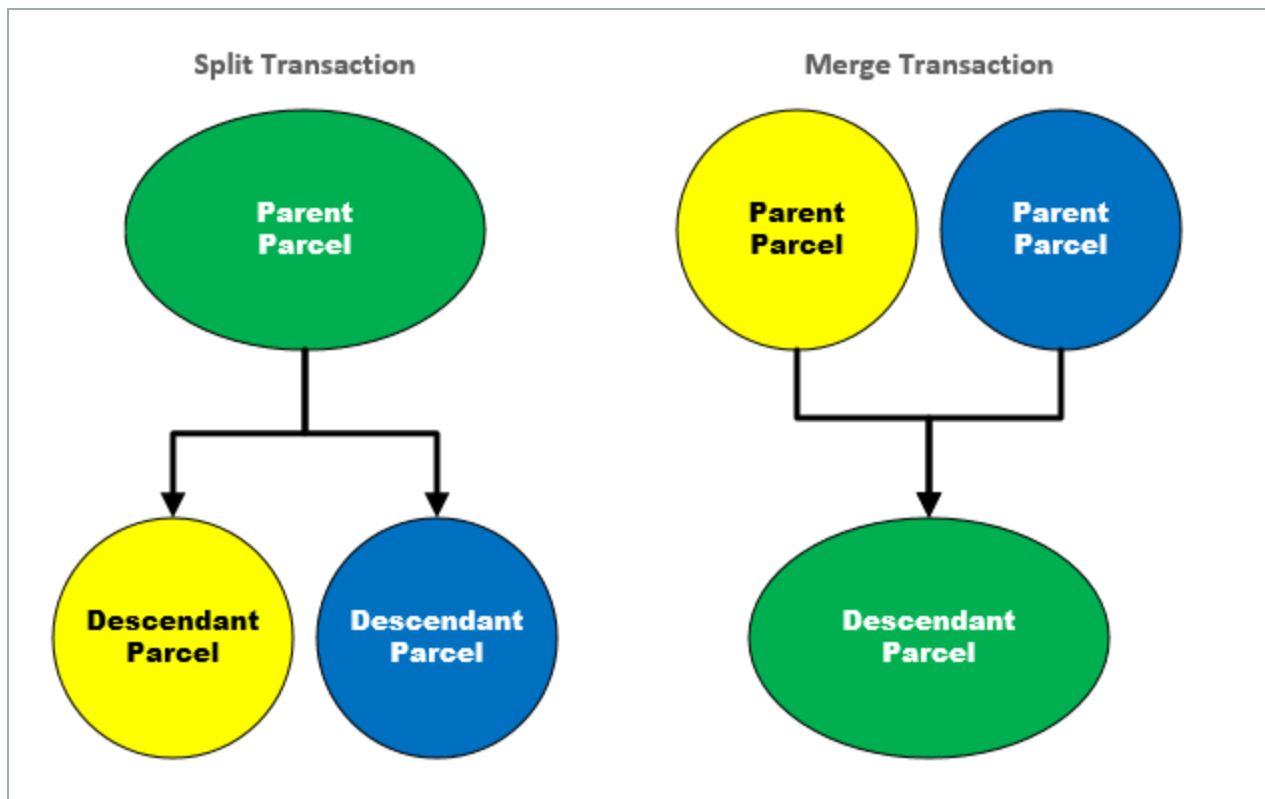
Establish a parcel genealogy

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.

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.

Split 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 on the Parcel list page or when you navigate to the Genealogy summary tab for an active parcel, you can select **Split** to launch the **Split parcel** wizard.

To split a parcel

- 1. Do one of the following:
 - Navigate to the **Genealogy summary** tab for the parcel.
 - On the **Parcels** page, select the parcel that you want to split.
- 2. Select **Split**.
- 3. Do one of the following:
 - To generate new child parcel numbers automatically:
 - 1. Select the **Auto-generate child parcel IDs** option.
 - 2. Complete the required fields and others as needed.

Field	Action
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 of the child parcels.
-  **Note:** By default, Civic Platform lists only two child parcels. Select the **Add** link to add more child parcels. You can remove the third child parcel or any subsequent ones by selecting the **Delete** link next to the parcel.

If you want to use the parent parcel as a child parcel of the split, select 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. Select **Next**.
 - 5. Select which child parcel you want to edit from the **Select a child parcel** list menu.
 - 6. Complete the required fields and others as needed. See [Parcel list page fields](#) for field definitions.

 **Note:** If you select the **All child** parcels option from the **Select a child parcel** list, the Parcel details tab is not available. The parcel details copy from the parent parcel to all child parcels automatically.

- 7. Select each object tab on the left to manage available objects.

- 8. Use the 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** tolist.

 **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, on the **Records** tab, select the **Restart Workflow** option.

- 10. Select **Next**.

- 11. On the **Split summary** page, complete the required fields and others as needed.

Field	Description
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, select the **View details** link next to the child parcel from the Child parcels list.

- 13. Select **Finish**.

Merge parcels

Multiple parents in a parcel genealogy imply a merge. After you merge parcels, Civic Platform disables the original parcels.

To merge parcels

- 1. Do one of the following:
 - Navigate to the **Genealogy summary** tab for the parcel.
 - On the **Parcels** page, select the parcel that you want to merge.
- 2. Select **Merge**.
- 3. To select parcels to merge, do one of the following:

- To add parent parcels from a list:
 1. Select **Add more parcels**.
 2. Enter search criteria as needed and select **Submit**.
 3. Select the parcels that you want and select **Select**.
 4. Repeat steps a through c for each additional parent parcel that you want to include in the merge.
- To add parent parcels from the map:
 1. Select **Add parcels from map**.
 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**.
 4. Repeat steps a through e 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.



Note: If you want to use a parent parcel as the child parcel of the merge, select the parent parcel and then select **Use as child parcel**.

5. Select **Next**.
6. Complete the required fields and others as needed. See [Parcel list page 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. Select each object tab on the left to manage available objects.



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 list menu 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, on the **Records** tab, select the **Restart workflow** option .
10. Select **Next**.

11. Complete the required fields and others as needed.

Field	Action
Retain parent parcel data	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.
Description	A description with details about the merge.
Date	The date when the merge occurred.

12. To view a child parcel, select **View details**.

13. Select **Finish**.

View 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. On the **Parcels** page, find and open the desired parcel.
- 2. Select the **Genealogy summary** tab.
- 3. Select the link to any parcel in the genealogy.
- 4. To view the parcels involved on the map, select the **View in map** link.

External APO Data and parcels

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 [Run a report from a record](#).

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

1. From the **Parcels** page, select **GIS**.
2. Complete the required fields and others as needed. For a description of the fields, see [Parcel list page fields](#).
3. Select the **Parcel #** for the desired parcel.
4. (For external parcels from GIS source) Hover your mouse cursor on **GIS**, and then select **Show/Select GIS Objects**.



Note: 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.

5. Select the **Associated record list** tab.
6. Select the **Document** tab. You can attach documents to the external parcel as needed.

View 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. From the **Parcels** page, find the desired parcel.
2. Select the parcel you want to view in GIS.
3. Select **GIS**.

Add, view, and associate owners

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.

For other actions you can perform with owners, see:

- [Add, edit, or remove an owner in an application](#)
- [Add or remove an owner from a parcel](#)

Add 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. On the **Owners** page, find and open the desired owner.
2. Complete the required fields and others as needed. See [Owner list page fields](#) for field definitions.
3. Select **Submit**.

Find a reference owner

To search for a reference owner

1. On the **Owners** page, find and open the desired owner.
2. Complete the required fields and others as needed. See [Owner list page fields](#) for field definitions.
3. Select the link in the **Name** column for the target owner.



Note: To view a list of applications associated with the owner, select the **Record detail** tab.

Associate or disassociate 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. Contact your agency administrator with questions.

To associate a public user with an owner

1. On the **Owner** page, find and open the desired owner.
2. Select the **Associated public user** tab.
3. Use search to locate the public user you want to associate the current owner with.
4. Select each public user you want to associate with this owner.
5. Select **Connect**.

To disassociate a public user with an owner

1. On the **Owner** page, find and open the desired owner.
2. Select the **Associated public user** tab.
3. Use search to locate the public user(s) you want to disassociate from the current owner.
4. Select each public user you want to remove.
5. Select **Delete**.

Add, edit, or remove an owner in 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.

Add 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 [Add a reference owner](#).

To add an owner to a building application

1. On the desired page, find and open the desired record.
2. Select the **Owners** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Owner list page fields](#) for field definitions.
5. Select **Submit**.

Add 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. On the desired page, find and open the desired record.
2. Select the **Owners** tab.
3. Select **Look up** and enter search criteria as appropriate to find the owner you want to add.
4. Select **Submit**.
5. Choose one or more owners, then select **Select**.



Notes:

- 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.

6. If an associated data list displays, select the data you want to add to the application, then select **Select**.
7. Select **Submit**.

View 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. Find and open the desired owner. See [Find a reference owner](#) for more information.
2. Select the **Record list** tab.
3. To view or update application details, select the link to the application that you want to view.

Edit 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. On the desired page, find and open the desired record.
2. Select the **Owners** tab.
3. In the **Name** column, select the link to the owner that you want to edit.
4. Edit the fields as needed.
5. Select **Submit** to save your changes.

Remove 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. On the desired page, find and open the desired record.
2. Select the **Owners** tab.
3. Select each owner you want to delete.
4. Select **Delete**.



Note: 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.

5. Select the data you want to remove from the record and then select **Select**.

Add or remove an owner from a parcel

Add 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. From the **Parcel** page, find and open the desired parcel.
2. On the **Parcel detail form** page, select the **Owner** tab.
3. Select **New**.
4. Do one of the following:
 - To enter an owner manually, complete the required fields and others as needed, then select **Submit**. See [Owner list page fields](#) for field descriptions.
 - or
 - To select an owner from the database, select **Look up**, enter search criteria to find the desired owner, and then select **Submit**. Select the owner(s) you want to associate and select **Select**.

Remove an owner associated to a parcel

You can remove any owner associated to a parcel.



Note: 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. From the **Owner** page, find and open the desired owner.
2. Select the **Parcel** tab.
3. Select the check box next to each owner you want to disassociate from the parcel and select **Delete**.

Add or delete section, township, and range information

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.



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.

Add township range information

You can add section, township, and range information to an application.

To add township range information

1. Find and open the desired record.
2. Select the **Section township range** tab.
3. Select **Add**.
4. Complete the required fields and others as needed. See [Section, township, and range list pages fields](#).
5. Select **Save**.

Delete township range information

1. Find and open the desired record.
2. Select the **Section township range** tab.
3. Select **Delete**.
4. Select **OK**.

Property-related pages details

The following tables list and define the fields that may be available in the forms and portlets you see when working with **Properties**.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Address fields

The following table lists (in alphabetical order) and defines the default fields available on the Address list portlet.

Field	Description
Address Description	A description of the address.
Address Status	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.
Address Type	Select the Address Type Code for the address from the drop-down list
Audit Date	The creation/modification date of the address.
Audit ID	The identification code of the person who created or modified the address.
City	The city where the address is.
Country	The country where the address is.
Description	A description of the address.
Direction	Use this drop-down list to indicate a street direction. For example, choose N to indicate a north direction. This usually indicates the directional area of a city or street, for example, North Broadway.
Distance	Enter a distance from another landmark used to locate the address.
Event ID	Any event scheduled for the address.
Fraction	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.
House # Alpha (end)	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.
House # Alpha (start)	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.
Inspection District	The inspection district within which the address resides.
Inspection District Prefix	The prefix for the inspection district within which the address resides.
Level # (end)	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.
Level # (start)	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.

Field	Description
Level Prefix	The prefix for the level numbers (floor numbers) that make up the address.
Neighborhood	The neighborhood within which the address resides.
Neighborhood Prefix	The prefix for the neighborhood within which the address resides.
Prefix	Any part of the address that should come before the street name/number, such as a direction. For example “north” in North Willow Drive.
Primary	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.
Secondary Road	The road for the secondary address.
Secondary Road Number	The number of the address’s secondary road.
Source Flag	The Accela application that stores this address information, such as Civic Platform, Kiva, or Tidemark.
Source Number	A number that identifies the Accela application that stores the address information.
State	The state where the address is.
Street # (Start/End)	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.
Street Name	The street name for the address.
Street Suffix (Type)	Choose a type of street, such as Lane or Boulevard.
Unit # (Number)	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.
Unit Type	The type of structure for this address, for example, apartment or condo.
Validated	Indicates the validation status of an address against an external address source.
X Coordinate	If you use a GPS device, this is the longitudinal coordinate for this address.
Y Coordinate	If you use a GPS device, this is the latitudinal coordinate for this address.
Zip	The zip code where the address is.

Parcel list page fields

The following table lists (in alphabetical order) and defines the default fields available on the Parcel list portlet.

Field	Description
Block	The name, or street number, of the block associated with this application. A parcel may contain one or more blocks.
Book	This is a reference to the physical location of this parcel information in the County Assessor's, or other responsible department's records.
Exemption Value	Enter the total value of any tax exemptions that apply to the land within the parcel.
Improved Value	The total value of any improvements to the land within the parcel.
Land Value	The total value of the land within the parcel.
Legal Description	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.
Lot	The name, or boundaries, of the lot associated with the application.
Page	This is a reference to the physical location of this parcel information in the County Assessor's, or other responsible department's records.
Parcel Area	The total area of the parcel. Your agency determines the standard unit of measure (for example, square feet).
Parcel Number	The official parcel number determined by the county assessor or any other responsible department.
Range	A range number to download applications within that range number.
Section	The section number.
Street Suffix (Direction)	The street suffix which indicates the direction. For example, E, NE, and SW. This field is available in the reference parcel search portlet.
Subdivision	The subdivision associated to the application.
Township	The township number.
Tract	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 page fields

The following table lists and defines the default fields available on the Owner list portlet.

Field	Description
Address Line 1	The first line of the owner's address.
Address Line 2	The second line of the owner's address.
Address Line 3	The third line of the owner's address.
City	The city where the address is.
Fax	Enter the owner's fax number.
Name	The name of the owner. This may be an individual person, business, or organization.
Phone Number	The owner's daytime telephone number.
State	The state where the address is.
ZIP Code	The zip code where the address is.

Section, township, and range list pages fields

The following table lists and defines the default fields available on the Section, Township, and Range list portlet.

Field	Description
Section	The name of the section.
Township	The name of the township (usually identified on a north-south grid).
Range	The range (usually identified on an east-west grid).
PLSS Type	The Public Land Survey System type.
PLSS Lot Number	The Public Land Survey System lot number, up to five digits.

Random audits

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.

 **Example:** 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.

 **Example:** 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.

Create a random audit set

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.

 **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. From the **Sets** page, select the **Random audit** tab. .
2. Hover the mouse cursor over the **New** button to display a command menu.
3. Select either **Record audit** or **Inspection audit**.

4. Complete the required fields and others as needed. See [Random audit details](#) for field definitions.
5. Select **Submit**.

To generate an audit set, see [Generate or regenerate a random audit set](#).

Generate or regenerate a random audit set

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 as a **Regenerate audit** button after the initial generation.

To generate a random audit

1. From the **Sets** page, select the **Random audit** tab. .
2. Open the random audit
3. Select the **Set member** tab.
4. Do one of the following:
 - If you just created the set, select **Generate audit** to create the audit set.



Note: If you already generated the set, a list of records displays in the **Set member** tab.

or

- If you want to update the audit set, select **Regenerate audit**.



Note: 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.

Delete a random audit set

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 [View the random audit history](#).

To delete a random audit set

1. From the **Sets** page, select the **Random audit** tab. .
2. Select the check box next to the random audits.
3. Select **Delete**.

View the random audit history

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 a record or inspection open, select the **Random audit history** tab.

To access the random audit history from the sets page

1. From the **Sets** page, select the **Random audit** tab. .
2. Open the audit set.
3. Select the **Set member** tab.
4. Find and open the item of interest.
5. Select the **Random audit history** tab.

Execute a script on an audit set

After you have a set of records or inspections that match your audit set parameters, you can execute scripts on the set of items.



Example: 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.

To execute a script on an audit set

1. From the **Sets** page, select the **Random audit** tab. .
2. Open the audit set.
3. In either the **Set** or **Set member** tab, hover over **Execute script** to display a list of scripts.
4. Select the name of the script you want to execute.

Run 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. From the **Sets** page, select the **Random audit** tab. .
2. Open the audit set.
3. From either the **Set** or **Set member** tab, hover over the **Reports** button to display a list of available reports.
4. Select the name of the report you want to run.

**Note:** The report engine runs the report and downloads a copy to your machine. A pop-up window displays the **Send email** button.

5. Select **Send email** to send a copy of the report by email.
6. Select one or both of the options.

Option	Description
All set member Records' contacts	This sends the report via email to all contacts associated with each record in the audit set.
Other	This sends the report via email to recipients you designate. Enter email addresses in the provided text box. Separate email addresses with a semicolon.

7. Select **Submit**.

Random audit details

The following table lists and defines the default fields available when working with random audits.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Assign Date	This date range limits returned records or inspections to those assigned within that range.
Assigned to Department	Filters returned records or inspections by department.
Assigned to Staff	Filters returned records or inspections by staff member.
Audit Type	This is a read-only field. This field indicates whether the audit set includes records or inspections.
City	Filters returned records or inspections by city.
Closed Date	This date range limits returned records or inspections to those assigned within that range.
Comments	Comments for the audit set.
Completed Date	This date range limits returned records or inspections to those completed within that range.
District	Filters returned records or inspections by district. This field is specific to inspection audit sets.
Expiration Date	This date range limits returned records or inspections to those expired within that range.
Expiration Status	Filters returned records or inspections by expiration status.
External Inspector	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.
Include Previously Audited Records Excluding the Last x Month(s)	This option overrides any administrator-defined audit frequency settings at the record type, module, or agency level for a user-defined number of months.
Inspection Date	This date range limits returned inspections to those whose inspection dates are within that range. This field is specific to inspection audit sets.
Inspection District	Filters returned records or inspections by inspection district.
Inspection Result	Filters returned records or inspections by inspection result. This field is specific to inspection audit sets.
Inspection Type	Filters returned records or inspections by inspection type. This field is specific to inspection audit sets.

