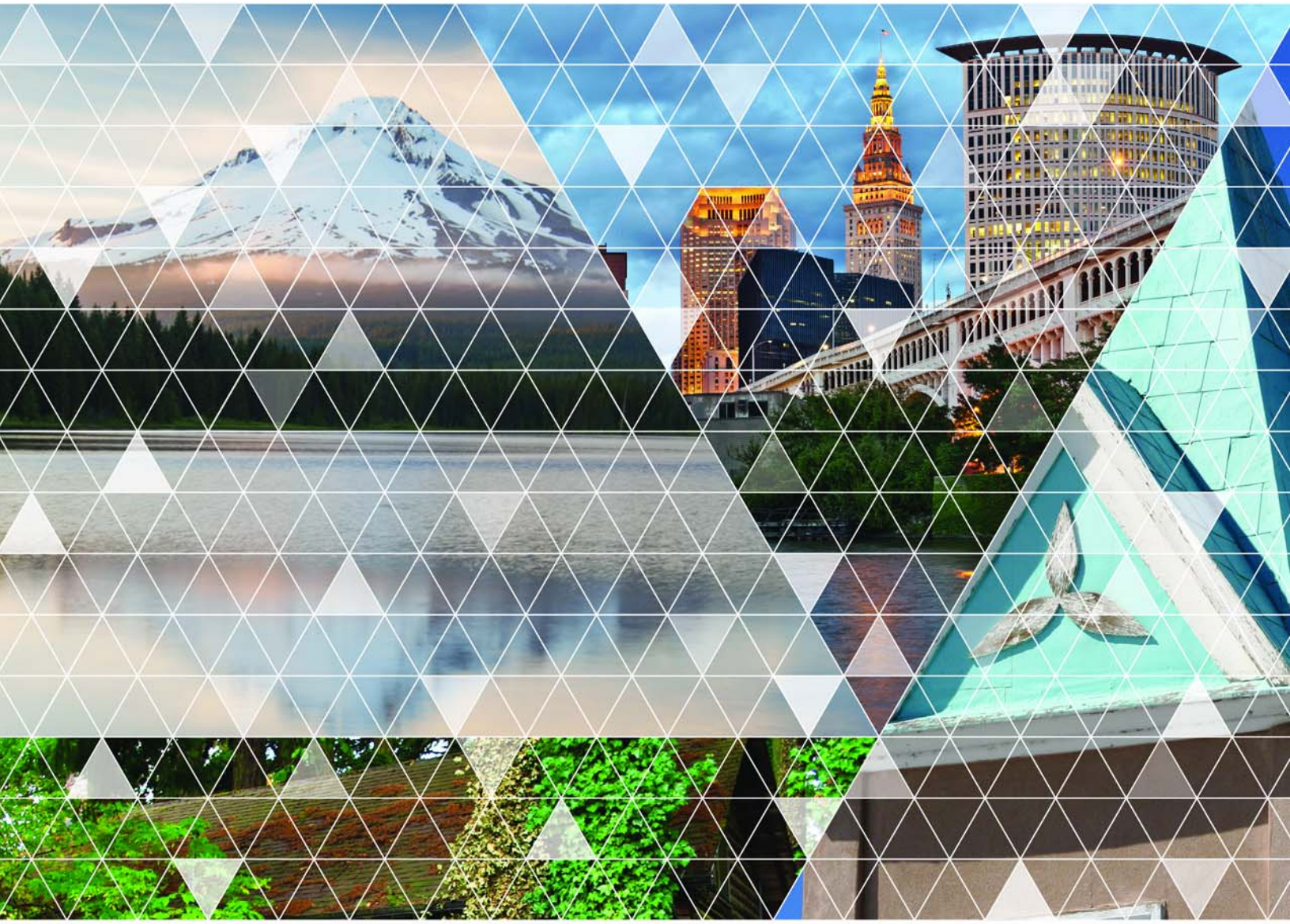
Version 8.0

Accela Civic Platform®

Concepts Guide



Accela

Accela Civic Platform Concepts Guide

Version 8.0
October 2015

Corporate Headquarters

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

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

www.accela.com

Contents

Introduction

Civic Platform provides a web-based interface for government agency users to automate their business processes, share information across departments, and communicate with office staff, field staff, the public, external businesses, and other key stakeholders.

Related Links

Solutions

Add-on Products

Licensing Models

Best Practice Templates

Solutions

Accela provides agency solutions for the following four areas:

- **Land Management**. The Land Management solution automates, tracks, and manages land use activities. These activities include permit request processing, plan reviews, inspections, investigations, fee calculations and collections, signoffs, permit issuance, and so forth. The Land Management solution enables agency staff to access data entered by public users, verify activities, check permit status, and obtain complete parcel information from a centralized database.
- **Licensing and Case Management**. The Licensing and Case Management solution automates the business process for license applications, registration, and renewals. The solution tracks the fees, exams, continuing education, and approvals associated with each license type.
- **Asset Management**. The Asset Management solution tracks and manages assets, work orders, and agency resources. The solution automates asset costing, inventory, maintenance, investigations, and inspections. The solution manages all agency assets, including fleet, street, water, wastewater, parks and recreation, plant and facilities, sewer, railway, roadway, and so forth.
- **Service Request**. The Service Request solution automates and manages interdepartmental or citizen requests for service, complaints, or inquiries. The solution organizes and manages requests, to improve citizen interaction.

Each solution provides one or more modules that agencies use to define business processes performed by different entities within the agency. Civic Platform stores data from these business processes in a central database, which Civic Platform can access across multiple user groups, departments, or agency organizations that use different solution modules.

You configure a solution module by creating custom record types for that module (Applications and Records) and associating specific processes and other record artifacts with that record type.

Add-on Products

Civic Platform provides the following, separately licensed, add-on products that integrate with Civic Platform:

- Citizen Access
- GIS
- Mobile Office
- IVR
- Accela Mobile Apps

Citizen Access

Citizen Access provides a web based and mobile phone based interface that works with Civic Platform applications and databases to provide citizens with online access to government services and information. With Citizen Access, citizens can apply and pay for permits, schedule inspections, and look up information.

Accela GIS

GIS (Geographic Information System) leverages geospatial data to streamline agency processes and is compatible with Windows and Web-based applications. GIS provides a geographic view of all land-use, zoning, and infrastructure information associated with agency records, such as parcels, permits, inspections, plans, assets, work orders, and service requests.

Agency users can manage records within GIS and efficiently complete research tasks. Agency users can identify records within their agency's jurisdiction and determine the staff responsible for specific jobs. For example, an inspector can use GIS to search for assigned inspections within a community or neighborhood. The inspector can also use GIS to create an inspection route sheet and obtain driving directions.

You can access GIS maps from Civic Platform, Mobile Office, and Citizen Access.

Mobile Office

Mobile Office works with Civic Platform to provide field access for activities such as inspections, investigations, disaster response, code enforcement, work orders, and service requests. Civic Platform updates records in the Civic Platform database based on user inputs from the Mobile Office device. Mobile Office runs on Windows operating systems and mobile devices such as PDAs, tablet PCs, and laptops.

IVR

IVR is a voice response system that provides a way to execute business processes defined in Civic Platform. IVR includes recognition of voice and keypad inputs from a touch tone telephone. IVR responds with voice prompts and message prompts. IVR uses text-to-speech, custom text-to-speech, or custom audio files.

With IVR, agency administrators use the IVR administration site to set up and manage the IVR system, and to define who can perform permitting tasks over the telephone. These tasks include checking the status of permits and associated inspections, scheduling inspections, and updating the status of an inspection. Also, agency administrators can use the site to easily change call flow settings, and decide to use audio files instead of text to speech.

Accela Mobile Apps

Accela is releasing a series of new apps that run on smartphones. The first of these apps is the Inspector app, which enables inspectors to conduct Civic Platform inspection activities in the field, through their smartphone.

Licensing Models

Civic Platform supports three agency licensing models; 1) Accela-hosted, 2) on-premise, and 3) subscription. In the Accela-hosted model, Accela provides the host environment and the agency setup. In the on-premise model, agencies provide the host environment and the setup. The Accela-hosted and on-premise models typically involve variable levels of Accela professional services to assist with the agency configuration.

The subscription model targets small to mid-size agencies that can implement Accela Best Practice Templates (BPT) with minimal additional setup. The subscription model includes 80 hours of Accela professional services to complete the agency setup.