Opened Date	This date range limits returned records or inspections to those opened within that range.
Random By	This field defines (by percentage or by number) the quantity of random records or inspections to audit.
Record Type	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.
Record Without Zero Balance	This option include records with unpaid fees in the audit set or includes inspections associated with those records.
Set ID	This a unique identification number for the random audit set.
Set Name	This is the name of the set.
State	Filters returned records or inspections by state.
Status	Filters returned records or inspections by status.
Zip Code	Filters returned records or inspections by zip code.

Records

Each of the entries on a list page (see [List and form pages](#)) is referred to as a record. You 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. See [Create a new record](#) for information on how to create a record.

Example of a record

The screenshot displays the Accela Civic Platform interface for a specific record. At the top, the header shows the record ID 'COM-NEW-24-001502', its status 'Pending', location 'None Provided', contact 'cnstln 59 cnstln 59', and workflow '17 total Task' (0 completed, 1 active). A left sidebar contains navigation tabs: Address (1), Record, Activities (0), Activity Summary (2), Addtl Info, GIS (0), Application History (1), Assess Fee History (0), Assets (0), Assignments and Costs (0), Calendar, Classic Reports, Comments (0), Communications (2), and Conditions (1). The main body features a 'Custom Fields' section with a notice: 'A notice was added to this record on 2024-04-11. Condition: Historic Commission Approval Required. Property and/or structure is noted as Historic. Approval from the Historic Commission is required prior to Issuing the permit. Severity: Notice. Total conditions: 1 (Notice: 1)'. Below the notice are 'Save', 'Reset', and 'Help' buttons. The 'General Project Information' section includes fields for 'Occupant Lead', 'Set Back Front', 'Set Back Right', 'Estimated Cost (Job Value)', 'Total Building Area (Sq. Ft.)', 'Building Height (Stories)', 'Does this project include a demolition?', 'Building Type' (set to 'Residence'), 'ASI FEE', and 'Text Field'. The 'Sprinkler System' section has radio buttons for 'Yes' and 'No'. The 'Set Back Left' and 'Set Back Right' sections also have radio buttons for 'Yes' and 'No'. The 'Elevator' section has radio buttons for 'Yes' and 'No'. The 'Set Back Rear' section has radio buttons for 'Yes' and 'No'. The 'Building Height (Ft.)' section has a text input field. The 'Number of Units' section has a text input field. The 'Work in the right of way?' section has radio buttons for 'Yes' and 'No'. The 'City' section has a dropdown menu set to 'CA'. The 'Hide Picker' section has a dropdown menu set to '-Select-'. The 'Test Date1_ALIAS' section has a text input field.

Section	Description
A	Record header The record header displays the most common information you will need. It provides a summary of the most relevant record information. The new header includes 5 components with the option to hover over to expand each component and provides links to take you to the relevant detail tab. The record header displays on each unique record space as you navigate to each record specific tab or action.
B	Record tabs A list of tabs displays on the left side of each record. With each tab, you can perform various functions on that record. For example, you can add and view activities or comments to certain records. You can also see the workflow associated with a record.
C	Record body The record body consists of fields and information. Record fields can be different according to how your agency configured that particular record type. If you have question about the fields in a record, contact your agency administrator or help desk.

Create a new record

You can 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, you can also search for the record type by its alias name, which can make it easier to find the correct record type.

To create a record from Launchpad

1. Select the launchpad  and select **Create new record**.
2. Select a record type.
3. Select **Create record**.



Note: After selecting **Create record**, Civic Platform opens the Application Intake Form, which contains all of the fields associated with that record. (See [Record application intake form sections](#) for more information.) The fields available in this form can vary depending on how your agency has configured it. Contact your agency administrator with questions.

4. Complete the fields with the appropriate information.
5. Select **Submit**.

To create a record from the Records page

1. Open the **Records** page.
2. Select **New**.
3. Select a record type.
4. Select **Create record**.



Note: After selecting **Create record**, Civic Platform opens the Application Intake Form, which contains all of the fields associated with that record. (See [Record application intake form sections](#) for more information.) The fields available in this form can vary depending on how your agency has configured it. Contact your agency administrator with questions.

5. Complete the fields with the appropriate information.
6. Select **Submit**.

Submit a partially completed record

You can submit partially completed applications, which enables you 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. 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 [Create a new record](#) for more information).
2. Complete the fields for which you have information. Do not complete any fields for which information is missing.
3. Select **Submit**.
4. If the record contains incomplete fields Civic Platform displays a "Validation failed" message and asks if you want to submit the record.
5. Select **OK** to submit the record without validation.
6. When you are ready to add missing information and/or missing documentation to the application, enter it into the record's required fields, and satisfy any conditions of approval on the record.
7. When you are ready to validate the application, navigate to the **Workflow** tab and update the status accordingly.
8. Select **Submit**.
9. Select **OK** to open the application for validation.
10. Select **Validate**.
11. Scroll through the application and verify that all required fields are complete, then select **Submit**.

When Civic Platform successfully validates the record, the workflow status updates to **Accepted**.

Search a record

With record lists, you have the ability to search for records that meet the criteria you enter. This search is found by clicking the **Search** button or the **Look up** button, depending on the record list you have open.

Record search and Global Search are different kinds of searches in Civic Platform. A record search is specific to the record group for which you are searching, and Global Search is a general search. See [Global search](#) for more information.

When you start a record search, the search page displays the fields for which you can enter the criteria for the specific types of records you are searching.



Example: You are looking for a record that was assigned between April 1, 2024 and April 30, 2024. In the search fields for **Assigned date** you would enter those dates as shown in the example screen below.

Example screen



Note: The fields that display in the record search depend on how your agency configured the fields for the particular records for which you are searching. Contact your agency administrator with any questions.

To search records

1. From a record list, select **Search**.
2. Enter your criteria into the specific fields for which you want to search.
3. Select **Submit**.



Notes:

- To clear the record search screen, select **Reset**.
- To exit the record search screen, select **Cancel**.

Enable Soundex search

The Soundex search features allows you to search using Soundex to return results that match phonetically. To use Soundex search, select the check box next to **Enable soundex search** before selecting the **Submit** button.

Record application intake form sections

The application intake form is the page that displays when you create a record. (See [Create a new record](#) for more information.) The application intake form organizes group data fields by section.



Note: The sections available on the application intake form vary by record type and by how the form was configured by your agency. Contact your agency administrator with any questions.

The following describes a few of the common sections you may see in an application.

Applicant and contact section

The **Applicant** and **Contact** sections of an application allow you to include contact information in new applications. 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.

See [Add, validate, delete, and edit contacts in a record](#) for more information.

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 select **Search**.

Method 1: Select Address(es) and other items

1. Select each address you want to add and select **Select**.
2. 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.

or

A list of the items associated to the address you are adding displays.

3. Select the items you want to add to the record and select **Select**. Do not select any items if you plan to complete needed fields manually.



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 [Record application intake form sections](#) and [Record application intake form sections](#) for examples.

Method 2: Get Parcel & Owner button.

1. Select **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.

1. Select **New** on the Address Search Results page.
2. Manually enter a new address.
3. Select **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.

Method 4: Use the GIS Address Locator.

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

1. If your agency uses Accela GIS, select the **Address Locator** button.
2. Select **Locate Address** and select an area on the map with the cursor.
3. Select **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.

1. Open Accela GIS, then select the **GIS** button.
2. Select the desired parcels in the GIS viewer and select **Create Record**.
3. Select one or more addresses from the address list and select **Select**.
4. Select one or more parcels or owners from the Parcel Owner Selection List and select **Select**.
5. Choose a primary parcel/owner and select **Submit**.

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. See [Attachments](#) for more information.

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 select **Search**.

Method 1: Select Parcel(s) and other items

1. Select the parcels you want to add and select **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.

2. 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.
3. 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 select **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.

1. Select **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.

1. Select **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.

2. Select **Submit** to add the parcel to the application intake form.



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.

1. Select 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.

2. Select the desired parcels in the GIS viewer and select **Create Record**.
3. Select the parcels you want to add to the record and select **Select**.
4. Choose a primary parcel and then select **Submit**.



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

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 select **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 [Add, view, and associate owners](#).



Notes:

- 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. Select the check box of each item you want to add to the record and select **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. Select the **Search P+** button to add 'PERMITS' Plus owner records to the application intake form.

Using the GIS button

1. Select 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.

2. Select the desired parcels in the GIS viewer and select **Create Record**.
3. Select the parcels you want to add to the record and select **Select**.
4. Choose a primary parcel and then select **Submit**.

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. Select **Submit**.
3. Select each structure or establishment you want to add to the application intake form.
4. Select **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 dialog displays the associated reference data. Select which data you want to add to the permit, then select **Select**.
 - Civic Platform does not add the associated reference data. You must add data manually to the permit.
6. Select **Select**.

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.



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 page, 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.

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.

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.

Search 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.

Search for application-specific table data from results list

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

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.

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](#).

When you submit an application, Civic Platform adds the data you 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 page, see [Education and examination providers](#).

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 re-certification.

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.

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

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.

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 [Select 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 [Modify educational credentials](#).

Add, validate, delete, and edit contacts in a record

A contact can be any person who has some involvement in the application process, including the applicant, billing contacts, and legal contacts.



Notes:

- 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.
- The application intake form is the page that displays when you create a record.

When you select 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.

Add a contact

Depending on the type of record you are creating, there are various ways to add contact information. 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 [Validate 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 [Add 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 select the **Search** button to open the **Contact list** window.
 - Navigate to the **Contact list** section.

2. Select **Search**.

3. Complete any fields that display and select **Submit**.

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



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.

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.

4. If the search results contain the contact(s) you want to add:
 - In the single contact section, select the icon next to the contact you want to add.

If available, you can select the Associated Contact link next to the contact to view the contacts associated with the selected contact, and select the icon beside the contact you want to add.
 - In the multiple contact section and in the contact list section, choose the contacts you want to add and select **Select**.

To view records that are associated with the selected contacts, select the desired contacts, then select **Search associated**. Select the contacts that you want to add and select **Select**.

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

- Select **Close matches** to retrieve close match contacts. For more information on close match search, see [Look for close matches](#).
- Select **New in reference** to create a new reference contact. After you complete the fields in the popup Contact New Form (see [Contacts details](#)), select **Submit**.

When you see the contact(s) you want to add in the search results list, perform Step 4.

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 selecting **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 [Add 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 list.

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

1. After adding an owner, a licensed professional, or a contact to the corresponding section of the application intake form, do one of the following:
 - Select the **As lic. prof** button if the contact you want to add is a licensed professional you added in the licensed professional section.
 - Select the **As owner** button if the contact you want to add is the same as the owner you added in the owner section.
 - Select 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 [Add 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, select **Search**, then select **New**.
 - Navigate to the contact list and select **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 [Record fields and sections](#)).



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 [Add contact addresses for a contact](#).

Add 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, select **New** in the contact address sub section.
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 [Contacts details](#).

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 [Contacts details](#).
 2. Select 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 select **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, select **Cancel**.

Civic Platform sets the Validated field of the address to No.

3. Select **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. Select 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.

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. Select **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 page.

To edit a contact address

1. Select 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 [Contacts details](#).
3. Select **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. Select **Remove** to remove the contact address from the current record contact, or select **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 page.
 - 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.

For information on defining a new contact address, see [Create, associate, or delete reference addresses for a contact](#).

Set 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.
2. Select **Set primary**.

Validate 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.

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 [Add a contact](#).

2. Select **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.

3. In the **Contact list** window, do one of the following:
 - Select the reference contact that you want to add from the contact list.
 - Select **New** to create a new reference contact. After you complete the fields in the **Contact new form**, select **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 **Contact address look up form** by marking the check boxes besides the contact addresses, and selecting **Select**. If you select a contact address and select **Deactivate**, the contact address no longer displays in the **Contact address look up form**.

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** 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.

Delete 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. Select **Delete**.

Edit 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** list.
3. To edit contact details, select the contact that you want to edit.
4. Update the fields as needed. For a description of the fields, see [Record fields and sections](#).
5. Add or edit the contact address in the **Contact Address** section. For more information on contact

addresses, see [Add contact addresses for a contact](#).

6. Select **Save**.

Estimate fees in a record

You can calculate an estimate of costs payable to the agency by partially completing a record. If you save your settings, you can search for the partial record 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 record name.

To estimate fees

1. Create a new record. See [Create a new record](#) for more information.
2. Select **Estimate fee**.



Note: If you selected the **Create one record for each parcel** option on the record type dialog, Civic Platform disables the **Estimate fee** and **Manual input ALT ID** buttons.

3. Do one of the following:
 - **To add a fee item:**
 1. Select **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, select **Reset**.
 4. Select **Submit**.
 - **To edit a fee item:**
 1. Select the Fee Item link for the item that you want to change.
 2. Make changes as needed.
 3. Select **Submit**.
 - **To delete a fee item:**
 1. Select the item that you want to delete.
 2. Select **Delete**.
 - **To edit a related condition:**
 1. Select the name of the condition that you want to edit.
 2. Make changes as needed.
 3. Select **Submit**.

4. When you finish viewing the estimated fees, select **Cancel**.



Note: Because the fees are only an estimate, you do not need to save them.

5. Select **Save without submit**.



Note: Civic Platform saves the partially completed application to be submitted at a later time.

Automatically populate Accela GIS data to a record

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, contact your agency administrator.

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

1. Create a new record. See [Create a new record](#) for more information.
2. Complete the form fields with available data.
3. When you reach the **Address**, **Parcel**, or **Owner** section, select **GIS** or **Address locator**.
4. Select each GIS object you want to reference. You can select **Select all objects** if you plan to associate all the objects.
5. From the list menu, select **Send features to AA**.
6. Select **Submit**.



Note: 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.

7. If prompted, choose the object you want to select as the primary object.



Note: 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.

8. Select **Submit**.
9. Select the inspections you want to schedule.
10. Select **Submit**.

Delete 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, select 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. Open the record list of completed records.
2. Select the check box next to the record(s) you want to delete.
3. Select **Delete**.
4. Select **OK** to confirm the deletion.

To delete a partial record

1. Open the partial record you want to delete by selecting the record hyperlink.
2. Select **Delete**.
3. Select **OK** to confirm the deletion.



Note: You can select **Cancel** to return to the **Edit partial records by single** window.

Add, view, and edit 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.

Add 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. From the appropriate page, find and open the desired record.
2. Select the **Comments** tab.
3. Select **New**.
4. Do one of the following:
 - Add a standard comment:
 1. Either select the **Standard comment** hyperlink or the data picker next to the **Comment** field.
 2. From the **Type** menu, select the type of standard comment you want.
3. Select the link of the name of the standard comment you want to use.
4. Select **Close**.
5. If desired, edit the comment.
- Enter your own comment by typing it in the **Comment** field. If a standard comment already appears in this field, you can edit it if desired.
5. Select the **Apply to inspections** option to display the comment in the **Record comments** field of inspections associated with the record.
6. Select **Submit**.



Note: Each standard comments type contains several relevant comments you can choose from. Consult your agency administrator if you have questions about standard comments types.



Notes:

- Civic Platform displays the **Comment list** page 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 Scheduled Date *: 12/27/2011 ☒ Display in ACA

Result Comment [Standard Comment](#)

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

View or edit a record comment

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

To view comments or edit comments

- From the appropriate page, find and open the desired record.
- Select the **Comments** tab.
- Select the link in the **Comments** column for the comment you want to view.
- If you are modifying the comment, make the desired changes and select **Submit**. See [Add a comment to a record](#) for information about selecting a standard comment.

To remove the Comments field from an associated inspection display

- With the associated inspection displayed, select **Remove** for each comment you do not want.
- Select **Save**.

To edit the Comments field from an associated inspection display

- With the associated inspection displayed, select **Edit** for the comment you want to modify.
- Edit the comment as needed.
- Select **Save**.

Add documents to a record

You can add documents or graphics to a record at any time from either the **Documents** tab or from the **Inspection** page. When added from the **Inspection** page, 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](#).

Assign inspection districts to a record

If a record requires inspection, you can associate an inspection district (or more in rare cases) with the record address or parcel. 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. Open the record you want to work with.
2. Select the **Address** or **Parcel** tab.
3. Select the link in the list for the address or parcel you want to view.
4. Select **District**.
5. Select **Search**.
6. Select each district that you want to assign to the record.
7. Select **Submit**.



Note: Civic Platform returns to the **District** list with the new districts added to the record.

View record information

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

View or edit 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 section below.

To view record details

1. Find and open the record you want to view or edit.
2. Select from the available tabs in the detail section to view record details.
3. Update any fields that display on the selected tab as desired.
4. Select **Submit**.

View or edit 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. Find and open the record.
2. Select the **Record** tab.
3. Select **Summary**.
4. Edit the data as needed.
 - See [Record fields and sections](#) for field definitions.
 - If you are working with contacts, see [Contacts](#) for more information.
 - If you are working with parcels, see [Add a parcel](#) for more information.
 - If you are working with owners, see [Add, view, and associate owners](#) for more information.
5. Select **Submit**.

View, edit, and delete application status history

Application 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 application status history, including the date, status, comments, and related staff member information, to correct errors and ensure the accuracy of status entries. This feature is useful if you plan to clone a record, reopen a record to resolve pending issues, or reassign a record to a different person at your agency.



Note: If this feature is unavailable, contact your agency administrator with questions.

Edit or delete an application status history record

1. Find and open the record.
2. Select the **Application history** tab.
3. Do one of the following:

To edit a status history record:

1. Select the **Status** link for the status history record you want to view.
2. Edit the data as needed.
3. Select **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.

4. Select **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:

1. Select the check box next to each status history record you want to delete.
2. Select **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.

3. Select **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.

View the application status history log

Access the Application status history log to view all the status history modifications.

1. Find and open the record.
2. Select the **Application history** tab.
3. Select **View Log**.

Print an application permit

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 records. Civic Platform generates printable permits, licenses, applications, and service requests in PDF (Portable Document Format).

To print a permit

1. Find and open the permit you want to print.
2. Select the **Record** tab.
3. Hover over **Menu** and select **Print page**.



Note: Civic Platform generates a PDF version of the permit and displays it in a new window.

4. Use your browser's print option to finish printing the record.

View the summary page

You can view a customized **Summary** of a record as needed. Each section of the summary addresses an application area. Sections include a brief summary, field information, and a link 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** tab, see [Record summary page sections](#).

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

To view the Summary page

1. Find and open the record you want to view
2. Select the **Summary** tab.
3. Select any linked item 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.

View inspections on the summary page

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

To view inspections on the Summary page

1. Find and open the record.
2. Select the **Summary** tab.
3. In the Inspections section, select the link to any pending, scheduled, or completed inspection to view the inspection detail.

Assign a record

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 ways to assign 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 assign the best candidate for that record.

Make an assignment to one or more records

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.



Note: When you use this option to assign records, you do not have the option to review the experience and workload of the assignees.

To assign to one or more records

1. Open the page with the list of records.
2. Select the check box next to the record(s) you want to assign.
3. Hover over **Menu** and select **Assign**.
4. Do one of the following:

- If you are assigning the record to yourself, select the **Current user** link.



Note: Civic Platform updates both the **Assigned to Staff** and the **Assigned to Department** fields with your name and department.

- If you are not assigning the record to yourself, select a department from the **Assigned to department** list field and then select an individual from the **Assigned to staff** list field.

5. Select **Save**.

Make an assignment to an individual record

Civic Platform enables you assign a record while considering an assignee's skillset and workload.

To assign to a single record and associate workloads and skillsets

1. Find and open the record to assign.
2. Select the **Record** tab.
3. Hover over **Menu** and select **Assign**.



Note: Civic Platform displays a list of eligible departments and eligible staff members with their **Skillset** and **Workload** points and Ratio.

4. Select the check box next to the staff member to assign.
5. Select **Save**.

Create a set from a record list page

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

To create a set from a record page

1. Open a record list page.



Note: You can use **Search** to locate the records you want to include in your new set. This allows you to use the **Select all and create a set** feature.

2. Do one of the following:
 - To create a set from all of the records listed in the list page:
 1. Select **Create a set > Select all and create a set**.
 - To create a set from manually selected records in the list portlet:

1. Select the check box next to the records that you want to include in the new set.
2. Select **Create a Set > Create a Set**.
3. Complete the following fields with available data:

Field	Action
Set ID	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.
Set Name	Enter a name to identify this set. Civic Platform permits duplicate set names.
Comments	Enter commentary as needed. For example, you can summarize the purpose for creating the set.
Set Type	Select a set type from the list field. 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.
Set Status	Select a status describing the set from the list field. The available status options change depending on the set type you select.
Set Status Comments	Enter comments about the set status as needed.

4. Select **Submit**.

Close 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. Find and open the record you want to close.
2. Select the **Status** tab.
3. Select one of the closed options from the **New status** list menu.
4. Complete other fields as required.
5. Select **Save**.

View and delete alerts

You may receive alerts about records with which you are working. You can view alert details and delete alerts after you no longer need them.

View 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.

To view record details from an alert

1. From the **Alert** page, open the alert you want to view.
2. If the alert has an associated record, select the record ID.
3. 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. Open the **Alert** page.
2. Select the check box next to the alert(s) you want to delete.
3. Select **Delete**.

Run a report from a record

Your agency can configure your system to enable users to run, email, or print reports from the **Record** page. For more information about running reports and about reporting in Civic Platform, see:

- [Access and run reports](#)
- [Send a report by email](#)

Add or remove record hearing agendas

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.



Note: This feature is configured by your agency. Contact your agency administrator with questions.

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.

Add an application record to a hearing agenda

After you submit an application, the work proposed in the application might need a hearing body to review it. For example, building plans for a subdivision might need to be reviewed by a community council. 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. Find and open the record you want to associate with a hearing agenda.
2. Select the **Hearings** tab.
3. Select **Schedule**.
4. Enter search criteria as needed to locate the desired hearing.
5. Select **Submit**.
6. Select the hearing(s) that you want to associate with the record.
7. Select a hearing reason from the **Reason** list field.



Note: Civic Platform displays the comments associated with the hearing reason in the **Comments** field.

8. Select **Submit**.

Remove an application record from a hearing agenda

1. Find and open the record you want to remove from a hearing agenda.
2. Select the **Hearings** tab.
3. Select the hearing you want to remove.
4. Select **Delete**.

Associate PERMITS Plus APDs to a record

If your agency uses the PERMITS Plus permitting system, your administrator can configure some list pages 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 select the PERMITS Plus APD link to launch the PERMITS Plus system.

Associate 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. Find and open the existing record you want to associate with an APD.
2. Select the **Related records** tab.
3. Select **Look up**.
4. In the **Data source** field list menu, choose **P+ - Permit Plus**.
5. Complete other search fields as needed.
6. Select **Submit**.



Note: Civic Platform returns a list of PERMITS Plus APDs that match your search criteria.

7. Select the check box next to the APD you want to associate.
8. Do one of the following:
 - Select **Select as parent** to set it as the parent of the current application.
 - Select **Select as child** to set it as the child of the current application.

Remove a related PERMITS Plus APD

1. Find and open the existing record you want to associate to an APD.
2. Select the **Related records** tab.

 **Note:** You can identify APDs by the symbol [P+].

3. Select the check box next to each PERMITS Plus APD you are removing.
4. Select **Delete**.

Search for a PERMITS Plus APD

If your agency subscribes to PERMITS Plus, you can search for an APD from the Civic Platform **Building permits** page. Select an APD hyperlink to launch PERMITS Plus and open the selected record.

To search for a PERMITS Plus APD

1. From the **Service requests** or **Building permit** page, select **Search**.
2. Select **P+ - Permit Plus** from the **Data source** field list menu.
3. Enter any other search criteria as desired.
4. Select **Submit**.
5. To view an application or a service request, select the name link.

Record fields and sections

Application records can include any or all of the fields listed in [Applicant and contact fields](#). The records might also contain additional sections to collect related data. The sections listed in [Record application intake form sections](#) might also be available on your application record forms.

 **Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Application record fields

The table below lists and defines fields that might be available as you work with records.

Field	Description
Alt ID	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.
Application Name	A unique name that identifies the application.
Assigned Date	The date that a department or individual receives an application assignment.
Assigned To Department	The department responsible for the application.
Assigned to Staff	The individual who is responsible for the application.
Channel Reported	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.
Check Number	If an applicant pays a fee with a check, this is the check number.
Certification Accepted	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. For more information about the statement in the certification section, see the "Page Flow Configuration" chapter in the Civic Platform Citizen Access Administrator Guide.
Certification Date	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. For more information about the statement in the certification section, see the "Page Flow Configuration" chapter in the Civic Platform Citizen Access Administrator Guide.
Trust Account ID	If an applicant pays a fee with a trust account, this is the trust account ID number.
City	Enter the name of the city wherein the primary address is located.
Closed by Department	The department responsible for closure from the list.
Closed by Staff	Choose the name of the staff member who initiated the closure. Select the Current User link to enter your user name into the field.
Closed Date	The closure date.
Completed by Department	The department that completed the application requirements.
Completed by Staff	The name of the staff member responsible for completing the application requirements. Select the Current User link to enter your user name into the field.
Contact Address Line 1, Line 2,	The street address for the contact using the 3 address lines provided.

Field	Description
and Line 3	
Contact Address City	The city where the contact resides.
Contact Address State	The state where the contact resides.
Contact Address Zip	The postal ZIP code for the contact's address.
Contact Address Country/Region	The country or region where the contact resides.
Contact Email	The email address of the primary contact associated with the application.
Contact FEIN	The 9-digit Federal Employer ID Number of the primary contact on the record. For example, 12-3456789. Note that the maximum input value is 11 characters. 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 selecting the Organization button.
Contact First Name	The first name of the primary contact associated with the application.
Contact Last Name	The last name of the primary contact associated with the application.
Contact Middle Name	The middle name of the primary contact associated with the application.
Contact Relationship	The primary contact's relationship to the application.
Contact SSN	The 9-digit Social Security Number for the contact on the record. After saving the data, the SSN displays as ***-**-1234.
Contact Type	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. When you select the Individual option, these fields become available: First Name, Middle Name, Last Name, SSN. These fields are no longer available: Organization Name, DBA/Trade Name, FEIN. If you select the Organization option, reverse the enabled vs disabled fields.
Data Source	If your agency uses the PERMITS Plus permitting system, use this menu to select a data source for your search. Select AA - Civic Platform to search Civic Platform records. Select P+ - Permits Plus to search PERMITS Plus APD records.
DBA/Trade Name	The Licensed Professional's business name.
Detailed	A detailed description of the proposed work.

Field	Description
Description	
Direction	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.”
Email	The email address of the primary contact associated with the application.
Expiration Date	The date when a license record expires.
Expiration Status	The status of a license record.
First Issued Date	The date of first issue.
First Name	The first name of the primary contact associated with the application. This field supports wildcard searches (see).
House # Alpha (end)	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.
House # Alpha (start)	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.
Initiated by Product	This field is read-only and identifies the Civic Platform product area where the application is submitted.
Last Name	The last name of the primary contact associated with the application. This field supports wildcard searches (see).
Level # (end)	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.
Level # (start)	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.
Level Prefix	The prefix for the level numbers (floor numbers) that make up the address.
Legal Description	The legal description of the parcel associated with the application. This field supports wildcard searches.
Middle Name	The middle name of the primary contact associated with the application.
Opened Date	The date when Civic Platform creates the application record. Select the Calendar icon located next to the From and To fields to specify a date range. Civic Platform automatically enters the dates.
Opened Department	The department responsible for creating the record. Select the Selection icon to choose a department.
Opened Staff	The name of the individual responsible for creating the record. If you are responsible, select the Current User link.
Organization	The name of the organization to which the primary contact belongs. This field

Field	Description
Name	supports wildcard search (see).
Owner Name	The primary owner associated with the application. This field supports wildcard search (see).
Parcel Number	The primary parcel number associated with the application. This field supports wildcard search.
Permissions	Indicates the level of access for the contact to the record in Citizen Access. Full grants the contact full access to the record in the My Record list and the Record search result list in Citizen Access. Schedule Inspections Only 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. Read grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access. None denies the contact access to the record in the My Record list and the Record search result list in Citizen Access.
Primary	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. If, for example, an application has only one associated parcel, Civic Platform automatically designates it as the primary parcel. To change a primary setting from “No” to “Yes,” you must first change the current primary designation. In most other actions, Civic Platform also duplicates the primary setting information. For example, when you clone or copy the application (Daily > Application > Copy Application), Civic Platform also copies the parcel settings to the new application.
Priority	The priority level assigned to the application.
Receipt Number	If Civic Platform generates a receipt (payment or refund) for the current application, this is the receipt number.
Record Type	The type of application. You cannot modify this field. The field lists the group, type, subtype, and category of the application type.
Record Description	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.”
Record ID	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.

Field	Description
Record Name	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."
Record Type	The type of application. You cannot modify this field. This field displays the application type for the record. The following information displays: group, type, subtype, and category. You cannot modify this value. When you perform an application search, you can select an application type from the group, type, subtype, and category list. The available application type options include all the application types that your agency administrator sets as enabled, or disabled yet searchable.
Relationship	The primary contact's relationship to this application. If you are searching for an application, use the list to choose a relationship. For example, choose "citizen."
State	The state of the primary address associated with the application.
Status	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.
Status Group	The status group the application status belongs to.
Status Reason	A reason that explains why the record displays a certain status.
Street # (Start/End)	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.
Street Direction	The street direction of the primary address associated with the application. For example, choose N to indicate a north direction as in "North Broadway."
Street Name	The street name of the primary address associated with the application. This field supports wildcard searches (see).
Street Number	The street number of the primary address associated with the application.
Street Suffix	The street suffix of the primary address associated with the application.
Street Type	The street type of the primary address associated with the application. For example, choose Street, Boulevard, or Lane.
Street Suffix (Direction)	The street suffix which indicates the direction. For example, E, NE, and SW.
Unit Type	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.

Field	Description
URL	The URL to the record information stored in a third-party web application. If necessary, you can append the session variable <code>\$\$ALTID\$\$</code> to the URL like this: <i><code>http://www.bridgeview.gov/permitsystem?permitID=\$\$ALTID\$\$</code>.</i> The session variable retrieves the Alt ID of the record from the application intake form or the Record Detail window.
ZIP Code	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.

Field	Description
Address/Street Address	The contact's address information. You can have up to three lines of address information.
City	The city in which the contact resides.
Contact Type	Select the Individual 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 Organization 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.
Country/Region	The country or region in which the contact resides.
DBA/Trade Name	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.
Email	The contact's email address.
Fax	The contact's fax number, with Country and Area code.
FEIN	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.
First Name	The contact's first name. This field is only active when the Contact Type selected is Individual.
Full Name	The contact's full name.
Last Name	The contact's last name. This field is only active when the Contact Type selected is Individual.

Field	Description
MI	The contact's middle initial. This field is only active when the Contact Type selected is Individual.
Notes	Enter any additional information in this text field.
Notify contact with record update	Indicates whether this contact should receive a notification when the application status changes. Choose Yes from the list to notify and choose No to not notify.
Organization Name	The organization to which the contact belongs. This field is only active when the Contact Type selected is Organization.
Permissions	Indicates the level of access for the contact to the record in Citizen Access. Full grants the contact full access to the record in the My Record list and the Record search result list in Citizen Access. Schedule Inspections Only 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. Read grants the contact read-only access to the record in the My Record list and the Record search result list in Citizen Access. None denies the contact access to the record in the My Record list and the Record search result list in Citizen Access.
Phone 2, Phone 3	Additional telephone numbers for the contact. Indicate primary, secondary, and tertiary numbers by using the Telephone, Phone 2, and Phone 3 fields.
PO Box	The contact's post office box number.
Preferred Channel	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.
Primary	This list indicates whether the contact is the primary contact for the application. Choose Yes to set as the primary contact and No to set as not the primary contact.
Relationship	The contact's relationship to the application; for example, applicant, or agent. Use the list to choose a contact relationship.
State	The state in which the contact resides. Use the list to choose a state.
SSN	The contact's Social Security Number. This field is only active when the Contact Type selected is Individual .
Telephone	The contact's telephone number, including Country and Area codes.
Title	The contact's business title, for example President. This field is only active when the Contact Type selected is Individual.
Type	The type of contact. Civic Platform uses contact types to group contacts with similar functions. Types might include Complainant or Billing Contact. Use the list to choose a contact type.

Field	Description
Zip Code	The contact's zip code.

Record summary page sections

The following table lists the sections that might display on the **Record summary** page.

Application Summary Page Section	Description
Adhoc Task Status	This section displays the status of any ad hoc tasks associated with the application.
Record Comments	This section displays record comments.
Record Detail	Select the record detail link in this section to view the Record detail page.
Application Specific Info	This section displays application-specific information about the selected record type.
Record Status	Select the application status link to view the Application Status detail page.
Balance	Select the balance amount to view the Payment detail page.
Condition Status	Select a condition to view the associated Condition Detail and History pages.
Contact Info	This section displays the contact detail for record contacts.
Description of Work	Select the description of work link in this section to view the Record detail page.
File Date	This section displays the date the application was submitted. Select the link to view the Record detail window.
Inspections	This section displays pending, scheduled, and resulted inspections associated with the record. For more information on the Inspections section, see View inspections on the summary page .
Job Value	Select the job value amount to view the Additional Information Form detail page.
Licensed Professional Info	This section displays licensed professionals associated with the record. Select the license number of a licensed professional to view the Professionals detail page.
Parcel No	This section displays parcels associated with the record. Select the parcel number to view the Parcel detail page.

Application Summary Page Section	Description
Required Inspections	This section displays inspections that must occur before Civic Platform accepts the application.
Structure	This section displays structures associated with the record.
Total Fee Assessed	This section displays the total amount of fees assessed to the record. Select the total fee assessed link to view the Fee detail page.
Total Fee Invoiced	This section displays the total amount of the fees invoiced to the record. Select the total fee invoiced link to view the Payment detail page.
Tracking #	This section displays the record tracking number.
Workflow Status	This section displays the workflow tasks associated with the record. The current application status link displays as a hyperlink. Select this link to the Workflow Task detail page.

Record relationships

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.



Note: The maximum number of relationships a single record can contain is 100 associations.

View related record information

There are two ways for you to access the related records of a given record.

- Go to the **Related records** column in the record list page. This column provides links to the parent, child, and sibling records for the current record.
- Open the **Related records** tab in the record detail page. This tab displays the record relationships in a tree view or list view. The tree view offers you a 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.

Open 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 page. You can also select the links on the record list page.

To open shortcuts to related records

1. In the list view, find the record that has the related record information you want to view.
2. In the **Related records** column of the record, and select the **View** link or hover the mouse over the link in the current record.



Note: Civic Platform provides shortcuts to the parent, child, and sibling records for the current record in a pop-up window.

3. Select a related record link to view the related record details.



Note: 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 selecting the relevant button in the tab.

View 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.

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:

- Select 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, select **List view** on the toolbar.

View 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.

Use the **Relation** column in the list view to see the relationship of each application with the current application. See [To switch from list view to tree view, select Tree View in the toolbar..](#)

You can perform the following tasks in the list view:

- Select the Relation column name to sort the list view by the family hierarchy of the current application.
- Select the link to a related application. A new application detail page 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, select Tree View in the toolbar.

Application Relation	Display in “Relation” Column
Immediate Parent Application	Parent Application Alt ID
Current Application	Current Application Alt ID (in red font)
Sibling Application	Parent Application Alt ID / Sibling Application Alt ID
Child Application	Current Application Alt ID (in red font) / Child Application Alt ID
Grandchild Application	Current Application Alt ID (in red font) / Child Application Alt ID / ... / Grandchild Application Alt ID

View 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 selecting on the link in Civic Platform.

1. From the **Records** page, find and open a record with the related Right of Way Management Record.
2. Select the **Related records** tab.
3. Select the link under **ROWM Detail**.

4. Log in to the Right of Way Management site to view Right of Way details for the Record.



You need valid credentials to access the Right of Way Management solution. Contact your agency administrator for more information.

Build 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.

Select 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. Find and open the record to which you want to assign the new relationship.
2. Select the **Related records** tab.
3. To find records to relate, select **Look Up**, enter search criteria, and select **Submit**.
4. Select the check box next to the record that you want to designate as parent of the current record.



Note: If you select a record that is part of a different group, not all data may copy from the source to the destination.

5. Select **Select as parent**.



Note: Civic Platform displays the **Record type-specific information** and **General record information** page with a list of data elements. Some data elements allow you to specify which of the selected data elements to copy.