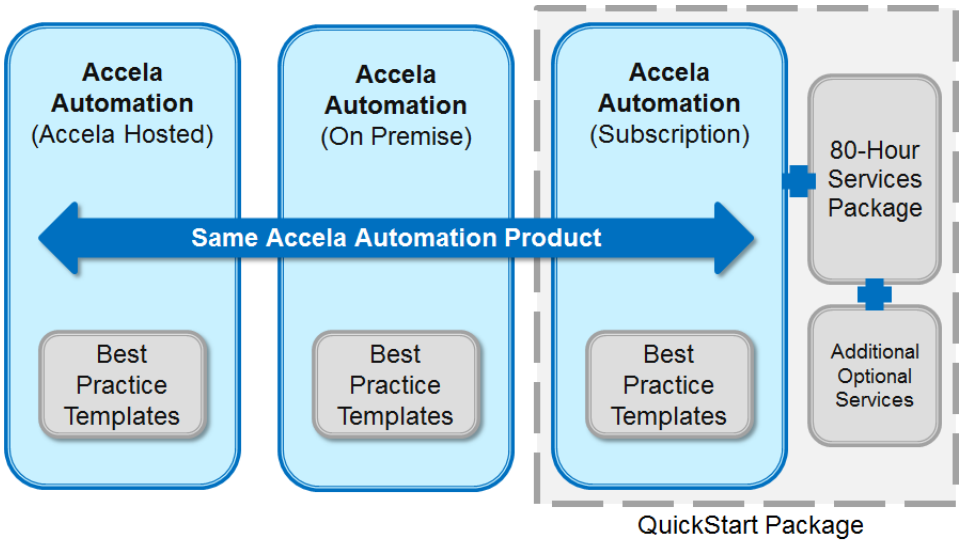


Figure 1: Agency Usage Models

Best Practice Templates

The Accela Best Practice Templates (BPTs) provides out-of-the-box configurations for Land Management, Licensing and Case Management, Asset Management, and Service Request solutions. BPT provides specific record types, workflows, application specific information, standard comments, and so forth, that represent best practices for each of the solution-based modules (building, enforcement, permitting, and so forth).

For small to mid-size agencies, BPT provides fully functional best practice solutions that require minimum additional agency-specific setup. For large agencies, BPT provides the basis for more extensive additional setup and configuration.

Agencies

Civic Platform provides different types of agencies and ways to share information across agencies.

Related Links

Understanding Super Agencies and Agencies

Sharing Information and Services Across Agencies

Understanding Super Agencies and Agencies

A single deployment of Civic Platform supports one super agency and multiple agencies. The Civic Platform installation creates the super agency and creates the user account with super agency privileges. The super agency user creates additional agencies as required to satisfy business requirements.

Each agency can be setup to be completely independent or share information with other agencies. All agencies and the super agency share a common database provided through the Civic Platform deployment.

At the super agency level, you create and setup agencies with agency level functionality, which includes:

- Agency metadata (name, jurisdiction, address, and so forth)
- Enabling audit logs
- Enabling solution modules
- Other miscellaneous setup information

See *Civic Platform On-Premise Supplement* for detailed information that applies at the agency level.

Accela licenses one solution module at the super agency level (agency name = SuperAgency, module name = SuperAgency) and licenses several solution modules (Solutions) at the agency level.

At the super agency level, you define super agency-specific user groups and specify user group capability according to 34 function IDs (FIDs). You also specify the solution modules to which each agency has access. At the agency level, you define module-specific user groups, for each module to which the agency has access, and specify user group capability according to 590 FIDs.

For both the super agency and agency levels, individual users can belong to only one group per module. At the agency level, an individual user can belong to multiple groups across different modules.

In general, you setup agencies to define and isolate organizational entities that follow a specific set of processes on specific object types (processing building permits, for example).

Sharing Information and Services Across Agencies

You can create delegate (super agency) users to manage or view tasks between agencies and you can provide services from multiple agencies to public users.

Multiple agencies can use three methods to share information.

- Delegate users can search agency information and edit agency information without toggling between agencies. The delegate user from the super agency can access agency information such as addresses, parcels, owners, structures, and establishments.
- Delegate users toggle between agencies to access information in other agencies. The delegate user views information and creates records in the agency, like a normal agency user.
- Normal agency users search information and edit information (such as addresses, parcels, owners, structures, and establishments) in another agency without toggling between agencies.

> **Note:**
> Civic Platform and Citizen Access users can access information and services across agencies without knowing that the data comes from other agencies.

You define delegate users at the agency level. Agency administrators control delegate user access the same way as regular users, through user account permissions and the FID configuration for the group or groups to which the delegate user belongs.

Example Use Case

A super agency (state) wants to establish themselves as a hub for agency (county or city) information so that citizens can view and perform tasks associated with processes performed at different agencies. For example, a business owner logs in to Citizen Access to track all city, county, and state services associated with a recent building permit application. Services can include maintenance of waterlines or structural upgrades.

Accessing Across Agency Services by the Public

Civic Platform provides the ability to manage services, offered by multiple agencies, for public users. A public user can request services for records offered, from multiple agency locations, through one Citizen Access login.

Example Use Case

A public user requests a water pipe repair with Maricopa County (agency one) and a sewer repair with Portland (agency two) after logging into Citizen Access. The one login provides access to all services for which they have permission.

Incorporating the Service Lock Condition

You can use the service lock condition feature to limit one or more services to a particular licensed professional or address. You can use this feature to lock out services, provided by one agency, and allow services from other agencies.

Using Citizen Access for Creating Records

Citizen Access provides record creation across agencies and management across agencies. With Citizen Access, public users can manage records, created across multiple agencies, from a single Citizen Access account.

> **Note:**
> Best practice is to deploy a single Citizen Access site to service multiple agencies.

Example Use Case

A state hosts a single Citizen Access site that provides access to all agencies (cities and counties) within the state.

User Interface

Civic Platform provides a common interface for users across an agency, yet also allows each user to personalize the interface to a certain extent. Your pages may display differently from other users, or from the examples in this guide. Additionally, the data and functions accessible to one user may not be available to another user. The pages that display depend on the Civic Platform configuration.

The basic Civic Platform interface consists of a console and main links. Each main link may include multiple portlets.

Portlets expose specific tasks and specific information in an encapsulated section of the page. Agency administrators can customize portlets and main links to group information and group tasks.

Related Links

Understanding the Civic Platform Console

Understanding Civic Platform Portlets

Understanding the Form Portlet Designer

Understanding the Form Layout Editor

Understanding General Interface Settings

Configuring Go To Menus

Understanding Agency Branding

Accessing the Interface

Understanding the Civic Platform Console

The Civic Platform console provides the main Civic Platform interface and includes the agency bar, toolbar, toolbars, main links, portlets, and detailed portlets components (Civic Platform Console).