6. Select the check box next to each data element you want to copy from the current record to the parent record. See [Copy and clone record form fields](#) for information about the options.
7. If you select a data element that allows you drill down and select more specific data elements, select the link provided next to the data element (such as **Select**) to choose which of the data elements to copy.



Example: If you select 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.

8. If you select **Status** or **New status**, you can use the list to specify a particular status to copy. Leave the 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 also select it.

- To select all of the options in a list, select the bold option at the head of the list.



Example: You can select the **Select by severity** box if you want to copy all condition severity levels.

- To select certain options in a list, clear the bold option at the head of the list and then select only those options you want to copy.
- Select **OK**.

9. Review your selections.

10. Select **Submit**.



Note: A **Status report** window appears which lists the information that Civic Platform copied successfully and which information Civic Platform could not copy because it belongs to a different group.

After selecting **Submit**, the **Related records** tab for the current record detail page displays the relationships of the current record and its related records, including the newly-assigned parent record.

Select 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 and open the record to which you want to assign the new relationship.
2. Select the **Related records** tab.
3. To find records to relate, select **Look Up**, enter search criteria, and select **Submit**.

4. Select the check box next to the record(s) that you want to designate as a child of the current record.
5. Select **Select as child**.



Note: Civic Platform displays the **Record Type-Specific Information** and **General Record Information** page with a list of data elements. Some data elements allow you to specify which of the selected data elements to copy.

6. Select the check box next to the data elements you want to copy from the current record to the child record. See [Copy and clone record form fields](#) for information about the options.
7. If you select a data element that allows you drill down and select more specific data elements, select the link provided next to the data element (such as **Select**) to choose which of the data elements to copy.



Example: If you select 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 bold option at the head of the list.



Example: You can select the **Select by severity** box if you want to copy all condition severity levels.

- To select certain options in a list, clear the bold option at the head of the list and then select only those options you want to copy.
- Select **OK**.

8. If you select **Status** or **New status**, you can use the list to specify a particular status to copy. Leave the 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 also select it

9. Review your selections.
10. Select **Submit**.



Note: A **Status report** window appears which lists the information that Civic Platform copied successfully and which information Civic Platform could not copy because it belongs to a different group.

After selecting **Submit**, the **Related records** tab for the current record detail page displays the relationships of the current record and its related records, including the newly-assigned parent record.

Clone a record

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 its child. When you clone more than one record from a source parent, each cloned record is a sibling to the others.

Cloned a single record from the Related records tab

To clone a single record from the Related records tab

1. Find and open the record you want to clone.
2. Select the **Related records** tab.
3. Select **Clone sgl.**
4. (Optional) Select either **Create one record for all parcels**, or **Create one record for each parcel**.
5. (Optional) To filter the list of record types, select a module from the **Select module** list.
6. Do one of the following to locate the desired record:
 - In the **Search record type field**, type any part of a record type name. In the list of matches, select the desired record type.
 - Locate the desired record type in the record type list and select it.
7. Select **Create record**.
8. Select the check box next to each data element you want to include in the cloned record. See [Copy and clone record form fields](#) for details.



Important: Review your selections carefully. Once the record is cloned, any errors must be corrected manually.

9. Select **Continue**.
10. Complete the required fields and others as needed.



Note: Civic Platform may populate some fields from the original record. You can modify the data as needed.

11. Select **Submit**.

Clone multiple records from the Related records tab

To clone multiple records from the Related records tab

1. Find and open the record you want to clone.
2. Select the **Related records** tab.
3. Select **Clone mult**.
4. In the **# of clones per record type** field, enter the number of clones to create.
5. (Optional) To specify a set for the clone, do one of the following:
 - Select **New set** to clone to a new set. Complete the required fields and others as needed, and then select **Submit**.
 - Select **Existing set** to clone to an existing set. Complete the required fields and others as needed, and then select **Submit**. Select the check box next to the desired set, and then select **Submit**.



Note: The selected set number is populated into the **Clone to set** field. To remove the set number, select **Clear**.

6. In the **Record type** tree, select the desired record type.
7. Select the >> button to add your selection to the list of selected record types.
8. (Optional) To add more record types, repeat steps 6 and 7.



Notes:

- When you add more than one record type to the list of selected record types, Civic Platform creates one record for each type selected.
- To remove a record from the list of selected record types, select the record and then select the << button.

9. Select **Submit**.
10. Select the check box next to each data element you want to include in the cloned records. See [Copy and clone record form fields](#) for details.



Important: Review your selections carefully. Once the record is cloned, any errors must be corrected manually in each cloned record.

11. Select **Submit**.

Clone records from the Record tab

To clone records from the Record tab

1. Find and open the record you want to clone.
2. Select the **Record** tab.
3. Hover over the **Menu** button and select **Clone**.
4. In the **# of clones per record type** field, enter the number of clones to create.
5. (Optional) To specify a set for the clone, do one of the following:
 - Select **New set** to clone to a new set. Complete the required fields and others as needed, and then select **Submit**.
 - Select **Existing set** to clone to an existing set. Complete the required fields and others as needed, and then select **Submit**. Select the check box next to the desired set, and then select **Submit**.



Note: The selected set number is populated into the **Clone to set** field. To remove the set number, select **Clear**.

6. In the **Record type** tree, select the desired record type.
7. Select the **>>** button to add your selection to the list of selected record types.
8. (Optional) To add more record types, repeat steps 6 and 7.

**Notes:**

- When you add more than one record type to the list of selected record types, Civic Platform creates one record for each type selected.
- To remove a record from the list of selected record types, select the record and then select the **<<** button.

9. Select **Submit**.
10. Select the check box next to each data element you want to include in the cloned records. See [Copy and clone record form fields](#) for details.



Important: Review your selections carefully. Once the record is cloned, any errors must be corrected manually in each cloned record.

11. Select **Submit**.

Update 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 and open the parent record containing the new data that you want to update.
2. Select the **Related records** tab.
3. Select the check box next to the records you want to update.
4. Select **Update related records**.
5. Select the check box next to the data elements you want to update. See [Copy and clone record form fields](#) for information about the options.



Note: Some elements may have an additional option to drill down to more specific data. For example, if you select **Contact**, you can select the **Select** link to specify which contact types to update.

6. If you select **Status** or **New status**, you can use the list to specify a particular status to update. 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. Select **Submit**.
8. View the record detail summary screen and confirm the updates.
9. Select **Submit**.
10. Select **Submit**.
11. Select **OK**.

Create a set of related records

You can create a new set of related records for easy record management.

To create a set of related records

1. Find and open the parent record with which you want to work.
2. Select the **Related records** tab.
3. Select the check box next to each record that you want to add to the new set.
4. Select **Create a set**.
5. Complete the required fields and others as needed. See [Create a new set](#) for more information.
6. Select **Submit**.



Note: See [Sets](#) for more information about sets.

Copy record data

You can copy data from an existing record to another record, 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 be copied to the new record. Civic Platform cannot copy exam items with a **Scheduled** or **Completed** status.



Note: Copying does not impact existing record relationships.

To copy record data to an existing record

1. Find and open the record from which you want to copy.
2. Select the **Copy** tab.
3. Do one of the following:
 - In the **Copy to record** field, enter the Record ID of the target record.
 - In the **Copy to a set** field, enter the record ID of the target set.



Tip: You can search for the Record ID by selecting the **Search** button .

4. Select the check box next to each data element you want to copy to the existing record or set. See [Copy and clone record form fields](#) for information about these options.



Note: Some elements may have an option to drill down to more specific data. For example, if you select **Contact**, you can select the **Select** link to specify which contact types to copy.

5. Select **Submit**.

Remove record relationships

You can terminate the relationship between two records as needed.

To remove a record relationship

1. Find and open the record for which you want to modify the relationship.
2. Select the **Related records** tab.
3. Select the check box next to each record with a relationship you want to remove from the current record.
4. Select **Delete**.

Copy and clone record form fields

The following tables lists options you may see when you copy or clone a record.

**Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Fields for Clone mult only

Field	Description
# of clones per record type	The number of clones that you want to create from the source record.
Clone to set	Use the New set or Existing set buttons in the toolbar to populate this field with the destination set for the clone.

Cloning options for Record type - specific information

Option	Description
Fee items	Copies fee items from the source record to the target record. Select the Select link to specify specific fee items to copy.
Workflow status	Copies workflow status from the source record to the target record.
Inspection	Copies inspections from the source record to the target record. Select the Select link to specify inspections by inspection status.
Custom fields	Copies information in custom fields from the source record to the target record. Select the Select link to specify custom fields to copy.
Additional info	Copies additional information from the source record to the target record.
Valuation calc	Copies valuations from the source record to the target record.
Workflow task specific information	Copies workflow task-specific information from the source record to the target record.
Status or new status	Copies the record status from the source record to the target record. To set a new status value, select an option from the New status list in addition to selecting the check box next to Status or new status .
Status history	Copies status history data from the source record to the target record.

Option	Description
This option is only available if the Status or new status option is selected.	

Cloning options for General record information

Option	Description
Record details	Copies some record detail fields from the source record to the target record. Select the Set application description link to edit the application name and application description for both the source record and the target record.
Parcel	Copies parcels from the source record to the target record.
Owner	Copies owners from the source record to the target record.
Address	Copies addresses from the source record to the target record.
Assets	Copies assets from the source record to the target record.
Licensed professionals	Copies licensed professionals from the source record to the target record. Select the Select link to specify licensed professionals by type.
Contact	Copies contacts from the source record to the target record. Select the Select link to specify contacts by type.
Document	Copies documents (attachments) from the source record to the target record.
Preserve dates	Copies both the opened date and the reported date from the source record to the target record. If you do not select this option, the Opened date field on the target record displays the date that the record was cloned/copied.  Notes: - When cloning or copying, the Close date does not copy to the target record(s). - The record status date clones/copies only when you clone or copy the record status, independent of the Preserve dates option.
Record conditions	Copies conditions from the source record to the target record. Select the Select link to specify conditions by severity and/or by condition status.
Inspection conditions	Copies inspection conditions from the source record to the target record. Select the Select link to specify conditions by severity and/or by condition status.
Conditions of approval	Copies conditions of approval from the source record to the target record. Select the Select link to specify conditions by severity and/or by condition status.

Option	Description
Education	Copies education data from the source record to the target record.
Continuing education	Copies continuing education data from the source record to the target record.
Examination	Copies examinations from the source record to the target record.
Record comments	Copies record comments from the source record to the target record.
Activities	Copies activities from the source record to the target record.

Reports

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.

Access and run reports

You can access Civic Platform reports in two ways:

- From a **Reports** page.
- From a list page.



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.

Access and run a report via a reports page

If configured, you can access a **Reports** page from the **Launchpad**. The reports listed in on this page are usually 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 a Reports page

1. Select the **Launchpad** and select the report page of your choice.
2. Select the right arrow next to the report category to expand it.



Note: If the report you want to run is a report you use regularly, you can add it to your **My Reports** category by right-clicking the report and choosing **Add to my reports**. See [Create your own reports category](#) for more information.

3. Select the report you want to run.



Note: If the report requires additional parameters, Civic Platform prompts you to enter the needed parameters.

4. Enter required parameters for the report and select **Submit**. For information on using parameters, see [Specify report parameters](#).



Note: Civic Platform runs the report and displays it in a new window.

Access and run a report via a list page

Your agency may elect to enable a **Reports** menu button on the toolbar or your list pages. This option provides users with ready access to reports specific to that list page.



Note: Contact your agency administrator about which list pages 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 page. For example, choose a record, then choose the **Record detail** from the **Report** menu on the record detail form page. 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 list page. 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 [for more information](#)

To access reports via a list page

1. Open the list page in which you want to work.
2. Hover your mouse cursor over the **Reports** menu button to expand the menu.
3. Select the report you want to run.



Note: If the report requires additional parameters, Civic Platform prompts you to enter the needed parameters.

4. Enter the parameters for the report and select **Submit**. For information on using parameters, see [Specify report parameters](#).



Note: 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)**. When you do, 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, contact your agency administrator.

Create your own reports category

A category called **My reports** is available on **Reports** pages. You can copy any of the reports listed on this page's categories and save them to your personal **My reports** category, which enables you to create a list of the reports that you use most.

To add a report to the My Reports category

1. Open a report page from the launchpad.
2. Expand the reports category that contains the report that you want to add.
3. Right-click the report you want to copy to the **My reports** category.
4. Select **Add to my reports**.

To remove a report from the My Reports category

1. Open a report page from the launchpad.
2. Expand the **My reports** category.
3. Right-click the report you want to remove and select **Remove from my reports**.



Note: When you remove a report from the **My reports** category, Civic Platform does not remove the report from the category where it originated and the report is still available.

Specify report parameters

When an agency administrator sets up a report, they can elect to include provided parameters which do not require user input. They can also elect to include parameter prompts, which allow you to define certain parameters for a report when you run it. If you have questions about your reports set up, contact your agency administrator.

When Civic Platform prompts you to specify parameters, you have the opportunity to filter the data used in the report.



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 list fields, 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 list fields, 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.

Send a report by email

Your agency administrator can configure reports for email distribution to contacts available via a record detail page. 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 email a report automatically, 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.



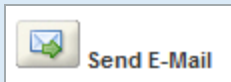
Note: You cannot send reports exceeding 5 MB by email.

To send a report by email

1. Run a report from the **Reports** menu.



Note: Civic Platform displays a **Report preview** page with a **Send email** button at the top.



Send E-Mail

2. Select **Send E-mail**.
3. From the **Send email report** dialog, select each contact to whom you want to send the report.



Notes:

- If the recipient you want to select is not on the list, select **Other** and enter their email in the designated box.
- You can also manually enter any alternate email addresses or email addresses that



are missing in the designated box.

- **IMPORTANT:** When entering more than one email address in a box, separate each address with a semicolon.

4. Select **Submit**.

Sets

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** page displays a tab for each set type and provides set details that accommodate the functionality for each. Although the pages 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.

Create 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. From the **Sets** page, select the tab in which you want to create a set. (For example, select the **Records** tab to create a record set or the **Parcel** tab to create a parcel set.)
2. Select **New**.
3. Complete the fields with available data.
4. Select **Submit**.



Note: If you want to add set members to the set, see [Add set members to a set](#).

Apply conditions to a set

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](#).



Note: An agency administrator must enable this feature. Contact your agency administrator if you have questions.

To apply conditions to a set

1. From the **Sets** page, open the set to which you want to apply a condition.
2. Select the **Conditions** tab.
3. Select **New**.
4. Complete the required fields and others as needed.
5. Select **Submit**.

Add a comment to a set

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.



Note: An agency administrator must enable this feature. Contact your agency administrator if you have questions.

To apply a comment to a set

1. From the **Sets** page, open the set to which you want to add a comment.
2. Select the **Comments** tab.
3. Select **New**.
4. Do one of the following:
 - Select **Standard comment** to select a predefined comment.



Note: You can edit or add to a standard comment as needed.

or

- Add a comment.
5. Select **Submit**.

Add or remove a licensed professional for a set

When adding licensed professionals to a set, the licensed professionals are applied to set members simultaneously. They display on the **Licensed prof** tab for the set. For more information about licensed professionals, see [Licensed Professionals](#).



Note: An agency administrator must enable this feature. Contact your agency administrator if you have questions.

To add or remove a licensed professional

1. From the **Sets** page, select the **Licensed prof** tab.
2. Do one of the following:
 - To add a licensed professional, select **New**, complete the required fields and others as needed, and select **Submit**.
 - To delete one or more licensed professionals, select the check boxes next to the licensed professional(s) you want to remove, then select **Delete**.

Add owners to a set

When adding 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 [Add, view, and associate owners](#).



Note: Your agency must enable this feature. Contact your agency administrator with any questions.

To add or remove an owner

1. From the **Sets** page, open the desired set.
2. Select the **Owners** tab.
3. Do one of the following:
 - To add an owner:
 1. Select **New**.
 2. Complete the required fields and others as needed.
 3. Select **Submit**.
 - To delete an owner:
 1. Select the owner(s) to remove.
 2. Select **Delete**.

Add contacts to a set

When adding 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](#).



Note: Your agency must enable this feature. Contact your agency administrator with any questions.

To manage contacts for a set

1. From the **Sets** page, select the **Records** tab.
2. Open the set to which you want to apply a contact.
3. Select the **Contacts** tab.
4. Do one of the following:
 - Add a new contact:
 1. Select **New**.
 2. Complete the required fields and others as needed, then select **Submit**.
 - Associate an existing contact:
 1. Select **Look up**.
 2. Enter search criteria and select **Submit**.
 3. Select the check box next to the contact(s), and select **Select**.
 4. Enter the date that the contact becomes active to all set members, and select **OK**.
 - Delete a contact:
 1. Select the check box next to the contact(s) to remove.
 2. Select **Delete**.
 - Deactivate a contact:
 1. Select the check box next to the contact(s) to deactivate.
 2. Select **Deactivate**.
 3. Enter the date that the contact becomes inactive to all set members, and select **OK**.

Clone a set

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. From the **Sets** page, select the check box next to the set you want to clone.
2. Select **Clone**.
3. Enter available data in the fields and select the information you want to clone. See [Set cloning field descriptions](#) for field definitions.
4. Select **Submit**.



Note: Depending on your selection, you may be prompted whether you are cloning a fee or a parcel.

- If you select fees, select **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 select **Submit**.

5. Select **Return**.

Delete 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. From the **Sets** page, select the tab containing the set you want to delete.
2. Select the check box next to each set that you want to delete.
3. Select **Delete**.

Maintain existing sets

Sets enable you to group related records, parcels, addresses, or licensed professionals so that you can process the group as a batch. After you have created sets (see [Sets](#) for more information), you can begin to do more things with them. This includes adding set member, editing the set name and comments, deleting records from the set, and more. The following sections are things you can do with existing sets.

Add 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. From the **Set** page, find and open the desired set.
2. Select the **Set member** tab.
3. Select **Look up**.



Note: If you add a record to a record set, select **Look up record**.

4. Enter the search criteria to locate the records, parcels, addresses, or licensed professionals you want to add.



Note: You can add external parcels as set members of a parcel set, or add external addresses as set members of an address set.

5. Select **Submit**.
6. Select each record or object that you want to add to the set.
7. Select **Submit**.



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.

Clone a record within a set

You can create a new record by cloning an existing set record.

To clone a set record

1. From the **Set** page, find and open the desired set.
2. Select the **Set member** tab.
3. Select the record that you want to clone. You can clone only one record at a time.
4. Select **Clone**.
5. Specify the number of clones to create.
6. Select the data elements that you want to copy from the source record to the newly created clone(s).
7. If you select a data element that allows you to drill down further and select more specific data elements, select the hyperlink provided next to the data element (such as **Select**) to launch a dialog that allows you to choose which data elements to copy.



Example: If you select 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.

8. Do one of the following:
 - 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.

9. Select **OK**.
10. If you select **Status or New status**, you can use the dropdown list to specify a particular status to copy. Otherwise, leave the dropdown 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. Select **Submit**.



Note: Civic Platform numbers each cloned record in sequence +1 from the original record.

Edit set name and comments

1. From the **Set** page, find and open the desired set.
2. Edit the fields as needed.
3. Select **Submit**.

Delete records from a set

1. From the **Set** page, find and open the desired set.
2. Select the **Set member** tab.
3. Select the check box next to each record that you want to remove from the set.
4. Select **Delete**.

Change 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. Contact your agency administrator with questions.

To change the status of set members

1. From the **Set** page, select the **Records** tab.
2. Open the set to which you want to apply a change of status.
3. Select the **Status** tab.

4. Complete the required fields and others as needed.

Field	Description
Action by	Use the list menu to select the user who is changing the status for the set.
Action by department	Use the list menu to select the department from which the status request originated.
Comments	Enter any comments regarding the change of status.
New status	Use the list menu to select the status for the set members.
Status date	Enter the date or use the calendar to select the date of the change of status.

5. Select **Save**.

View the set status history

Use the Set status history tab on the Set detail page 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. From the **Sets** page, open the set from the **Records** tab that you want to view.
2. Select the **Set status history** tab.

Attach documents to a set

You can use the **Documents** secondary tab on the **Set** detail page 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 [Attach files](#) for information about attaching documents to a record or a set.

View record sets

The Set tab on the Record detail page 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 select the set ID link for a set, you can access the Set detail page directly.

To access the Set tab for a record

- 1. From the **Record** page, find and open the desired record.
- 2. Select the **Set** tab.
- 3. To view set details, open the set you want to see.

Update 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. From the **Record** page, find and open the desired record.
- 2. Select the **Status** tab.
- 3. Update the required fields and others as needed.

Field	Description
Record type	Choose a record type that you want to change its task status.
Task	Choose a task whose status you want to change.
Status from	Use to filter by a former status value.
Status to	Use to filter by a new status value.
Status date	Use to filter by the date when the task reached its current status.
Action by department	Use to filter by the department that last updated the task status.
Action by	Use to filter by the individual who last updated the task status.
Comments	Use to add the comments for the task status update.

- 4. Select **Save**.

Copy 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. From the **Set** page, find and open the desired target set.
2. Hover over the **Look up** button and select **Look up set**.
3. Enter search criteria as needed to locate the source set from which you want to copy set members.
4. Select **Submit**.
5. Select the set that you want to use as your source set.
6. Select **Select**.

Create records from parcel sets

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.



Note: An agency administrator must enable this feature. Contact your agency administrator with questions.

To create a Record from a parcel set

1. From the **Sets** page, select the **Parcels** tab.
2. Open the parcel set for which you want to generate a record.
3. Select the **Create records** tab.
4. Complete the required fields and others as needed. See [Record creation field descriptions](#) for field definitions.
5. Select **Submit**.



Note: All rejected parcels display in the **Parcel set list** page under the **Rejected parcel set ID**.

Import 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 select the **GIS import** button to open the map viewer and select the applicable parcels for your set.

To import parcels from GIS

1. From the **Set** page, select the **Parcels** tab.
2. Open the parcel set to which you want to add parcels from GIS.
3. Select the **Set member** tab.
4. Select **GIS Import**.
5. Select the parcels from the **Map** viewer.
6. Select **Send features to AA** from the list menu.
7. Select **Submit**.
8. Select the check box next to each parcel that you want to add to the parcel set.
9. Select **Submit**.

Allocate 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 [Begin, continue, and end a cashier](#)



[session](#). For more information about accepting and allocating set payments, see [Accept and allocate set payments](#).

To accept and allocate set payments

1. From the **Set** page, find and open the set you want.
2. Select the **Payment** tab.
3. Select **Pay**.



Note: In order to process a negative fee item on a record in a set, your agency administrator must configure that feature in the system. Contact your agency administrator with any questions.

4. Complete the fields with available data as required. See [Payment details for a set](#) for field definitions.
5. Select **Submit**.



Note: If you did not start a cashier session, Civic Platform displays a cashier session pop-up window. See [Begin, continue, and end a cashier session](#) for more information.

6. If you are receiving a payment for the entire balance, select **Full pay**.



Note: 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.

7. Select **Submit**.



Notes:

- 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.
- If Civic Platform displays the receipt in a separate window, you can print the receipt as needed. Close the window when you finish.
- 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.

Generate 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. From the **Set** page, select the **Set type** tab that holds the applicable set.
2. Open the set to which you want to run a report.
3. Select the **Set member** tab.
4. Select the check box next to the set members for which you want reports generated.
5. Select **Reports**.
6. Select a report from the field list.

Execute a script for sets

Civic Platform provides the ability to run a preconfigured EMSE (event manager and script engine) script from the **Set** detail page on set members for record, parcel, address, and licensed professional sets.



Note: This feature requires configuration by an agency administrator. If you have problems executing a script, contact your agency administrator.

1. Open the **Set** page.
2. Select the set type tab which holds the applicable set.
3. Choose the set to which you want to execute a script.
4. Select the **Set** tab.
5. Select **Execute script**.
6. Select a script from the list.

Perform 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](#).

Create and administer set of sets

You can create a set of sets by combining record sets, enabling you to use batch processing for multiple record sets.

You can also analyze sets and fees (see [Analyze sets and fees](#)) and process payments (see [Process payments](#)).



Examples:

- You can identify and pay unpaid invoiced fee items for multiple record sets simultaneously.
- 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 and verifying fees, and processing fee payments.



Note: Your agency administrator must configure the sets of sets feature in order to use this feature. Please refer to your agency administrator with any questions.

Create 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. From the **Sets** page, select the **Sets** tab.
- 2. Select **New**.
- 3. Complete the required fields and others as needed:

Field name	Action
Set ID	Civic Platform automatically generates a code for the set of sets. If you want to change the ID, enter a unique alphanumeric abbreviation.
Set name	Enter a name that identifies the set of sets. If you enter an existing name, Civic Platform displays a warning message.
Comment	Enter any comments that identify the set of sets or explain its purpose.

- 4. Select **Submit**.
- 5. Select the **Set member** tab on the **Set of sets** detail page.
- 6. Select **Look Up**.
- 7. Complete the fields in the **Record Set** search page and select **Submit**.
- 8. Select the set that you want to add to the set of sets and select **Submit**.

Delete 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. From the **Sets** page, select the **Sets** tab.
- 2. Select the sets of sets that you want to delete and select **Delete**.

Associate 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. From the **Sets** page, select the **Sets** tab.
- 2. Select the set of sets to which you want to add set members.
- 3. Select the **Set member** tab.

4. Select **Look up**.
5. Complete the fields in the **Record Set** search page and select **Submit**.
6. Select the sets that you want to add to the set of sets and select **Submit**.

View set of sets members

You can view set member records and record details using the Set Member tab.

To view record set members

1. From the **Sets** page, select the **Sets** tab.
2. Select the set of sets for which you want to view set members.
3. Select the **Set member** tab.
4. To view record details for a particular set, select a set ID.

Remove 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. From the **Sets** page, select the **Sets** tab.
2. Select the **Set member** tab on the set of sets detail page.
3. Select the record set that you want to remove from the associated set of sets and select **Delete**.

Analyze sets and fees

With a set of sets, you can analyze the set and fees using the **Set analysis** tab and **Fee analysis** tab respectively.

Analyze sets

The **Set analysis** tab 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 page.

You can easily determine the fee status for set of set record members using the **Set analysis** page. 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. From the **Sets** page, select the **Sets** tab.
2. Open the set of sets for which you want to view set analysis.
3. Select the **Set analysis** tab.
4. Review the fields for the selected set of sets. See [Set analysis field descriptions](#) for field descriptions.



Note: The field values in **Set analysis field descriptions** only display if configured by your agency. Contact your agency administrator with any questions.

Analyze 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 on the **Fee analysis** page.

To view fee analysis information

1. From the **Sets** page, select the **Sets** tab.
2. Select the set of sets for which you want to view set analysis.
3. Select the **Fee analysis** tab.
4. Review the fields for the selected set of sets. For field descriptions, see [Fee analysis fields](#).

Process 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 page 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** page.

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 selecting the **Submit** button on the **Pay** page. Use the buttons at the top of the page to **Submit**, **Reset**, or **Cancel** payments.

To make specific fee item payments

1. From the **Cashier Session** page, select **New session**.
2. Select the **Sets** main link
3. Select the **Sets** tab.
4. Select the set of sets for which you want to make a payment.
5. Select the **Payment** tab.
6. Review the fields for the selected set of sets. For field descriptions, see [Payment details for a set](#).
7. Select **Fee Items Pay** at the top of the page.
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. Select **Submit**.



Note: 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 processing fields](#).

Make full payments with the pay button

You can pay record set member invoice amounts in full as necessary.

To make a full payment

1. From the **Cashier Session** page, select **New session**.
2. Select the **Sets** main link
3. Select the **Sets** tab.
4. Select the set of sets for which you want to make a payment.
5. Select the **Payment** tab.
6. Review the fields for the selected set of sets. For field descriptions, see [Payment details for a set](#).
7. Select **Pay** at the top of the page.



Note: Civic Platform displays the **Pay** page and populates the **Amount** field with the total invoice balance due.

8. Complete the fields on the **Pay** page and select **Submit**. For a list of field descriptions, see [Payment processing fields](#).

Make partial payments with the pay button

1. From the **Cashier session** page, select **New session**.
2. Open the Sets page and select the **Sets** tab.
3. Select the set of sets for which you want to make a partial payment.
4. Select the **Payment** tab.
5. Review the fields for the selected set of sets. For field descriptions, see [Payment details for a set](#).
6. Select **Pay** at the top of the page.
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 select **Submit**.
8. Complete the fields on the **Apply payment** page. For a list of field descriptions, see [Apply partial payment fields](#).
9. Select **Save**.



Note: 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. Select **OK**.

Void a payment

- 1. From the **Cashier Session** page, select **New session**.
- 2. Select the **Sets** main link
- 3. Select the **Sets** tab.
- 4. Select the set of sets for which you want to make a partial payment.
- 5. Select the **Payment** tab.
- 6. Locate the **Transactions** section, select the payment you want to void, then select **Void**.
- 7. Enter any comments related to the voided transaction, such as a reason for the void transaction.
- 8. Select **Submit**.

Set details

The following tables list and define the default fields available on the different pages you may encounter when working with sets.

**Important:** Because your Civic Platform installation has been configured to meet your agency’s specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Set cloning field descriptions

The following fields are available by default when cloning a set.

Field	Description
Application Specific Information	Select this option to clone the Application Specific Information for each set member.
Additional Info	Select this option to clone the additional information for each set member.
Contacts	Select this option to clone the contacts for each set member.
Fees	Select from the following options. Clone All Fees: Select this option to clone all fees for all set members. Prompt for Each Member: Select this option to prompt for fee transfer come up for each set member. Click OK to transfer the fees for the set member, Click Cancel to

Field	Description
	reject the transfer of fees for the set member. Do Not Clone Fees: Select this option to reject the cloning of fees for set members.
From (Record ID)	Select the first Record ID in the range of Records you want to clone.
Inspection Conditions	Select this option to clone the inspection conditions for each set member.
Inspections	Select this option to clone the inspections for each set member.
To (Record ID)	From the drop-down list, select the end record ID in the range of records you want to clone.
Licensed Professionals	Select this option to clone the licensed professionals for each set member.
Locations	Specify how you want to handle Address and Parcel information. No Prompting: Civic Platform clones parcel and address information for each set member. (default) Prompt for Parcel: Civic Platform prompts the user to select parcels for each set member when cloning occurs. Prompt for Address: 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.
No. of Clones	Enter the number of records that you want to clone for each set member.
Preserve Dates	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.
Record Conditions	Select this option to clone the record conditions for each set member.
Related Records	Select this option to attach related records for each set member to the cloned record.
Status	Select the status that you want to apply to the cloned records.
Structure	Select this option to clone the structure for each set member.
Use Current Parcel Owner	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.
Workflow Status	Select this option to clone the workflow status for each cloned set member.
Workflow Task Specific Info	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.

Field	Description
Create new Record SET	Generates a new record set from the records created from the parcel set.
New Record SET ID	The Record SET ID for the new record set in this field. This field becomes enabled when you select the Create new Record SET option.
Parcels, Addresses, or Owners Locked	Use to define record creation parameters. Options are: Include: Generates records for all parcels independent of parcel or parcel address current conditions. Exclude: Generates records for all parcel set members except for parcels/parcel addresses with a lock condition applied). Reject: Generates records for all parcels set members except for parcels or parcel addresses with a 'Locked' condition applied.
Pending or Disabled Parcels	Use to define record creation parameters. Options are: Include: Generates records for all parcels independent of parcel or parcel address current status. Exclude: Generates records for all parcel set members except for parcels/parcel addresses with a status of Pending or Disabled. Reject: Generates records for all parcel set members except for parcels/parcel addresses with a status of Pending or Disabled.
Permit Type	Use to select the Permit Type required for the new Records.
Rejected Parcels SET ID	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.

Field	Description
Amount	The total payment amount.
Bank Name	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.

Field	Description
CC Auth Code	If you are receiving a credit card payment, this is the credit card number.
CC Exp Date	If you are receiving a credit card payment, this is the credit card's expiration date.
CC Holder Name	If you are receiving a credit card payment, this is the name of the credit card holder as it appears on the credit card.
Check Holder's E-mail	If you are receiving a check payment, this is the email address of the check holder.
Check Holder's Name	If you are receiving a check payment, this is the name of the check holder.
Check Number	If you are receiving a check payment, this is the check number.
Check Type	The check type. For example, company or personal.
City	The city of the payor.
Comment	Comments to help identify or explain the reason for this payment. If there are any special circumstances for this payment, indicate them here.
Country/Region	The country or region of the payor.
Driver's License	The drivers license number of the payor.
Method	The payment method. For example, choose Cash, Check, or Credit Card.
Payor	The name of the payor.
Phone Number	The phone number of the payor.
Received	The manner in which the payment was received. For example, In Person, Mail, or Fax.
Reference #	If you are receiving a check payment, this is the check number.
State	The state where the payor resides.
Trust Account	The number or code that identifies the terminal where you are accepting payment.
Zip	The zip code of the payor.

Set analysis field descriptions

The following fields are available by default for set analysis.

Field	Description
All Fees Paid	The sum of all Record related fees with fully paid invoiced fee items.
Fees Overpaid	The sum of all Record related fees with fully paid invoiced fee items and unapplied credits.

Field	Description
Fees Required	The sum of all Record related fees with at least one unpaid invoiced fee item.
Total Records	The total number of Records in the selected set of sets.
Total Fee Applied	The sum of all the applied fees for Record set members.
Total Fee Invoiced	The sum of all invoiced fees for Record set members.
Total Invoice Balance	The difference between the amount of money invoiced and the amount of money applied: the balance due.
Total Job Value	The total job value for all Records.

Payment processing fields

The following fields are available by default when processing payments for a set.

Field	Description
All Fees Paid	The sum of all Record related fees with fully paid invoiced fee items.
Cashier ID	The ID number for the cashier conducting the session.
Date	The cashier session date.
Set Member Records	The total number of Record set members in the set of sets.
Terminal #	The terminal number for the current cashiering session.
Total Balance	The total balance for all set of set Record members less the total credits.
Total Credits	The total accumulated credits for all set of set Record members.
Total Fee Applied	The sum of all the records for which fees have been applied, or paid.
Total Fee Assessed	The sum of all assessed fees, including invoiced and non-invoiced fees, for each record member in the selected set of sets.
Total Fee Invoiced	The amount of all invoiced fees for each Record member in the set of sets
Total Invoice Balance	This column displays the difference between the invoiced fees and the applied, or paid, fees.
Transactions	Use the check boxes under this heading to select Set payments to void.
Valuation	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.

Field	Description
Amount Per Record	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.
Record Count	The total number of Records that will receive payment.
Fee	The total fee amount.
Fee Code	The code that indicates the type of fee assessed.
Fee Item	The description of the fee item.
Outstanding	The total outstanding balance on invoiced fee items for all Record members.
Paid	The total amount paid on invoiced fee items for all member Records.
Payment Amount	This field is auto-populated based on the amount you enter in the Amount Per Record field. 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. 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.
Quantity	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.

Field	Description
Apply Credit	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.
Apply Payment	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 Full Pay button reallocates amounts in the Apply Credits and Apply Payments fields

Field	Description
	based on the Standard Choice settings.
Available Credit	This field displays available credit for each set of sets Record member with outstanding invoiced fee items.
Fee	The amount to be paid.
Fee Code	The code representing the type of fee assessed.
Fee Item	The description of the fee item.
Invoiced Date	The date the fee item was invoiced.
Invoice #	The fee item invoice number.
Outstanding	The unpaid amount on the invoiced fee item.
Paid	The amount paid towards the invoiced fee item.
Payment Period	The payment period for the invoiced fee item.
Priority	The priority level of the invoiced fee item.
Quantity	This field indicates the quantity of invoiced fee items for individual Records.
Record ID	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.

Field	Description
Record ID	This field displays the Record ID or Alternative ID for all Record members in the selected set of sets.
Total Fee Applied	The sum of the applied amounts for each Record member in the selected set of sets.
Total Fee Assessed	The sum of all assessed fees, including invoiced and non-invoiced fees, for each Record member in the selected set of sets.
Total Fee Invoiced	The amount of all invoiced fees for each Record member in the set of sets.
Total Invoice Balance	This column displays the difference between the invoiced fees and the applied, or paid, fees.

Structures and establishments

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.

**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.

Create, edit, delete structures and establishments

You can create, edit, delete, and activate inactive structures and establishments from the **Structures and establishment** page.