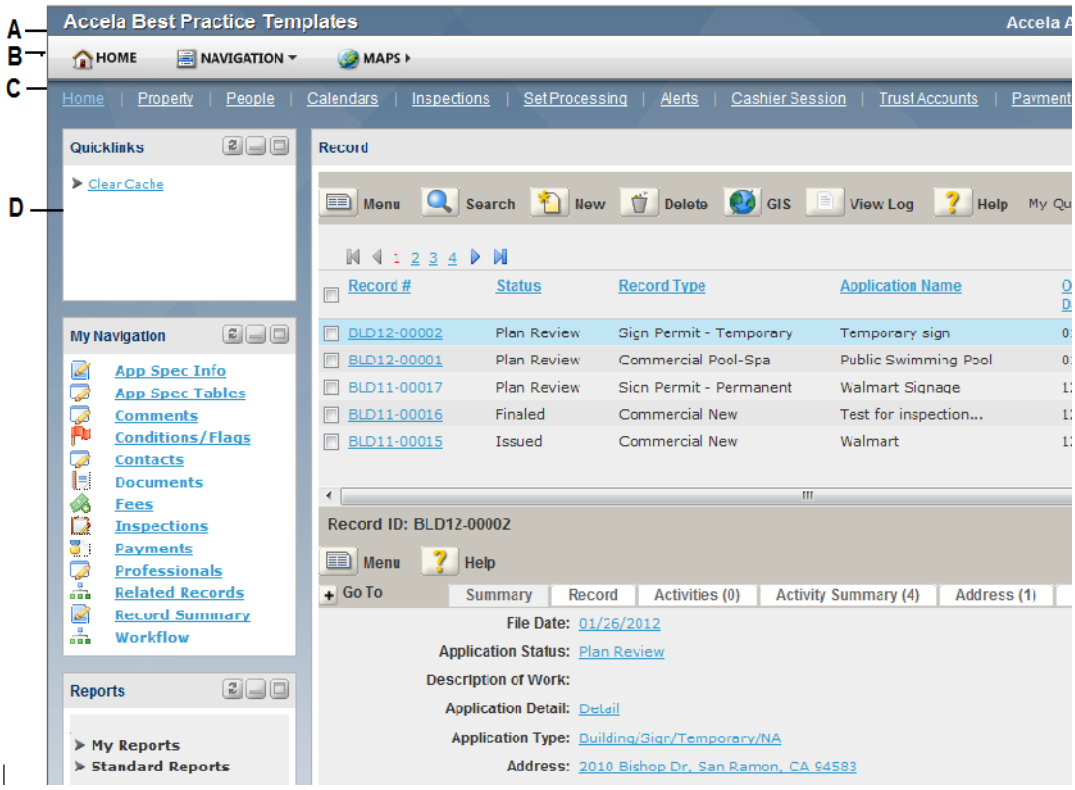


Figure 2: Civic Platform Console

A The Agency Bar (A) displays the agency name and user name, a link to sign out, and a link for configuring the console layout (Configuring the Console).

B The Toolbar (B) (Using the Toolbar) displays frequently used functions.

C The Main Links (C) section provides links to portlets. You specify the links and associated portlets when you configure the console (Configuring the Console).

D You configure the console (Configuring the Console) to display function-specific portlets (D) for performing Civic Platform tasks.

Topics

- Using the Toolbar
- Configuring the Console

Using the Toolbar

The toolbar (Civic Platform Toolbar) provides the following common functions:

Figure 3: Civic Platform Toolbar

- **Home**. Returns to the users home page.
- **Navigation**. Displays a drop-down list of recently worked on items.
- **Create New**. Displays a drop-down menu of available objects, such as a record or portlet, to create instances of.

- **Maps**. Launches the Accela Geographic Information System (GIS). You must configure Civic Platform to expose GIS functionality.
- **Search**. Provides a global search function for any Civic Platform object (record ID, asset ID, contact name, address, parcel number, and so forth).
- **Help**. Launches the online help system.

Configuring the Console

You configure the console through the Console Options link (Civic Platform Console). You configure the console by specifying the links to display in the main links area (Adding Pages (Links) To Main Links Section), the portlets to launch when a user clicks those links (Specifying Portlets, Layout, and Skin), the layout of the portlets (one or two columns), and the appearance (skin) for the page.

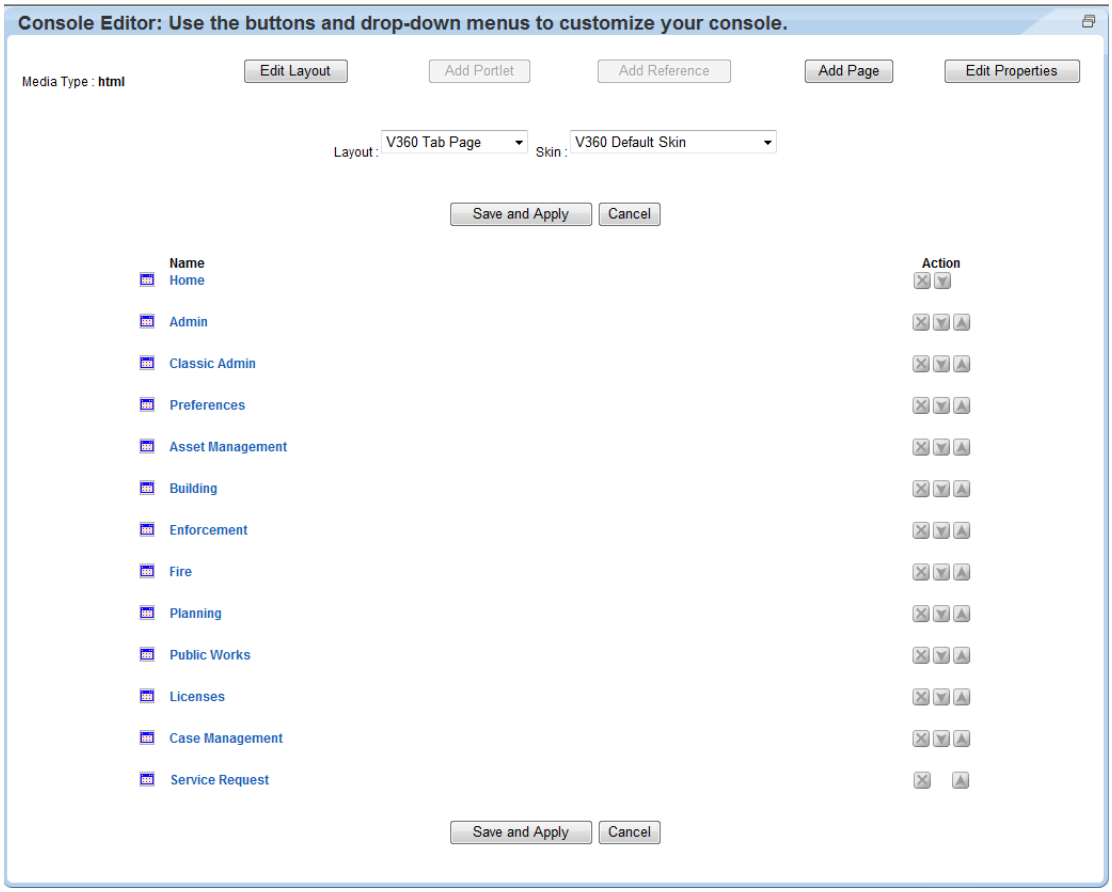


Figure 4: Adding Pages (Links) To Main Links Section

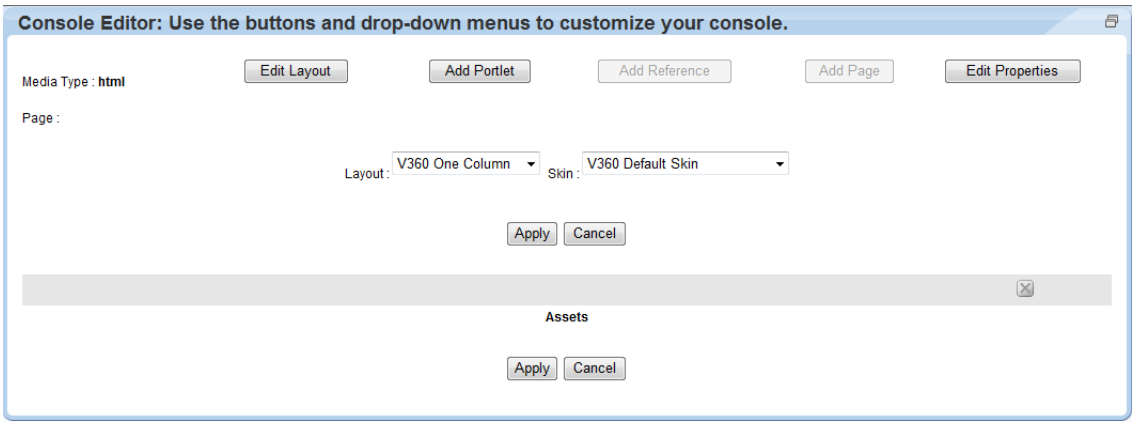


Figure 5: Specifying Portlets, Layout, and Skin

You can define a different default console for each solution module (Asset Management, Building, Licenses, and so forth).

Understanding Civic Platform Portlets

You use Civic Platform portlets to perform administrative tasks, work on form data, and process records. Civic Platform provides over one hundred default portlets for your use (Page One of OOTB Portlets). Most of these portlets directly relate to Civic Platform processes or record types; a couple portlets involve Citizen Access and several portlets involve RSS feeds to external data sources (RSS Feed Portlets); two portlets, Accela Custom Portlet and Accela Custom Report, allow you to add custom portlets and custom report portlets to the console.

Common Civic Platform portlets include: Assets, Work Orders, Building Permits, Service Requests, SmartCharts, Alerts, Bulletin Board, and FAQ portlets.