Create 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. From the **Structures and establishments** page, select **New**.
2. Complete the following required fields:

Field	Action
Group	Choose either Structure or Establishment.
Type	Choose a structure type based on the group you selected.

3. Complete the form with available data. See [Structure and establishment details](#) for field definitions.
4. Select **Submit**.

View or edit a structure or establishment

1. From the **Structures and establishments** page, select **Search**.
2. Enter search criteria as needed, then select **Submit**.
3. Select the name of the structure or establishment record you want to view.
4. Modify fields as needed. See [Structure and establishment details](#) for field definitions.
5. Select **Save**.

Delete 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. From the **Structures and Establishments** page, select **Search**.
2. Enter search criteria as needed, then select **Submit**.
3. Select the structure or establishment you want to delete.
4. Select **Delete**.



Note: 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.

Select **Yes** to delete the structure and establishments. Select **No** to delete only the structure.

Activate 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 [View or edit a structure or establishment](#) for instructions.
2. Select the name of the structure or establishment.

3. Set the **Status** field to **Active**.

Associate reference data to structures and establishments

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.

For more information on associating reference data, see:

- [Add a condition to structures and establishments](#)
- [Associate a parcel to structures and establishments](#)
- [Associate an address to structures and establishments](#)
- [Associate an owner to structures and establishments](#)
- [Associate a record to structures and establishments](#)
- [Associate a structure or establishment](#)
- [Associate structures and establishments from records](#)

Add a condition to structures and establishments

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 [View or edit a structure or establishment](#).
2. Select the **Conditions** tab.
3. Select **New**.
4. Complete the required fields and others as needed. See [Conditions form default fields](#) for field definitions.
5. Select **Submit**.

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 [View or edit a structure or establishment](#).
2. Select the **Conditions** tab.
3. Select **New**.



Note: Depending on your administrator's settings, some of the available fields may display the **Standard Condition** hyperlink and data picker.

4. Select the **Standard condition** link.
5. Enter search criteria, then select **Submit**.
6. Select the button next to the standard condition you want to attach to the structure or establishment.



Note: Civic Platform completes the **New condition** form with the values from the standard condition you selected.

7. Select **Submit**.

Remove a condition

1. Find and open the structure or establishment from which you want to remove a condition. See [View or edit a structure or establishment](#).
2. Select the **Conditions** tab.
3. Select the check box next to the condition you want to remove.
4. Select **Delete**.

Associate a parcel to structures and establishments

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.

Associate 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 and open the structure or establishment to which you want to associate a parcel. See [View or edit a structure or establishment](#).
2. Select the **Parcels** tab.
3. Select **Look Up**, enter search criteria as needed, and select **Submit**.
4. Select the check box next to the parcel(s) you want to associate to the structure or establishment.
5. Select **Select**.
6. Select **Submit**.

Associate 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 [Associate a parcel to a structure](#).

To associate a parcel to an establishment

1. Find and open the establishment to which you want to associate a parcel. See [View or edit a structure or establishment](#).
2. Select the **Parcels** tab.
3. Select **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. Select **Select**.
 - 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 [Associate a parcel to a structure](#).
4. Select the check boxes next to the parcel(s) you want to associate to the establishment record.
 5. Select **Select**.

Remove a parcel

1. Find and open the structure or establishment to which you want to associate a parcel. See [View or edit a structure or establishment](#).
2. Select the **Parcels** tab.
3. Select the check box next to the parcel you want to remove.
4. Select **Delete**.

Associate an address to structures and establishments

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.

Associate an address to a structure

1. Find and open the structure to which you want to associate an address. See [View or edit a structure or establishment](#).
2. Select the **Addresses** tab.

3. Select **Look Up**, enter search criteria as appropriate, and select **Submit**.
4. Select the check box next to the addresses you want to associate with the structure.
5. Select **Select**.

Associate 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 [Associate an address to a structure](#).

To associate an address to an establishment

1. Find and open the establishment to which you want to associate an address. See [View or edit a structure or establishment](#).
2. Select the **Addresses** tab.
3. Select **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. Select **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 [Associate an address to a structure](#).
4. Select the addresses you want to associate with the establishment record.
5. Select **Select**.

Remove an address

1. Find and open the structure or establishment from which you want to remove an address. See [View or edit a structure or establishment](#).
2. Select the **Addresses** tab.
3. Select the check box next to the address(es) you want to remove.

4. Select **Delete**.

Associate an owner to structures and establishments

1. Find and open the structure or establishment to which you want to associate an owner. See [View or edit a structure or establishment](#).
2. Select the **Owners** tab.
3. Select **Look Up**, enter search criteria as appropriate, and select **Submit**.
4. Select the check box next to the owner(s) to be added to the structure or establishment record.
5. Select **Select**.

Remove an owner

1. Find and open the structure or establishment from which you want to remove an owner. See [View or edit a structure or establishment](#).
2. Select the **Owners** tab.
3. Select the check box next to the owner you want to remove from the structure or establishment.
4. Select **Delete**.

Associate a record to structures and establishments

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 and open the structure or establishment to which you want to associate a record. See [View or edit a structure or establishment](#).
2. Select the **Records** tab.
3. Select **Look Up**, enter search criteria as appropriate, and select **Submit**.
4. Select the check box next to the record you want to add to the structure or establishment record.
5. Select **Select**.

Remove a record

1. Find and open the structure or establishment from which you want to remove a record. See [View or edit a structure or establishment](#).
2. Select the **Records** tab.
3. Select the check box next to the record you want to remove from the structure or establishment.
4. Select **Delete**.

Associate 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 and open the structure or establishment to which you want to associate another structure or establishment. See [View or edit a structure or establishment](#).
2. Select the **Structures & establishments** tab.
3. Select **Look Up**, enter search criteria as appropriate, and select **Submit**.
4. Select the check box next to the structure or establishment you want to associate.
5. Select **Select**.

Remove 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 and open the structure or establishment to which you want to associate another structure or establishment. See [View or edit a structure or establishment](#).
2. Select the **Structures & establishments** tab.
3. Select the check box next to the structure or establishment you want to remove.
4. Select **Delete**.

Associate structures and establishments from 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 [Record application intake form sections](#).

To add structures and establishments from a record

1. Find and open the record you want to work with.
2. Select the **Structures & establishments** tab.
3. Select **Look Up**, enter search criteria as appropriate, and select **Submit**.
4. Select the check box next to the structures and/or establishments you want to associate to the record.
5. Select **Select**.

 **Note:** If there are conditions applied to any of the selected structures or establishments, Civic Platform displays those conditions in a dialog.

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.

 **Important:** Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

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.

Field	Description
Group	This is the group of objects you want to work with.
Type	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.
ID	This is the ID number of the structure or establishment.

Field	Description
Name	This the name of the structure or establishment.
Status	This is the status of the structure or establishment. Options vary by agency.
Status Date	This a date range during which the structure or establishment you are searching for had a specified status.
Land Use	This defines how the land is used. Options vary by agency.
Description	This is a narrative description of the structure or establishment.
X Coordinate	The location of the structure or establishment on the horizontal axis of a land grid, if your agency uses this type of mapping.
Y Coordinate	The location of the structure or establishment on the vertical axis of a land grid, if your agency uses this type of mapping.
Height	The height of the structure or establishment.
Date Built	A date range during which the structure or establishment you are searching for was built.
Front Dimension	The dimensions of the structure or establishment's facade.
Rear Dimension	The dimensions of the structure or establishment's rear surface.
Side Dimension 1	The dimensions for one of the structure or establishment's side surfaces.
Side Dimension 2	The dimensions for one of the structure or establishment's side surfaces.
Total Floors	The number of floors in the structure or establishment.
1st Floor Area	The total area of the first floor of the structure or establishment.
Total Floor Area	The total area of all the floors in the structure or establishment.
# of Rooms	The total number of rooms in the structure or establishment.
Baths	The total number of bathrooms in the structure or establishment.
Beds	The total number of bedrooms in the structure or establishment.
Garage	This indicates whether the structure or establishment has garage facilities.
Pool	This indicates whether the structure or establishment has a swimming pool.
Floor	The floor number on which the structure or establishment is located.
# of Employees	The total number of employees of the structure or establishment.
# of Residential Units	The total number of residential units in the structure or establishment.
% of Structure	The percentage of the structure's area taken up by the establishment.
Parcel(s) Area	The area of the parcel or parcels taken up by the structure or establishment.
% of Parcel(s) Area Used by Structure	The percentage of the parcel or parcels occupied by the structure.
Record Status	The status of the record. Options include Active or Inactive .

Time accounting tracker

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.

- N** User cannot delete or make changes to the entry.
- D** User may delete this entry.
- E** User can make changes to any of the fields that are not displayed as read-only.
- DE** The user may delete this entry or make changes to any of the fields that are not displayed as read-only.

Create a time accounting record

You can create a new time accounting record for a single record or multiple records at a time.



Examples:

- Single record: An inspector completes a single inspection and then enters the time accounting documentation for that record.
- Multiple records: An inspector completes four electrical inspections and enters the time accounting documentation for all four at one time.

You can access the Time accounting page from the Launchpad or from a record (for example, an inspection or a condition assessment).

To create a time accounting record

1. Do one of the following:

- Open the **Time accounting** page.



Note: If you want to add time accounting for inspections or workflow with the enhanced time tracker feature, you must do it from the **Time accounting** page. The **Workflow** or **Inspection** page only allows you to record the time spent.

- Find and open the desired record, select the **Record** tab, and then select the **Time accounting** button.
- From the **Condition assessment** page, open the desired condition assessment. On the **Detail** tab, select the **Time accounting** button.
- From the **Work orders** page, open the desired work order. Select the **Work order task** tab, and then select the ellipsis in the **Time accounting** column for the desired task.

2. Select **New**.3. Complete the required fields and others as needed. See [Time accounting fields](#) for field definitions.

4. To add equipment costs and material costs that occurred during the time accounting period:

1. In the **Equipment/materials** section, select **Add**.
2. Complete the required fields and others as needed. See [Equipments and material cost fields](#) for a list of fields and definitions.
3. To add another row, repeat steps a and b above.



Note: To remove a row, select the check box at the beginning of the row, and then select **Remove**.

5. To add another time accounting record, select **Add**, and repeat steps 3 and 4 above.

Note: If you have added multiple records, the check box for each one is selected by default. If you do not want to save a record, clear its check box.

6. Select **Submit**.

Time accounting details

The table below lists and defines the fields that may be available on the **Time accounting** page. Fields are listed in alphabetical order (default names are used).



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.

Time accounting fields

Field	Description
Billable	Defines whether the agency can bill for this type.
Cost	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: $\text{Cost} = \text{Hourly Rate} * \text{Percent} * \text{Time Elapsed}$ If you specify time value in Detail Time Elapsed, Civic Platform calculates the cost with this formula: $\text{Cost} = \text{Hourly Rate} * \text{Percent} * (\text{Cost Factor \#1} * \text{Detail Time Elapsed \#1} + \text{Cost Factor \#2} * \text{Detail Time Elapsed \#2} + \dots + \text{Cost Factor \#n} * \text{Detail Time Elapsed \#n})$
Cost of Materials	The total cost for the materials used.
Created By	The agency user who added the record. Read-only field.
Created Date	The date when you created the record. Read-only field.
Date Logged	The date that the time accounting record is logged.
Detail Time Elapsed	The time spent by cost factors for the time accounting.  Civic Platform validates that the total time given to each cost factor is equal to the time in the Time Elapsed field.
End Miles	The number listed on the odometer on the agency vehicle at the end of your use.
End Time	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.
Entity	The actual entity (activity, condition assessment, inspection, workflow, or work order task) you are creating the time accounting record for.

Field	Description
Entity Type	The entity type. If none of the options are applicable, select N/A.
Hourly Rate	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.
Materials	The materials used for this application.
Notes	Comments about the application.
Percentage	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%.
Reference Record	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.
Start Miles	The number listed on the odometer on the agency vehicle at the beginning of your use.
Start Time	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.
Time Accounting Group	The time accounting groups which the user(s) in the User ID field has permission to view or edit.
Time Accounting Type	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.
Time Elapsed	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.
Total Miles	The number of miles logged on the agency vehicle you used during this application.
User ID	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

Field	Description
	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.
Vehicle ID	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

Field	Description
Cost	The field is read-only. Civic Platform automatically calculates the cost according to the formula below: $\text{Total Cost} = \text{Fixed Rate} + \text{Unit Rate} * (\text{Cost Factor \#1} * \text{Quantity \#1} + \text{Cost Factor \#2} * \text{Quantity \#2} + \dots + \text{Cost Factor \#n} * \text{Quantity \#n})$
Cost Item	The cost item.
Cost Date	The date when the cost occurred.
Cost Type	The appropriate cost type, such as: contract, employee, materials.
Fixed Rate	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.
Quantity	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.
Unit of Measure	The unit of measure for the cost item.
Unit Rate	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.

Work orders

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, Civic Platform has a geographic information system (Civic Platform GIS). Use this system to locate addresses of work orders and locate trends on a map.



Example: Several fire hydrants in a neighborhood need to be serviced next month. Start by searching for the hydrant on the Asset portlet and copying the fire hydrant data, including the address, to your new work order. Add parts associated to the asset to the work order along associated part data. If desired, attach a PDF schematic of the fire hydrant. When the work order is complete, 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.

Create, update, print, and manage work orders

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. Select the following for more information:

- [Create a work order](#)
- [View and update work orders](#)
- [Print a work order](#)
- [Manage related work orders](#)

Create 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 page 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 GIS 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 [PM 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.

Create a work order from the work order page

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 from the work order page

1. From the **Work orders** page, select **New**.
2. Choose the type of work order you want to create by selecting an option from the **Work order template** or **Work order type** list field.
3. Select **Create record**.
4. Complete the fields with available data. See [Work order fields](#) for field definitions.
5. Do one of the following to associate an asset with the work order.
 - Use Search to find and associate an asset.
 1. Select **Search**.
 2. Enter search criteria as appropriate.
 3. Select **Submit**.
 4. Select the asset(s) you want to attach to the work order and select **Select**.
 - Use the **GIS**map system to locate and associate an asset.
 1. Select **GIS**.
 2. Use the **GIS** toolbar and map to select a group of assets
 3. Select the item(s) to add to the work order.
 4. Choose **Link objects to work order** from the drop-down list
 5. Select **Submit**.

- Use **Delete** to remove an asset from a work order
 1. Select the asset(s) to be removed from the work order.
 2. Select **Delete**.
- 6. Select **Validate** to validate the fields in the work order.

**Notes:**

- You can skip validation and select **Submit**. Civic Platform will perform validation before submitting the work order.
- 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.

7. Select **Submit**.

Civic Platform returns to the work order list page, and updates the work order record detail tabs.

Create work orders with 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 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. Open the **Work orders** page.
2. Select **Map**.
3. Select the objects you want to include in the work order.
4. Select the check box for each item you want to link to a work order.
5. Select **Create new record**.
6. Choose the type of work order you want to create by selecting an option from the **Work order template** or **Work order type** list field.
7. Select **Create record**.
8. Complete the fields with available data. See [Work order fields](#) for field definitions.
9. Select **Submit**.



Note: Civic Platform creates the work order, unless the work order fields do not 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 [Add, edit, and apply asset conditions](#) for more information.

Create 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. Open the **Assets** page.
2. Select the check box next to the asset(s) for which you want to generate a work order.
3. Select **New WO**.

Civic Platform displays a message informing you that separate work orders will be created for each asset.

4. Select **OK**.

To create a work order in GIS in the assets page

1. Open the **Assets** page.
2. Select the check box next to the asset(s) for which you want to generate a work order.
3. Select **GIS**.

The map displays the selected assets, and lists them on the **Results** panel.

4. Select **Actions** and then select either **Create a work order** or **Create multiple work orders**.
5. Do one of the following:
 - If you selected only one asset, select **OK**.
 - If you selected more than one asset and you want to generate individual work orders for each asset, select **OK**.
 - If you selected more than one asset and you want to generate one work order for all assets, select **Cancel**.



Note: If you select the wrong button by mistake, select **Cancel** on the next page to begin again.

6. Select the **Work order template** and **Record type** from the list menus.
7. Select **Create record**.
8. Complete the fields with available data. See [Work order fields](#) for field definitions.

9. Verify that all assets are attached to the work order in the **Assets** section at the bottom of the page.
10. Select **Submit**.



Note: 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 [Add, edit, and apply asset conditions](#) for more information.

11. Select 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.

View and update work orders

You can view a list of work orders as well as a summary of individual work orders.

Update a work order

You can quickly access a list of work orders that you are responsible for and make changes as needed.

To update work orders

1. From the **Work orders** page, open the work order to update.



Note: You can apply a filter to limit the number of work orders you see by certain criteria. See [Filters](#) for more information

2. Select the **Record** tab.
3. Update the data as needed. See [Work order fields](#) for field definitions.
4. Select **Submit**.

View 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. From the **Work orders** page, find and open the work order for which you want to view the summary.
2. Select the **Summary** tab.



Note: To update the work order, select the **Record** tab and edit the data as needed. Select **Submit** when finished. See [Work order fields](#) for field definitions.

View work order with associated data in maps

Civic Platform allows you to view the related asset, address, and parcel information of some work orders in the maps 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.



Example: A user searches for all work orders for instances where high-pressure cleaning was performed over the past six months. Maps 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 maps

1. From the **Work orders** page, do one of the following:
 - Select the check boxes next to the work order(s) you want to map in Accela GIS.
 - Open the work order and select the **Map** tab.
2. Select **Map**.



Note: Civic Platform displays a map of the relevant area, and displays all assets, addresses, and parcels related to the selected work orders.

Use 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. From the **Work orders** page, find and select the check box next to the work order(s) you want to update.
2. Hover over **Menu** and select **Group update**.
3. Update data as necessary. See [Group update fields](#) for field definitions.
4. Select **Save**.

Print a work order

You may print work order details or a work order list.



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 Adobe Acrobat or Acrobat Reader installed in order to view and print. Civic Platform generates printable permits, licenses, applications, and service requests in PDF.

To print a work order

1. From the **Work order** page, do one of the following:
 - To print the list of work orders, hover over **Menu** and select **Print page**.
 - To print a work order details:
 1. Open the work order to print.
 2. Select either the **Summary** tab or the **Record** tab.
 3. Hover over **Menu** and select **Print page**.



Note: Civic Platform generates a PDF version of either the asset list or the asset details in a new browser window.

2. Use your browser's print options to print the work order.



Note: 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.

Manage 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.

Copy work order data from related work orders

You can copy any data collected on an existing work order to one or move existing work orders, including fee items, workflow status, inspections, application-specific information, workflow task-specific information, parcel information, people information, and conditions.

**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.

For more information on copying work order data using the work order's **Record** tab or from the **Work order** page, see [Clone a work order](#).

To copy data from related work orders

1. From the **Work orders** page, find and open the related work order(s) you want to copy.
2. Select the **Related records** tab.
3. Hover over **Menu** and select **Copy**.

Civic Platform displays the **Copy to record** and **Copy to a set** page.

SubmitResetCancelHelp

Copy To Record:

Copy To A Set:

Record Type - Specific Information

☐ Fee Items [\(Select\)](#)

☐ Workflow Status

☐ Inspection [\(Select\)](#)

☐ Custom Fields [\(Select\)](#)

☐ 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

4. Enter the new work order application number or set to which you want to copy the existing work order information.



Note: To look up the work order ID, select  and enter the required search criteria.

5. Select the work order data elements you want to copy to the existing work orders or set.
6. Select **Submit**.

View and activate 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.

To view and activate a related work order

1. From the **Work orders** page, find the work orders you want to view and activate.
2. Select the **Related records** tab.

Civic Platform displays a work orders genealogy page.



3. Select the work orders that you want to view and activate.

Remove 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. From the **Work orders** page, find and open the work order you want.
2. Select the **Related records** tab.
3. Find and select the check box next to the child work order(s) you want to delete from the parent work order.
4. Select **Delete**.



Before removing a work order relationship, make sure you want to remove the relationship. No warning or confirmation message displays when removing related work orders.

Create, update, add, and remove work order tasks

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.



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 **Work order task** tab. If the administrator enables the feature and enters the tasks, work order tasks are attached to work order templates and specify the exact information to be completed. You can then edit the **Default estimate** and **Default standard operating procedure** fields, as well as update the task's status update the **Comments** field for each task.



Notes:

- Depending on user permissions, users either see asterisks (****) in the cost column or the actual numerical values of the work order cost by tasks.
- To view a list of a work order's tasks, select that work order's **Work order task** tab.

Create 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 you enter include: **Task code**, **Description**, and **Default standard operating procedures**.

To create a work order task

1. From the **Work orders** page, find and open the work order for which you want to create a work order task.
2. Select the **Work order task** tab.
3. Select **New**.
4. Enter the **Task code**, **Description**, **Default standard operating procedures**, and **Default estimate** time. For a complete list of the fields that display, see [Work order task fields](#).
5. Select an **Effective date** and **Expiration date**, and from the list fields.
6. Select **Submit**.

Look up and add 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. From the **Work orders** page, find and open the work order to which you want to add a work order task.
2. Select the **Work order task** tab.
3. Select **Look up**.
4. Complete any of the field search criteria to find the work order tasks. For a complete list of the fields that display, see [Work order task fields](#).
5. After you enter all the desired search criteria, select **Submit**.
6. Select the check box next to the work order task(s) that you want to add to the work order.
7. Select **Select**.

Update 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. From the **Work orders** page, find and open the work order that you want to view.
2. Select the **Work order task** tab.
3. Find and open the work order task to update.
4. Update the desired fields on the work order task. For a complete list of the fields that display, see [Work order task fields](#).



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 set the work order task to complete. When a work order task is marked complete, the task displays in green.

5. Select **Submit**.

Delete 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 remains 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. From the **Work orders** page, find and open the work order that you want to view.
2. Select the **Work order task** tab.
3. Select the check box next to the work order task(s) you want to delete.
4. Select **Delete**.
5. When prompted for confirmation, select **OK**.

Run a work order report

You can run and print work order reports. Your agency may create custom reports that require specific parameters. For example, you may need to identify the work order type, user group, dates, or other information.



Note: Contact your supervisor or system administrator if you have questions about a particular report.

To run a work order report

1. From the **Work orders** page, find and open the desired work order.
2. From the **Summary** tab, select **Reports**, then select the desired report.
3. Enter report parameters as needed.



Note: Parameter information varies by report. If you have questions, contact your supervisor or system administrator.

4. Select **Submit**.
5. Do any of the following:
 - To print the report, select the **Print** icon.
 - To export the report in a different format and/or download it to your device, select the **Export** icon. Make the desired selections, and then select **Export**.

Clone 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. From the **Work orders** page, find and open the work order you want to clone.
- 2. Select the **Record** tab.
- 3. Hover over **Menu** and select **Clone**.
- 4. Complete these fields:

Field	Description
Number of clones per record type	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.
Record type	From the menu, select a record type and move it to the Select the Record Type field.

- 5. Select **Submit**.
- 6. Select the check boxes next to the information you want to clone.
- 7. Select **Submit**.
- 8. Modify the cloned work order as necessary.

Work order assignments and costs

Assignment and cost items help identify where resources are allocated and where the money is spent.

**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](#).

Select a link below for more information:

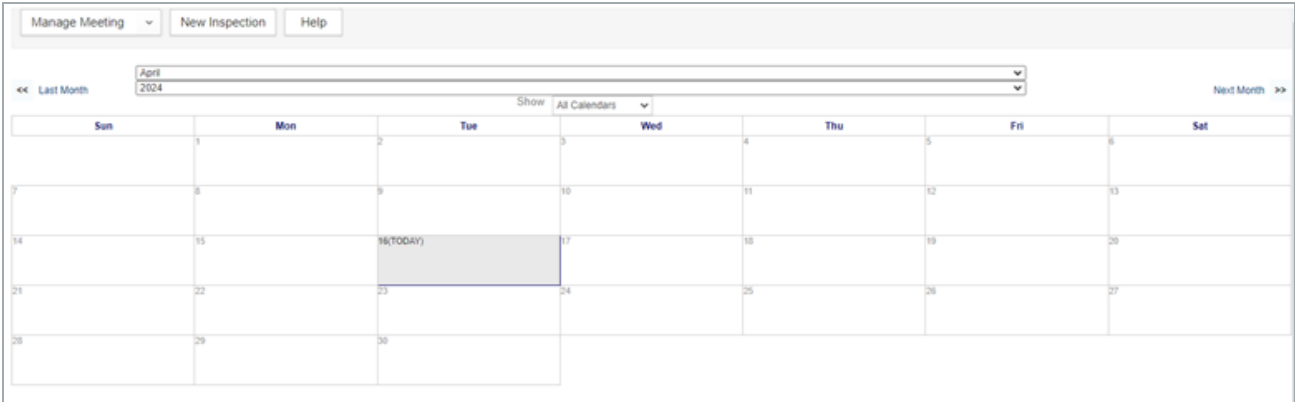
-
-
-
-

View the work order calendar

The work order calendar allows you 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. From the **Work orders** page, find and open the work order you want.
2. Select the **Calendar** tab.



3. Do one of the following:
 - Select a scheduled item to view its details.
 - Select **New Inspection** to schedule an inspection.
 - Select **Manage meeting** to create a new meeting or schedule a meeting.

Associate and update 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** pages. On the **Assets** and **PM schedule** pages, if you select some assets and create a work order, the work order automatically associate with the assets. On the **Work order** page, 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 GIS.

Associate 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 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. From the **Work orders** page, find and open the desired work order.
2. Select the **Assets** tab.
3. To look up an asset and associate it to the work order, do the following:
 1. Select **Look up**.
 2. Enter search criteria.
 3. Select **Submit**.
 4. Select the asset you want to associate to the work order.
 5. Select **Select**.
4. To select an asset from the Accela GIS map viewer and associate it to the work order, do the following:
 1. Select **GIS** and select **Show/Select assets**.
 2. Select an asset on the map.
 3. Open either the Context or Actions menu.
 4. Select **Link object to work order**.

View and edit 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 GIS map viewer to view the assets with their start and end locations.

To view and edit an associated asset

1. From the **Work orders** page, find and open the desired work order.
2. Select the work order ID link to open the work order.
3. Select the **Assets** tab.
4. To edit the details of an associated asset:
 1. Selecting the asset ID link of the asset.
 2. Edit field values as needed.
 3. Select **Save**.
5. To edit the asset fields specific to the work order:
 1. Find the asset in the assets list.
 2. Complete the editable fields next to the Asset ID of the asset.
 3. Select **Save**.
6. To view associated assets in the Accela GIS map viewer:
 1. Select the assets in the assets list.
 2. Select **GIS** and select **Show/Select assets**.
7. To view the work location of associated linear assets in the Accela GIS map viewer:
 1. Select the linear assets in the assets list.
 2. Select **GIS** and select **Show work location**.



Note: Accela 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](#).

3. 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**.

Delete 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. From the **Work orders** page, find and open the desired work order.
2. Select the work order ID link to open the work order.
3. Select the **Assets** tab.
4. Select the asset you want to delete from the work order.
5. Select **Delete**.

Update 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. From the **Work orders** page, find and open the desired work order.
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 **Menu** and select **Group update**.



Note: 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.

5. Complete the required fields and others as needed.
6. Select **Save**.

Link, add, and edit work order parts

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.



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.

Link 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 with Part Inventory. See [Part inventory](#) for more information on creating parts.

To link a part to a work order

1. From the **Work orders** page, find and open the desired work order.
2. Select the **Part** tab.
3. Select **Look up**.
4. Complete the required fields and others as needed. See [Work order parts fields](#) for field definitions.
5. Select **Submit**.
6. Select the part(s) you want to associate with the work order template.
7. Select **Submit**.
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. Select **Submit**.

Add 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 [Add, view, and delete associated parts to an asset](#). For information on working with parts, see [Part inventory](#).

To add standard parts

1. From the **Work orders** page, find and open the desired work order.
2. To verify that a linked asset has parts associated to it, you can view the asset record (for instructions, see [View assets](#)), skip to step 5, or do the following:
 1. Select the **Asset** tab.
 2. Select the name of an asset.
 3. Select the **Associated parts** tab.
3. Select the **Part** tab.
4. Select **Standard parts**.



Note: 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. Select **Select**.

Edit 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 **Part Inventory** page. See [Part inventory](#) for more information.

To edit a work order part

1. From the **Work orders** page, find and open the desired work order.
2. Select the **Part** tab.
3. Select the part that you want to review and edit.
4. Update fields as needed. See [Parts \(and Related\) Details](#) for field definitions.
5. Select **Submit**.

Delete 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. From the **Work orders** page, find and open the desired work order.
2. Select the **Part** tab.
3. Select the part(s) that you want to dissociate.
4. Select **Void**.

Track work order production

Civic Platform provides a way for agencies to track work order production, which allows them to have 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 with other work orders. Agencies can use this information to budget, plan, and problem solve.



Note: Work order tracking must be enabled by your system administrator. Contact your system administrator with any questions.

Enter data for work order production tracking

To track work order production, data must be entered in the fields used for tracking.

To enter data for work order production tracking

1. Open the **Work orders** page.
2. Select **New** for a new work order.
3. Complete the required fields and others as needed. See [Work order details](#) for a complete list of fields.



Notes:

- If the default value for **Est. prod. units** is incorrect, enter the appropriate value.
- When closing the work order for each day's activity, update production information in the **Actual prod. units** field.

4. Select **Submit**.



Civic Platform automatically validates the **Actual prod. units** and **Est. prod. units** fields and then saves the record in production history.

Recalculate work order production

If an agency changes default or estimated standard values for a work order type, existing work orders can be recalculated to reflect the change. Recalculation helps maintain consistency when comparing work orders.



Changes to the default or estimated standard values must be made by a system administrator.

To recalculate work order production

1. From the **Work orders** page, select the check box(es) next to the work order(s) you want to recalculate.
2. Select **Menu > Recalculate**.



Civic Platform executes the calculations and creates a new record for production history.

View work order production history

Civic Platform provides the ability to maintain a history of work order production. This history shows recalculations and may assist in anticipating the inflation rate. It may also assist in comparing production crew efficiency at different times of the year.

To view a work order production history

1. From the **Work orders** page, open the desired work order.
2. Select the **Production history** tab.

Work order details

The following tables list and define the default fields available in the different interfaces you encounter when working with work orders.



Important: Because your Civic Platform installation has been configured to meet your agency's specific requirements, some fields, functionality, and processes may differ from those described. Contact your agency administrator or help desk with questions.



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.

Field	Description
Actual Prod. Units	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.
Alt ID	An alternate ID used to identify the application.
Assigned Date	The date when work order assignment to a department or individual occurred.
Assigned To Department	The department that is responsible for the work order. Click the Selection icon to choose a department. If you are responsible, click the Current User link to enter your user name in the field. The associated department field then updates to reflect the correct department for the current user.
Assigned to Staff	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 Current User 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.
Brief Description	A brief description that helps you to identify the work order.
Channel Reported	The communication method used to submit a work order. For example, mail, email, a public internet site, or a phone call.
City	The city associated with the work order.
Closed By	The person who closed the request.
Closed Date	The date when the work order closes. Click the calendar icon located next to the From and To fields to specify a date range. Civic Platform supplies these dates in the corresponding fields.
Closed Department	The department responsible for closing the work order. Click the Selection icon to choose a department.
Closed Staff	The individual within a department responsible for closing the work order.

Field	Description
	Use the drop-down list to choose an individual. If you are responsible, click Current User to enter your user name into the field. When you click Current User, the associated department field updates to show your department.
Contact Email	The email address of the primary contact associated with the work order.
Contact First Name	The first name of the primary contact associated with the work order.
Contact Last Name	The last name of the primary contact associated with the work order.
Contact Middle Name	The middle name of the primary contact associated with the work order.
Contact Relationship	The primary contact's relationship to this work order. For example, choose "citizen."
Contact Type	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.
Cost Per Unit	Read-only field that displays the cost per unit.
Detailed Description	A detailed work description of the work order.
Direction	The street direction designation of the primary address associated with the work order.
Email	The email address of the primary contact associated with the work order.
Est. Cost Per Unit	Read-only field that displays the estimated cost per production unit, which is defined at the Application Type level by the system administrator.
Est. Job Cost	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.
Est. Prod. Units	The default value for estimated production units.
First Name	The first name of the primary contact associated with the work order.
House # Alpha (end)	The ending street number that makes up the address. You can enter alphanumeric characters in this field.
House # Alpha (start)	The beginning street number that makes up the address. You can enter alphanumeric characters in this field.
Last Name	The last name of the primary contact associated with the work order.
Level # (end)	The ending level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multistory building/sub-complex.
Level # (start)	The beginning level number (floor number) that makes up the address within a complex, used to identify a floor or level of a multistory building/sub-complex.
Level Prefix	The prefix for the level numbers (floor numbers) that make up the address.

Field	Description
Middle Name	The middle name of the primary contact associated with the work order.
New Status	Use the drop-down list to choose the status for the Work Order. See also the description of the Status field.
Opened Date	The creation date of the work order record.
Opened Department	The department responsible for creating the work order. Click the Selection icon to choose a department.
Opened Staff	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 Current User to enter your user name into the field.
Organization Name	The name of the organization to which the primary contact associated with the work order belongs.
Owner Name	The primary owner associated with the work order.
Parcel Number	The primary parcel associated with the work order.
Parts & Costing	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.
PM Schedule ID	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.
Priority	The priority level assigned to the work order. Use the drop-down list to choose the priority level.
Relationship	The primary contact's relationship to this work order.
Reported Date	The date of the application report.
Reported Time	The time of the application report.
Schedule Date	The scheduled date for the work order.
Schedule Time	The scheduled time for the work order.
Severity	The severity of the work order. Your agency creates the severity levels.
State	The state associated with the work order. If you are searching for a work order, use the drop-down list to choose a state.
Status	The current status of the work order. If you are updating work order details, you can change this status. 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.
Status Group	If you are searching for a work order, you can specify what status group the work order status belongs to.
Street #	The street number of the primary address associated with the work order (for example,

Field	Description
	the 150 in 150 N. Main Street).
Street Direction	The street direction of the primary address associated with the work order (for example, the N in 150 N. Main Street).
Street Name	The street name of the primary address associated with the work order.
Street # (Start/End)	The street number(s) of the address associated with the work order. 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.
Street Suffix	The street suffix designation of the primary address associated with the work order.
Street Type	The street type designation of the primary address associated with the work order.
Sub Type	A more specific classification for the work order. Select the desired sub type from the drop-down.
Total Job Cost	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.
Undistributed Costs	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.
Unit Type	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.
Work Order Description	A brief description of the work order.
Work Order ID	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.
Work Order Name	Enter the name of the work order.
Work Order Task	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.
Work Order Type	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.
ZIP Code	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.

Field	Description
Action By	The person responsible for following up on the work orders.
Action By Department	The department responsible for following up on the work orders.
Actual Prod. Units	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.
Assigned Date	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.
Assigned to Department	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. When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.
Assigned to Staff	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. When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.
Closed by Department	The department responsible for closing the work orders.
Closed by Staff	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. When you click the Current User link, the associated department field is updated to reflect the correct department for the current user.
Closed Date	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.
Comments	Comments about the work orders in this field.
Completed by Department	The department responsible for completing the work orders.
Completed	The individual within a department responsible for completing the work orders.

Field	Description
by Staff	
Completed Date	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.
Detailed Description	A description of the work required.
Est. Prod. Units	This read-only field displays the estimated cost per production unit, which is defined by the system administrator.
New Status	The status for the group of work orders.
Opened Date	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.
Priority	The priority level assigned to the work orders.
Reported Date	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.
Reported Time	The time the work orders were reported.
Status Date	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.

Field	Description
Cost Account	The appropriate cost account where the units should be added or subtracted from when associating with a work order.
Cost ID	The identification number populates automatically when you click the Submit button.
Cost Item	The name for the cost item.
Cost Type	The appropriate cost type, such as: contract, employee, materials.
Current Asset Usage	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. When you fill value in this field and save, Civic Platform adds a usage record for the asset in the Assets portlet.
Date	The date
Description	The description for the cost item.