Many of the Civic Platform portlets encapsulate two or more other portlets, where each portlet performs a set of independent functions. Complex List Portlet shows a portlet that encapsulates three other portlets, each with its own **Menu** button. Simple List Portlet shows a portlet that encapsulates two other portlets.

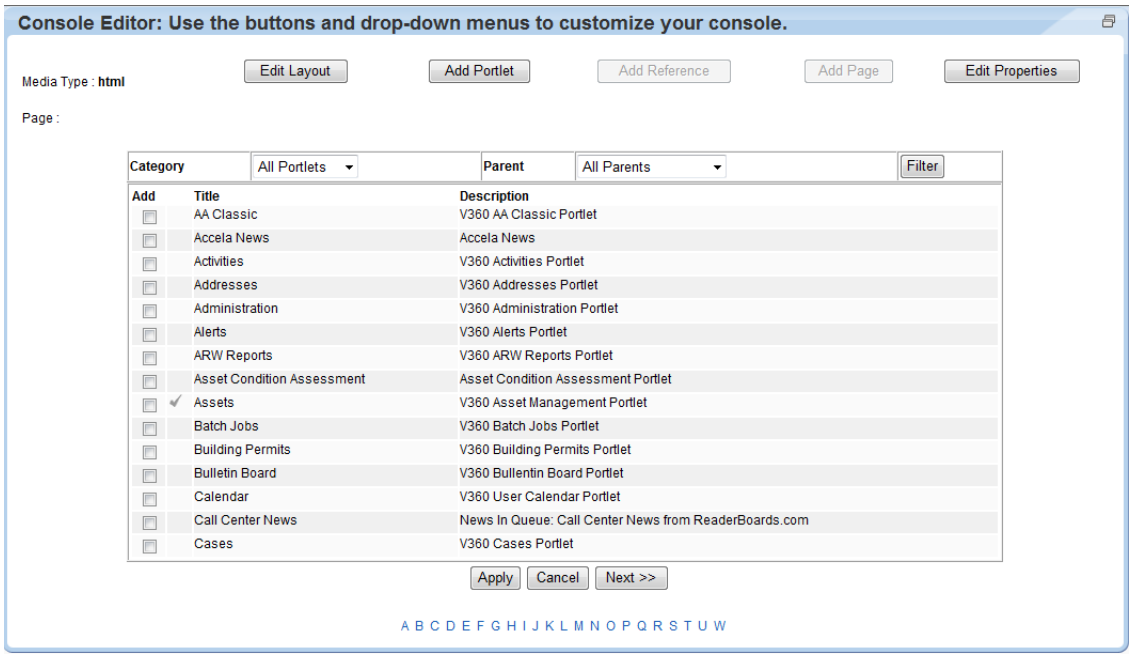


Figure 6: Page One of Provided Portlets

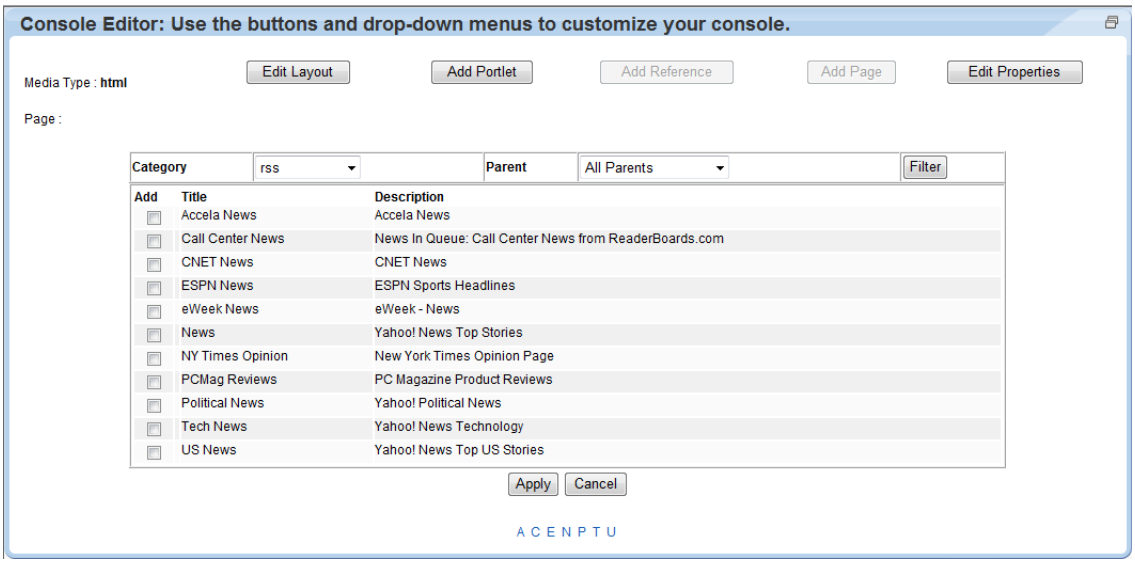


Figure 7: RSS Feed Portlets

Topics

- Understanding Portlet Types
- Custom Portlets
- Setup Portlet
- Preference Portlet

Understanding Portlet Types

Topics

- List Portlets
- Form Portlets
- Link Portlets

List Portlets

A list portlet displays a list of records entered into Civic Platform. A list portlet can include work orders, assets, permits, applications, service requests, addresses, contacts, or any other record type you want to track or process through Civic Platform.

The top section of a list portlet (Typical List Portlet) provides the list the records. Each record displays as a row. Record summary data displays in columns. Buttons at the top provide portlet level functions.

Civic Platform displays editable detailed form data, for the highlighted record, in the bottom section of the portlet. You can view different categories of detailed record data by clicking on the tabs.

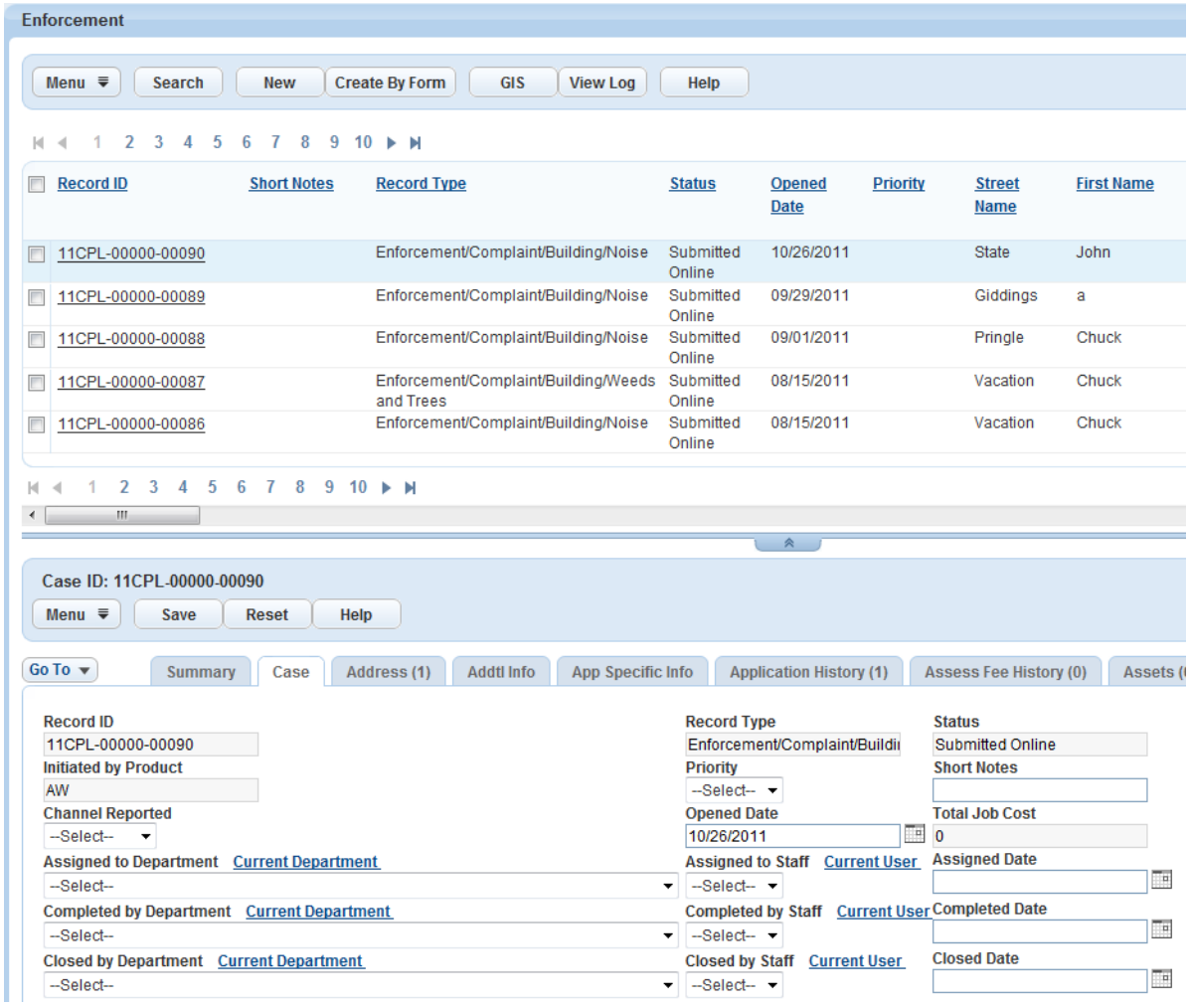


Figure 8: Typical List Portlet

Go To Menu

The record details portlet, shown in the bottom half of Typical List Portlet, provides many different tabs, depending on the record type. To quickly navigate to specific tabs of interest, you can use the Go To

button to link to the tabs most frequently used (Go To Menu). You can configure the list of links in the Go To menu, either by module or by user group (Configuring Go To Menus).

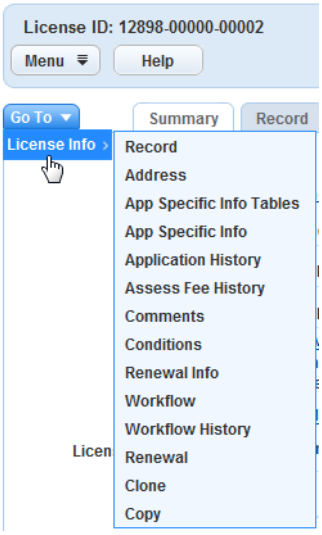


Figure 9: Go To Menu

Civic Platform uses simple and complex list portlets. A simple list portlet (Simple List Portlet) lists all the records in the portlet, like the one shown in Typical List Portlet

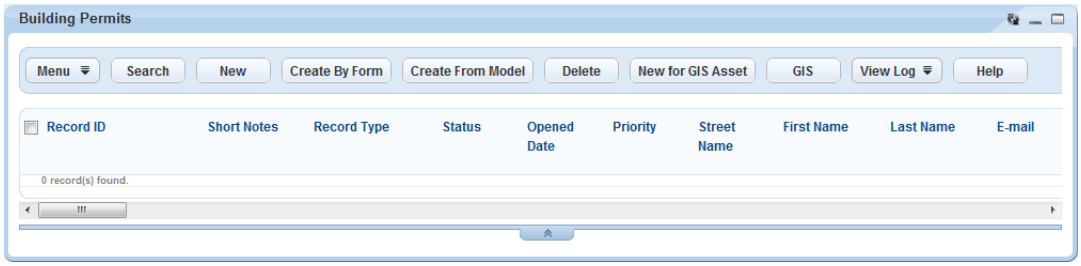


Figure 10: Simple List Portlet

A complex list portlet, like the one shown in Complex List Portlet, provides categorization schemes for record types shown in the portlet. You can use these categorization schemes to navigate to the record of interest. The right section of a complex portlet behaves like a simple list portlet.

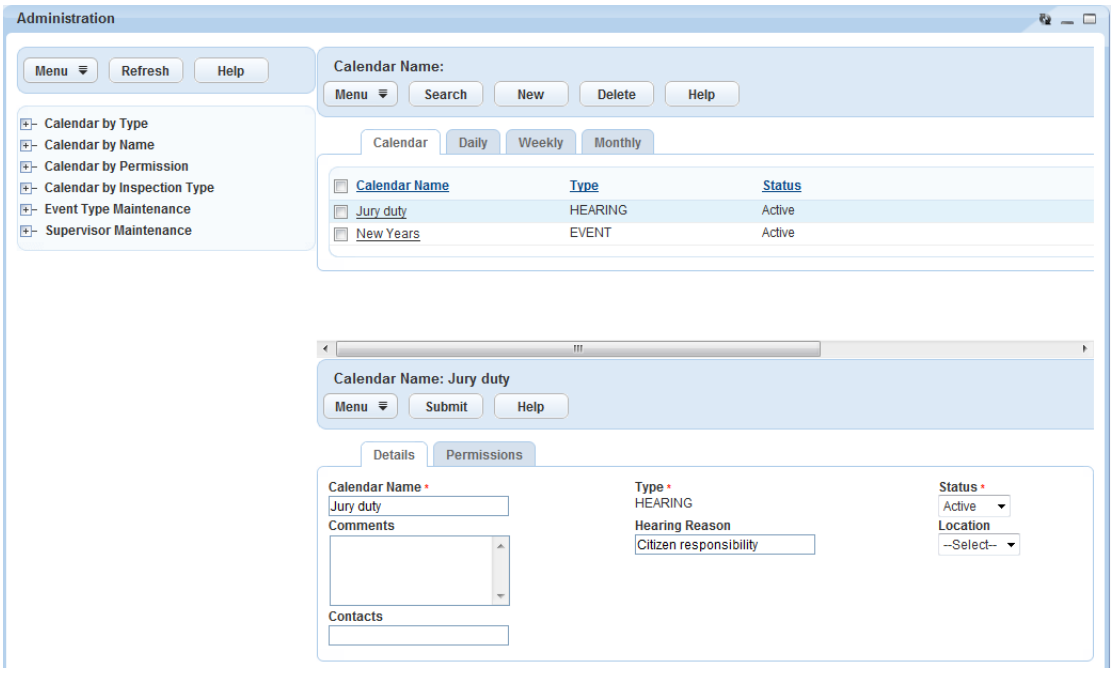


Figure 11: Complex List Portlet

Common List Portlet Functions

List portlets provide unique functions, designed for use with particular record types and processes, and a set of functions common across all list portlets. The following lists common functions for all list portlets:

- Menu. Provides an additional drop-down list to select Customize Content, CSV Export, Expand List, Edit View, or Print Page. Many list portlets include additional options in the drop-down list.
    - Customize Content. Used to define how you want a portlet list to display. You can select the fields to display, change field width, add field labels, and change field display order. You can specify the fields to display in an expanded and contracted list.

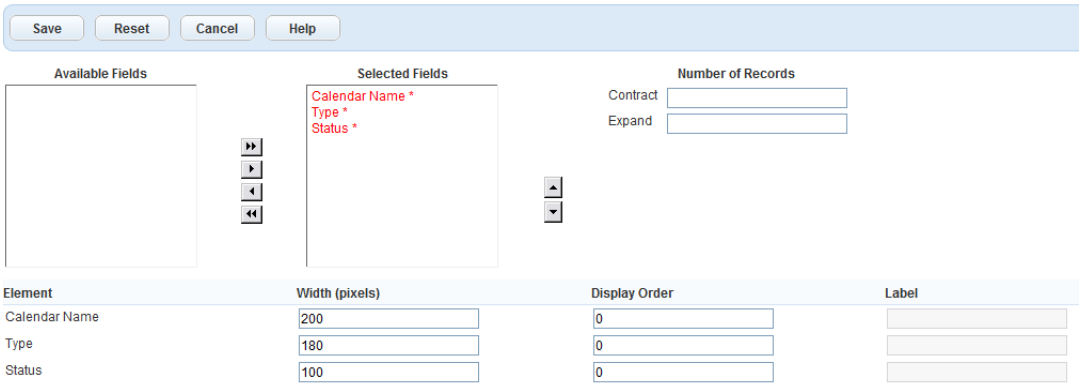


Figure 12: Customize Content Display

- CSV Export. Used to export information displayed in a list portlet to a CSV (Comma Separated Value) file. You can view this file in other programs such as Microsoft Excel.
- Expand/Contract List. Used to increase or decrease the number of records displayed by choosing Expand List or Contract List.