Field	Description
End Time	The end time of the assignment or cost item usage. Mark “All Day Event” if applicable.
Fixed Rate	The fixed cost rate to be used for the cost item.
Quantity	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 work order, the Quantity section only allows you to specify one quantity for the cost item. 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.
Record Status	This read-only field indicates whether the cost item record is active or inactive in the administrator portlet.
Start Time	The end time of the assignment or cost item usage. Mark “All Day Event” if applicable.
Time Accounting Group	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.
Time Accounting Type	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.
Time Elapsed	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. 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.
Total Cost	Automatically calculated according to the formula below. If there are no cost factors for the cost items: $\text{Total Cost} = \text{Fixed Rate} + \text{Quantity} * \text{Unit Rate} * \text{Default Cost Factor}$ If there are multiple cost factors for the cost items: $\text{Total Cost} = \text{Fixed Rate} + \text{Unit Rate} * (\text{Cost Factor \#1} * \text{Quantity \#1} + \text{Cost Factor \#2} * \text{Quantity \#2} + \dots + \text{Cost Factor \#n} * \text{Quantity \#n})$
Type	The type from assignment or cost.
Unit Rate	The unit cost rate to be used for the cost item.
Unit of Measure	The unit of measure for the cost item.
Updated	This read-only field shows when the cost item is last updated in the administrator portlet.

Field	Description
Date	
Updated By	This read-only field shows the user account that last updated the cost item in the administrator portlet.
Usage/Time Tracking	This field contains three parts: Time Accounting Group, Time Accounting, and Time Elapsed.
Work Order Task	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 Task Suffix 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.

Field	Description
Actual	The actual amount of time needed to complete the task, as opposed to the estimated amount of time.
Comments	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.
Complete By	The worker who completed the task.
Complete Date	The date the task is completed.
Cost	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.
Default Estimate	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.
Description	Description associated with the work order task.
Duration Unit	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.
Effective Date	The date the task was first active in the software. Administrators can create tasks ahead of time to prepare for use in Civic Platform. The Effective Date must occur before the Expire Date.

Field	Description
Allow Estimate Change	The option of whether to allow changes to be made to the estimate.
Expire Date	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.
Order	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.
Record Status	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.
Standard Operating Procedures	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 Create, update, add, and remove work order tasks .
Task Code	The identification code number for a work order task.
Task Suffix	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.
Updated By	The user who last updated the work order task.
Updated Date	The most current date the work order task record is updated.
Workflow Task	The workflow task that you want to associate with the work order task.
Workflow Task Status	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.

Field	Description
Comments	Comments associated with the asset.
Current Value	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.
Date of Service	The date the asset was initially placed into service.

Field	Description
Depr. Amt	This read-only field shows the decline in the asset value by the asset depreciation calculation.
Depr. End Date	The end date for the asset depreciation calculation.
Depr. Start Date	The start date for the asset depreciation calculation.
Depr. Value	This read-only field displays the asset value after the asset depreciation calculation.
Description	A description of the asset.
End Location	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.
ID	The identification number used to identify the asset.
Last Update	This read-only field indicates when the asset was last updated.
Name	The name of the asset.
Salvage Value	The residual value of the asset at the end of its useful life.
Short Notes	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.
Size	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.
Start Location	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.
Start Value	The beginning value or purchase price of the asset.
Status	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.
Status Date	The date the asset status changed.
Type	The type of asset.  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.

Field	Description
Unit	The unit of measure for the value entered in the Size field. Your system administrator determines which units are available in this menu.
Useful Life	The number of years the asset is expected to be used.

Work order cost distribution

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.



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 (that is, 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, (that is, 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.

Distribute costs for a work order

You can distribute costs from multiple access points within the **Work order** page, including the **Summary**, **Assignments and costs**, **Part**, and **Record** tabs. If there are multiple assets associated with a work order, you have multiple options for cost distribution.

To distribute costs

1. From the **Work Order** page, find and open the work order with which you want to work.
2. Do one of the following:

From either the **Summary** or **Record** tabs, hover over **Menu** and select **Distribute costs**.

or

From either the **Assignments and costs** or **Part** tabs, select the **Distribute costs** button.
3. Select **Costing** and/or **Parts**, depending on how you want to select items for costing.
4. Select one or more items for distribution.

 **Notes:**

- To select all the items in the list, mark the check box in the header row above the check box column.
- As you select items, the **Total amount to be distributed** at the top of the page is updated to reflect your selections.

5. Select **Next**.
6. Select the assets to which you want to distribute costs and select **Next**.
7. Select the distribution method you want to use:
 - **By number of assets:**
 1. Select **By Number of Assets** and select **Next**.
 - **By asset size**
 1. Select **By Asset Size** and select **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.

- **By asset type**
 1. Select **By Asset Type**.

Civic Platform displays a list of **Asset types**.
 2. Complete these fields:

Field	Description
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.

Field	Description
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. Select **Next**.
- **By manual allocation**
 - 1. Select **By manual allocation**.

 **Note:** 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. (The **Cost** fields may be to the far-right of the dialog.)

 **Note:** The total cost you allocate to all assets must equal the cost allocation for distribution

- 3. Select **Next**.

 **Note:** The **Distribution summary** page summarizes the cost distribution based on your selections.

 **Note:** Before you distribute, you can modify the distribution details by selecting the **Edit** link next to the item you want to modify.

- 8. Select **Distribute**.

Review or roll back work order cost distribution history

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.

Review work order cost distribution history

Review a list of distributed work order costs in the **Distribution history** tab if you want to confirm the work order cost assigned to individual assets.

To review work order cost distribution history

- 1. From the **Work Order** page, find and open the work order for which you want to review costs.
- 2. Select the **Distribution history** tab.

Roll back work order cost distribution

When you roll back costs, you remove all the costs assigned to assets in a transaction.



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. From the **Work Order** page, find and open the work order for which you want to roll back costs.
2. Select the **Distribution history** tab.
3. Select the transaction numbers with which you want to work.



Note: Civic Platform automatically selects all transactions with the same transaction number.

4. Select **Undo**.

You are prompted to confirm whether you want to roll back all the costs.

5. Select **OK**.



Note: Civic Platform rolls back all the costs for the selected transaction.

Workflow

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.

Attach 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 [Attach files](#) for more information.

Delete and reassign 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. Find and open the record with the workflow you want to replace.
2. In the record details, select the **Workflow** tab.
3. Hover over the **Menu** button and select **Delete & assign workflow**.
4. Select **Yes** or **No** in the **Delete workflow history** field. **Yes** keeps a read-only version of the old workflow history when you replace the workflow. **No** keeps the individual workflow history items.



Note: If you choose **No**, you can delete individual workflow history items as needed later. See [Delete and reassign a workflow](#) for more information.

5. Select a new workflow from the **New workflow** list
6. Enter a comment, if required or desired.



Note: You may be required to enter a comment explaining the reason for deleting and reassigning the workflow before you can submit the change.

7. Select **Submit**.

Review and delete 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.



Example: Workflow history may show that an inspection, building review, or service request was rejected on a certain date and is now pending.

Review workflow history

You can review a history of a workflow.

To review workflow history

1. Find and open the record with the workflow history you want to review.
2. Select the **Workflow history** tab.
3. Select the link to the task you want to review.



Note: Depending on your agency's settings, the task details may be read-only.

Delete 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. Find and open the record with the workflow history you want to review.
2. Select the **Workflow history** tab.
3. Select each task you want to delete.
4. Select **Delete**.
5. Enter a comment explaining the reason for the deletion if required.

Override 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.



Warning: This function should be used with extreme caution. If done incorrectly, the normal workflow could be disrupted. Contact your agency administrator for more information.

To override a workflow process

1. Find and open the record to override a workflow process.
2. Select the **Workflow** tab.
3. Select **Supervisor**.



Note: The button is available only if you have supervisory privileges.

4. Select the check box next to the workflow task from the list.
5. Modify the task details as needed. See [Workflow task fields](#) and [Ad hoc task fields](#) for field definitions.
6. Select **Submit**.

Workflow tasks

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 allows you to manage your tasks both from the **Workflow** tab for a record and from the **My tasks** page.

Assign and reassigning workflow tasks

Workflow tasks can be assigned and reassigned from the **My tasks** page.

To assign or reassign workflow tasks

- 1. From the **My tasks** page, select the **Workflow tasks** tab.
- 2. Locate the workflow task(s) you want to assign.

 **Note:** You can select **Search** and complete the search criteria to find the workflow tasks(s).

- 3. Select the check box next to the workflow task(s) you want to assign/reassign.
- 4. Select **Assign**.
- 5. Complete the following fields:

Field	Action
Department	Choose the department you want to assign the task to. Select the Current Department link to choose your department.
Workflow Calendar	Choose a workflow calendar.
Staff	Choose the individual you want to assign the workflow task to. Available options are dependent on your Department selection. Select the Current User link to choose yourself.
Due Date	Use the picker to select the due date for the task.

- 6. Select **Submit**.

Claim a task for yourself

To claim a task for yourself

- 1. From the **My tasks** page, select the **Workflow tasks** tab.
- 2. Locate and select the check box next to the workflow task(s) you want to claim.
- 3. Select **Claim**.

 **Note:** Civic Platform assigns the indicated assignment changes to your queue.

Release a task from your queue

To release a task from your queue

1. From the **My tasks** page, select the **Workflow tasks** tab.
2. Locate and select the check box next to the workflow task(s) you want to release.
3. Select **Release**.



Note: Civic Platform moves the task from your queue into the unassigned queue.

Activate tasks

You can activate or deactivate tasks, as well as change optional tasks to required tasks.



Note: This feature is only available if your agency administrator activates the feature.

To activate tasks

1. Find and open the record to activate or deactivate a task.
2. Select the **Workflow** tab.
3. Select the **Task activation**.
4. Select the check box next to the task.
5. Select **Active** and/or **Required** as needed for the parallel tasks you want to activate/set to required.



Note: To set all parallel tasks to active and/or required, select **Active** and/or **Required** in the **Parallel tasks** header.

6. Select **Submit**.

Access workflow tasks

You can access tasks and sub-tasks from the **Workflow** tab of any record. You can also access these tasks from the **My tasks** page.

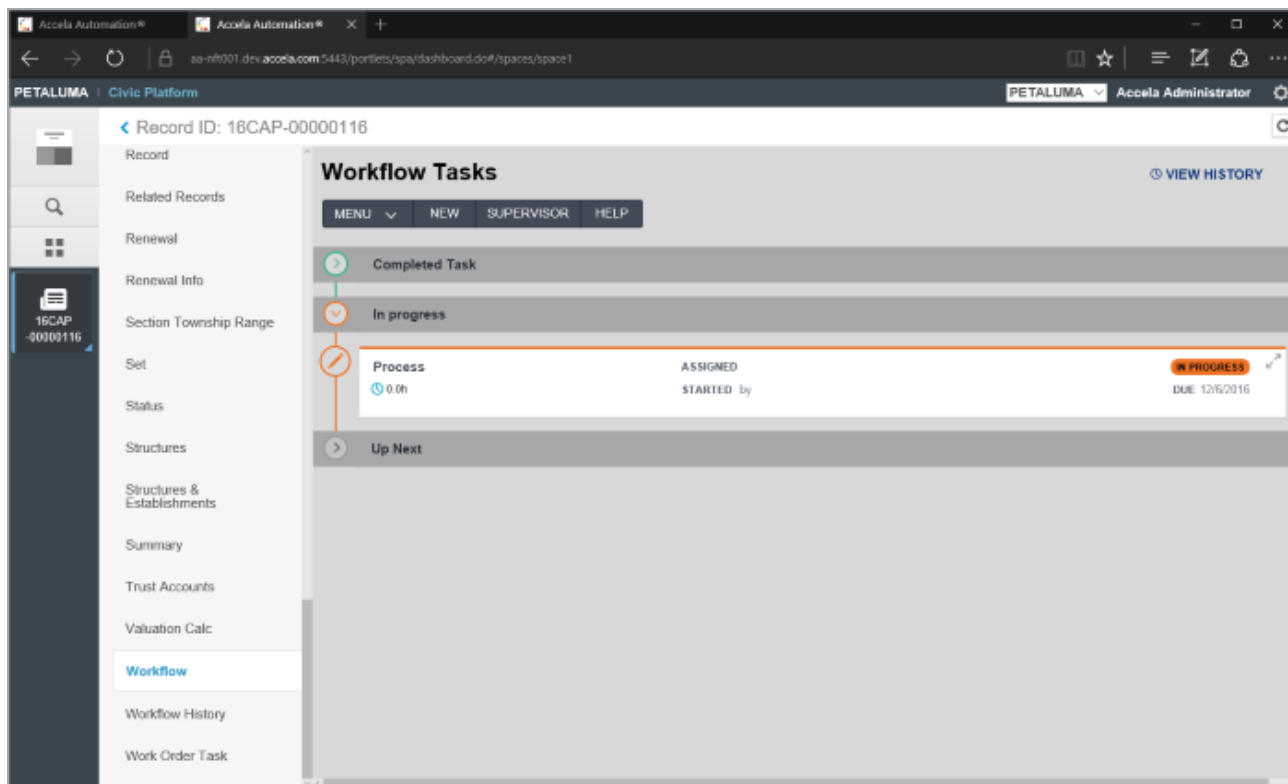
Access tasks via the workflow tab

When you review tasks on the **Workflow** tab of a record, you see 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. Find and open a record.
2. Select the **Workflow** tab.

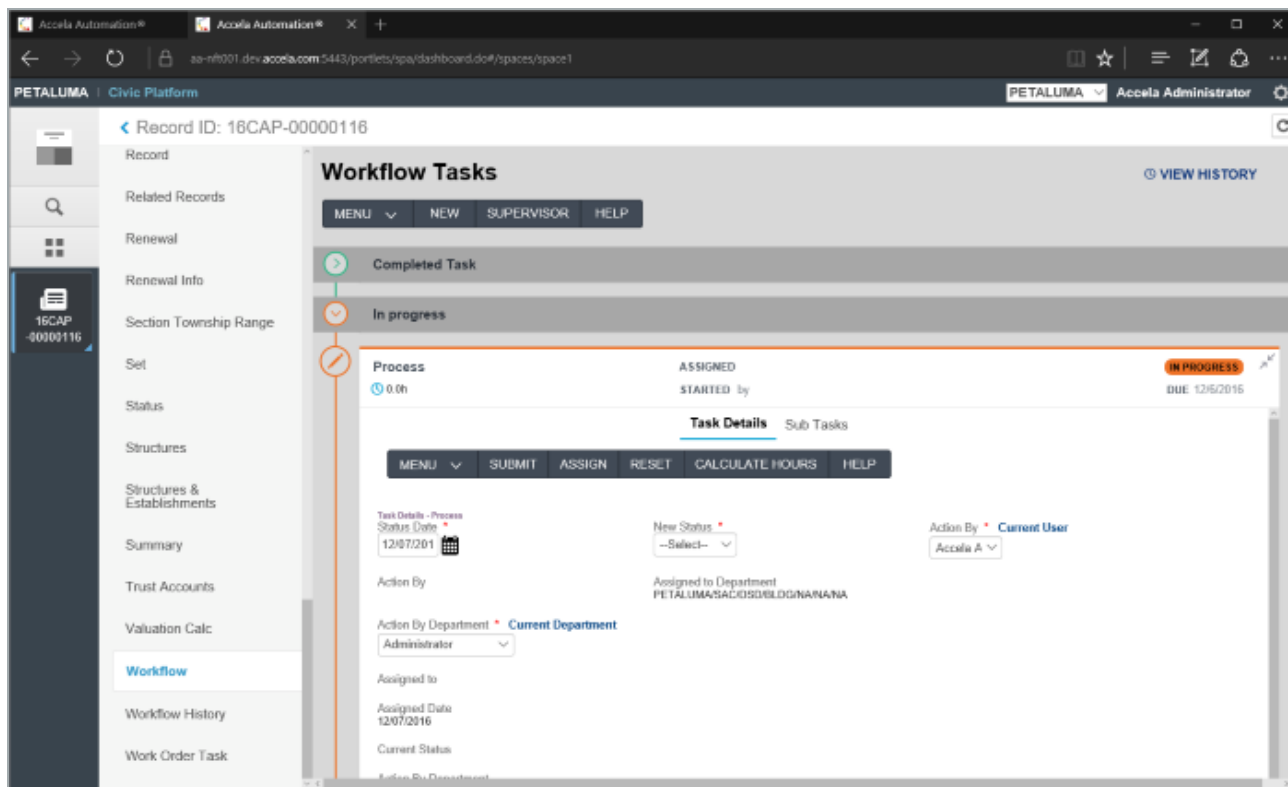
The **Workflow tasks** summary card view allows you to track the progress of an application throughout the workflow process. You can easily access information for each step in the process and quickly see which steps are complete and incomplete, required and optional.



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. You can expand/collapse task sets and then expand the individual tasks that are most pertinent to your jobs.

3. To view task details, select an active task or the pencil icon next to the workflow task. You can only view active task details.

The **Tasks details** card view allows you to see or edit the detailed step information that is pertinent to a specific workflow task so you can track, update and move an application forward.



Note: From the **Workflow** tab, you can add ad hoc workflow tasks by selecting **New** on the **Workflow tasks** main menu. You can also select New ad hoc task in the **Additional ad hoc task** section. Ad hoc tasks are displayed in the collapsible sections under the **Additional ad hoc task** section with **Completed** and **In progress** tasks grouped together so they can be quickly collapsed or expanded.

Access 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 selecting the collapsed **Sub-tasks** tab on the **Task details** page.

Documents attached to a workflow task via the **Electronic document review** functionality are listed in a **Sub tasks** tab on the **Task details** page. Reviewers can interact with the document review sub-tasks from the Workflow, from the **Documents** tab, or from their **My tasks** pages.

To access the document review sub-tasks a workflow task

1. Find and open the record to review.
2. Select the **Workflow** tab.
3. Expand the task you want to view.

4. Select the **Sub tasks** tab to view any documents assigned for review to the current workflow task.
5. You can interact with the document review task details via the **Action** menu. See [Electronic document review \(EDR\)](#) for information about interacting with documents that need review.

Create ad hoc tasks

Ad hoc tasks are useful when you need to keep a record of unplanned or immediate tasks that affect the record.



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 page.

Create 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. Find and open the record to which you want to add an ad hoc task.
2. Select the **Workflow** tab.
3. Select **New**.
4. Complete the form with available data. See [Ad hoc task fields](#) for a description of fields.
5. Select **Submit**.