  - Edit View. Opens the form portlet designer to create and name a custom list portlet display that filters out records matching specified criteria ().
  - Print Page. Prints the currently displayed page.
- Search. Used to search for records matching search criteria.
- Refresh. Refreshes the display.
- New. Used to create new records for tracking in the list portlet.
- Delete. Deletes the selected item in the list portlet.
- Help. Launches context-sensitive online help.

Form Portlets

Civic Platform uses form portlets to display forms for collecting details about a single object such as a permit, application, service request, or address. Some fields contain information that you can modified. Fields may require the entry of numeric values, text values, or date values. A field may require you to choose an option, or pre-defined value from a drop-down list. Top Section of ASI Form shows part of a form that users complete when creating new records.

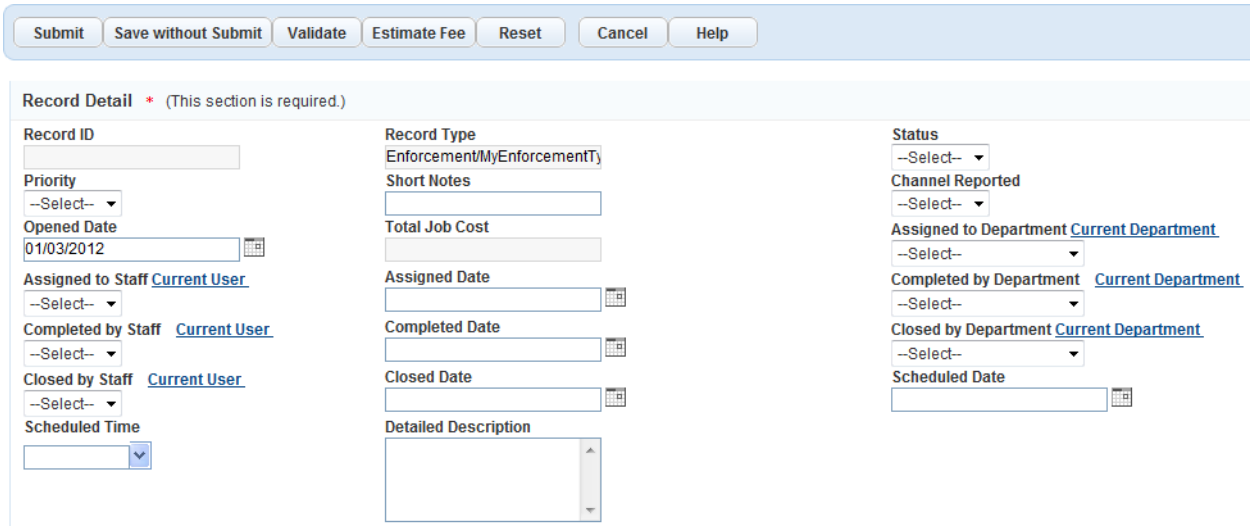


Figure 13: Top Section of ASI Form

Link Portlets

You can create additional portlets containing links to URLs or to other portlets in Civic Platform. You can add FAQ (Frequently Asked Questions) and Quick Links types of portlets to your users' Home tabs.

The Quick Links portlet allows users to quickly access commonly performed tasks, for example, portlets to create, edit, or assign items. You can add links to a company Intranet, search engines, and other web pages. You can add up to five Quick Links portlets.

Custom Portlets

The Accela Custom Portlet can be a custom portlet you want to expose in the Civic Platform user interface. Custom portlets use standard Accela APIs, such as GovXML, to communicate with Civic Platform (see *Accela Automation Custom Portlets Development and Deployment Guide)*.

Accela Custom Report Portlet

In the Civic Platform console configuration (Civic Platform Console), you can select and associate the Accela Custom Report with one of the pages (link). The Accela Custom Report can be a report that you want to open directly from the page link, instead of from the Accela Report list portlet (Reports Portlet 1/2/3/4/5).

Accela Custom Report Configuration shows the Title and Report Name fields you need to specify for the custom report. The title displays as the portlet name, and the report name options are all the reports you configure in the Report Manager.

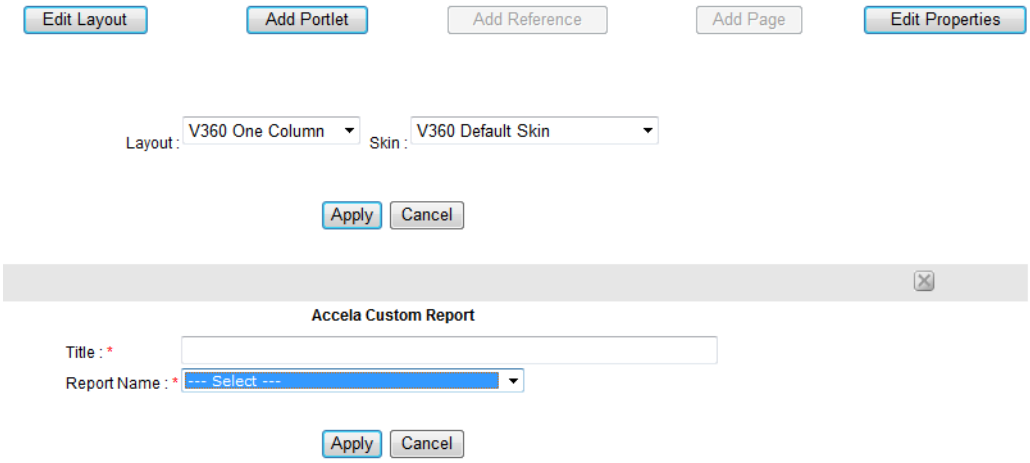


Figure 14: Accela Custom Report Configuration

Setup Portlet

The Setup portlet (Setup Administration Portlet) provides a menu with expanded options and drop-down selections that link to specific administration portlets.

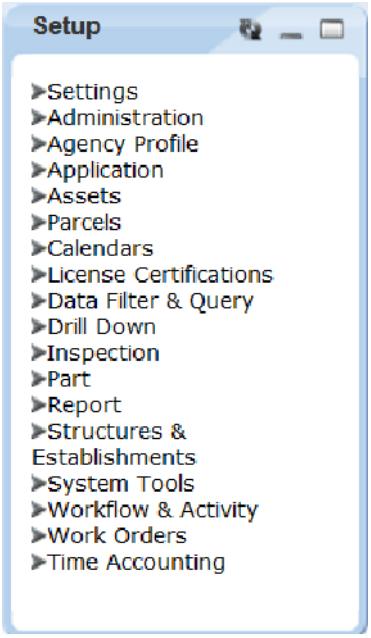


Figure 15: Setup Administration Portlet

Preference Portlet

If you configured different consoles for different modules, the Preference portlet (Preference Portlet) enables you to select the console you want to use.

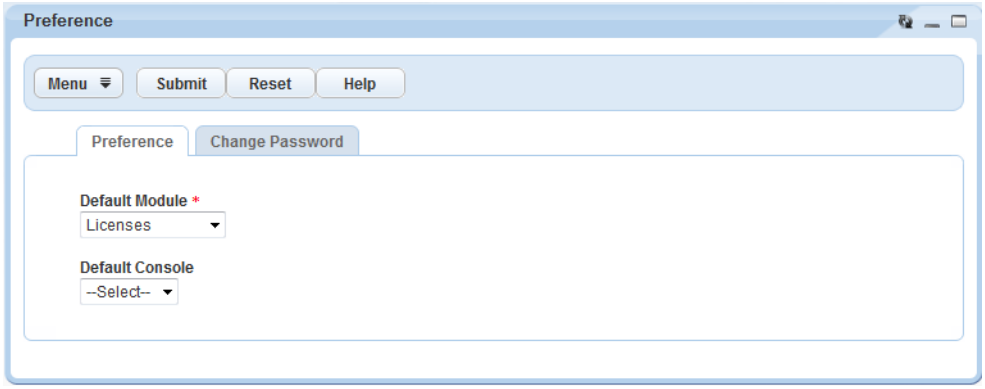


Figure 16: Preference Portlet

Understanding the Form Portlet Designer

Agency administrators can configure form portlets and list portlets for their agency. You can design list portlets and form portlets by agency, module, user group, or individual user (Form Portlet Designer, Portal Applicability).

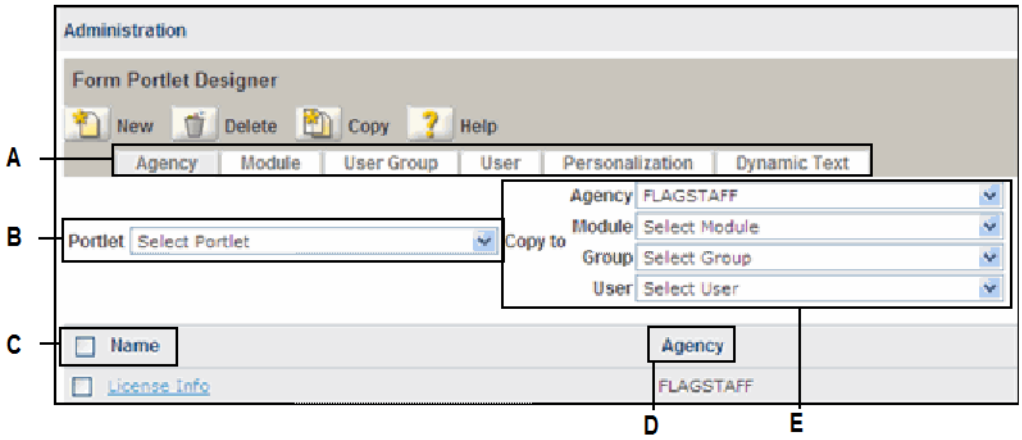


Figure 17: Form Portlet Designer, Portal Applicability

A Tabs identify the level at which you want to customize a of portal. **Agency** specifies all portals in the agency. **Module** specifies portals defined at the solution module; Building, Enforcement, or Licenses for example. **User Group** specifies portals defined for a particular user group; building, cashier, permit processor, permit supervisor, inspector, or clerical. **User** specifies portals defined for an individual user within a user group. **Personalization** specifies the view, for individuals who have the permission to change their individual screen views. **Dynamic Text** allows users to switch the display language text.

B **Portlet** and **Copy to** drop-down lists specify the portlet and level at which to apply portlet design changes. The **Agency** tab can only apply settings at the Portlet (or view name/form name) level. The **Module** tab can apply settings at the Agency and Portlet level. The **User Group** tab can apply settings at the Agency, Module, and Portlet levels.

C The links under the **Name** column list the portlets that satisfy the filter criteria specified in section **B**. You click these links to open up a specific portal for editing in the form portlet designer (Form Portlet Designer, Portal Layout).

D The **Agency**, **Module**, **Group**, or **User** column identifies the level of the custom view in the **Name** column. For example, when you use the module tab, this column becomes the module column and identifies the module affected by the custom view.

E The drop-down lists in the Copy To section specify the level to which to copy the portlet design.

You can use form portlet designer to hide fields, display fields, or make fields read-only. You can set a field's order, placement, and dimensions. You can use the form portlet designer to create a summary portlet that displays a summary of and hyperlinks to designated areas associated with the record.

Example Use Case

A billing department needs the billing contact information and a plan check technician needs parcel zoning information. You can customize a list portal or form portal to only display information according to individual needs or group needs.

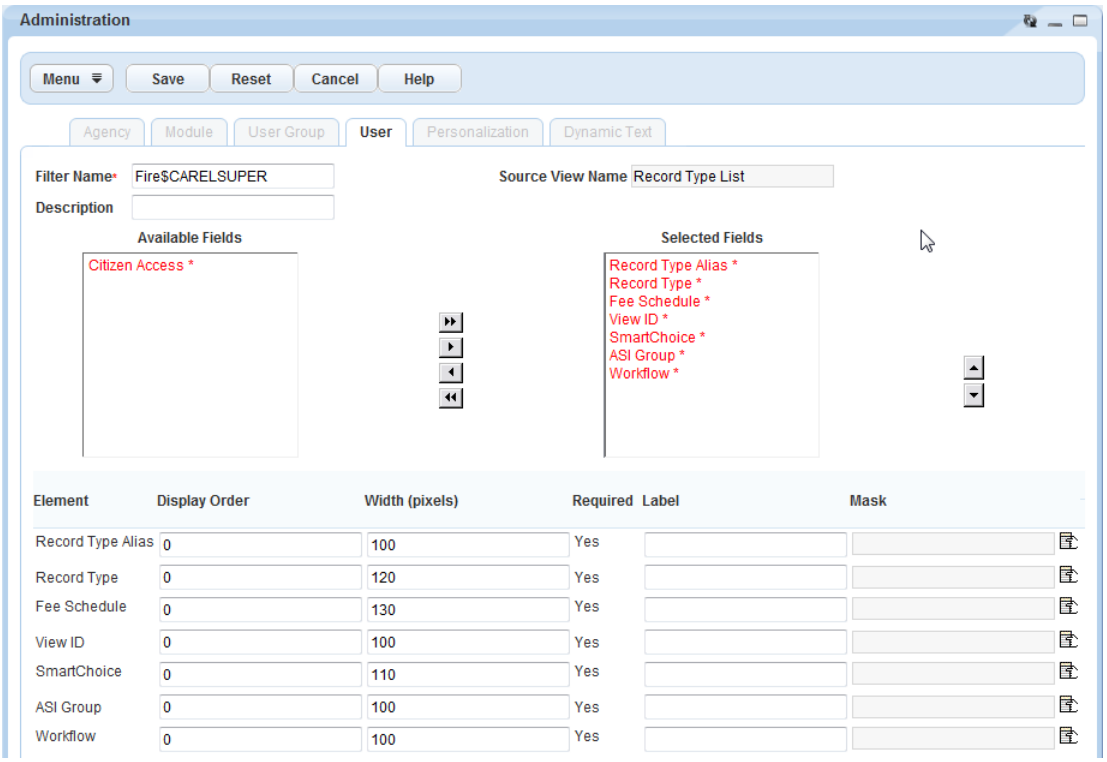


Figure 18: Form Portlet Designer, Portal Layout

Understanding the Form Layout Editor

Civic Platform provides the following form layout editors:

- APO Form Layout Editor
- ASI Form Layout Editor
- Assets Form Layout Editor
- TSI Form Layout Editor

The layout editors provide the ability to create and design forms. The four layout editors use the same tool set (Form Layout Editor).

Topics

- ASI Drill-Downs

Example Use Case

You can use the ASI form layout editor to add fields for collecting unique information. For example, a building permit for residential and commercial construction provides standard sections to collect general information such as address, contact, and current zoning. For new building permit applications you can include signature fields to obtain initials from the board of adjustment for conditional use.

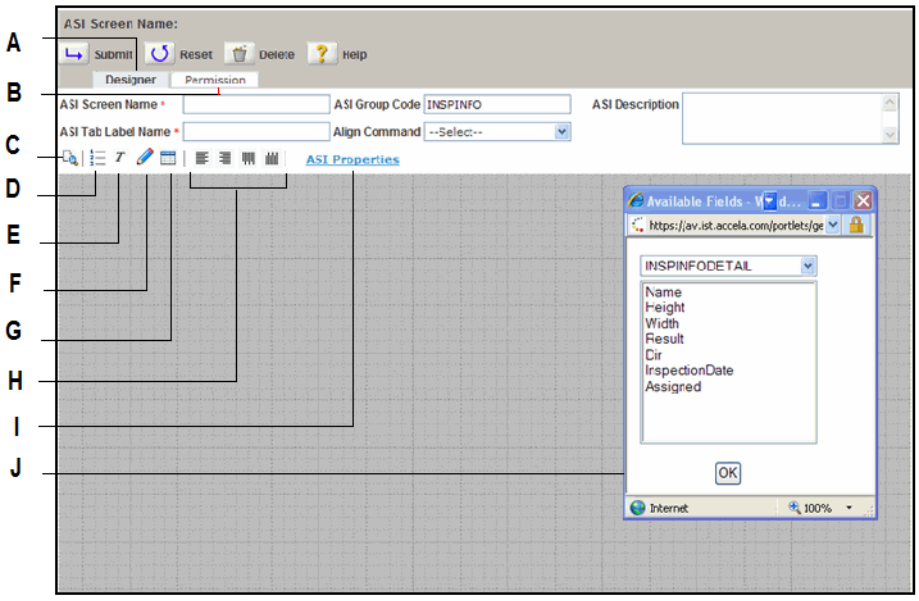


Figure 19: Form Layout Editor

A	Designer tab. Area of product to create and design the form.
B	Permission tab. Area of product to assign permissions and availability of form to users.
C	Preview button. Click to preview the look of the screen.
D	Available Fields button. Click to access the available fields you can add to this page. Double-click the name of the field to add it to the form.
E	Add Label button. Click to add text to the page.
F	Add Line button. Click to add a line to the page.
G	Add ASI Table or Attribute button. This button is only available for ASI and Asset forms. Click the button to add the table associated with an ASI Group Code or an Asset Template ID to the form.
H	Alignment buttons. Click to align the left, right, top, or bottom fields.
I	Properties link. This link takes you to respective configuration area in Civic Platform. The available fields relate to the attribute template for the APO Type, the ASI subgroups, or the Workflow subgroups. If you need to add a field to available fields list, you must first add it to the respective area: the attribute template, ASI subgroups, or Workflow subgroups.
J	Available Fields window. This window displays all available fields for the APO Type, ASI Group Code, Asset Template ID, and TSI Group Code. Double-click the field name to add it to the form.

The form layout editor provides options to create, search, copy, and delete customizable sections or fields on an application, template, or workflow task. The form layout editor provides two tabs: Designer and Permissions.

The Designer page allows you to create, copy, and name a new section for your fields. You can specify the fields you want to display (and for which forms), position the fields, and set field dimensions. The Permissions page allows you to set permissions on the new section for modules, groups, and users.

ASI Drill-Downs

Civic Platform provides drill-down list values for ASI fields and ASI table columns. Civic Platform and Citizen Access users can use these drill-down values.

The ASI drill-down lists present unique data choices based on previously-selected data fields. When users complete all selections, Civic Platform displays the field or a drill-down table with the value results.

The drill-down feature allows users to filter the list of value results by performing a search within the ASI drill-down result value data. You can apply drill-down lists to multiple application-specific groups. For example, the agency can apply a table of business license types to both business or professional licenses.

Example Use Case

An administrator prepares an ASI table for multiple business license types. He sets the first option such as Agriculture and then assigns subgroups such as Plants and Trees Cultivation, and Seeds and Crops Cultivation. The administrator creates additional groups for each of the subgroups to narrow down the license options. After you assign the groups and subgroups, the options display in an ASI table in the public user view. See ASI Table Drill-Down to view a completed ASI Table drill-down.

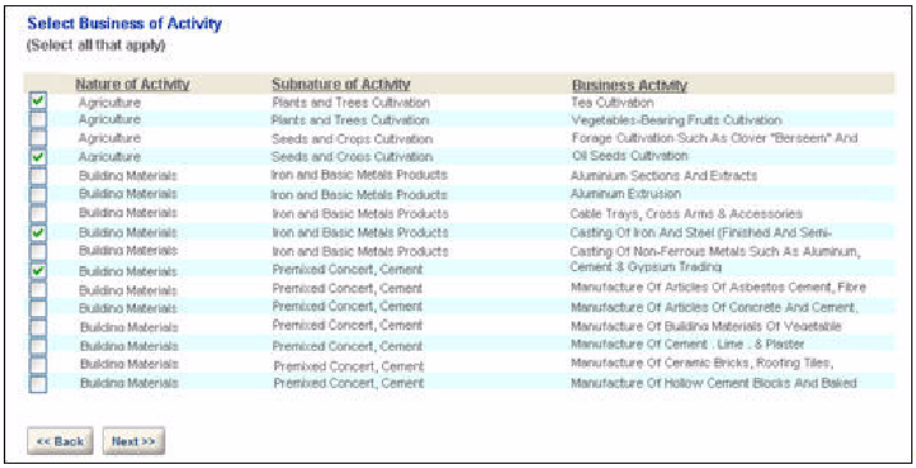


Figure 20: ASI Table Drill-Down

Understanding General Interface Settings

Civic Platform provides two user interface settings (style sheets) that control the color of all portlets in an application (General Interface Options).

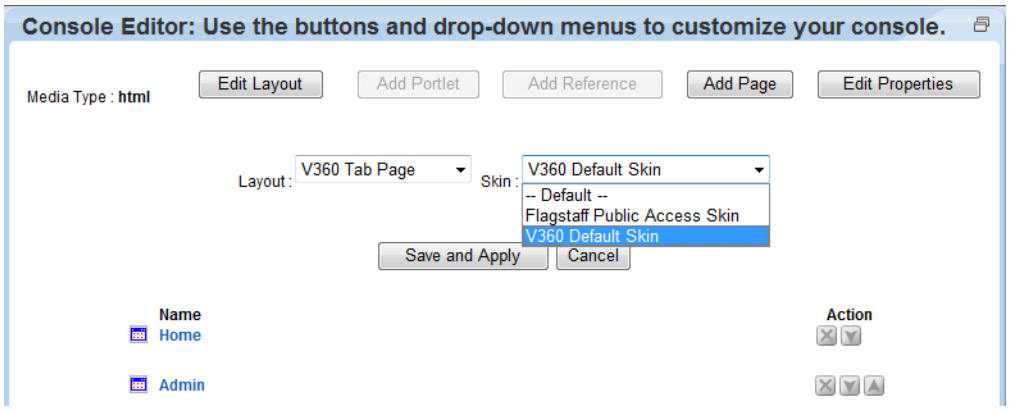


Figure 21: General Interface Options

Another interface setting lets you customize certain text that appears throughout the interface to be more consistent with the terminology that your agency uses (Text Settings).

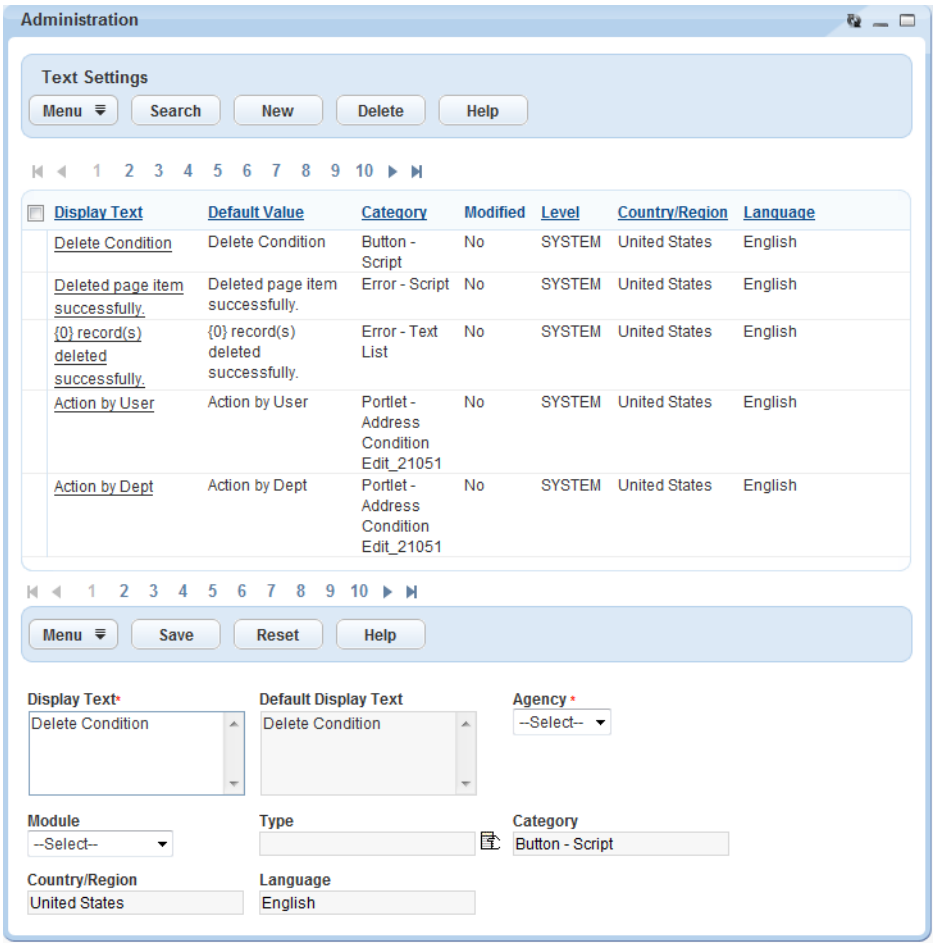


Figure 22: Text Settings

Configuring Go To Menus

Civic Platform provides the Menu Navigation function to specify the list of items that appear in the Go To menu (Go To Menu). You use the Menu Navigation function to organize Go To menu items in a way that makes sense for a module or user group. You can use a Go To menu definition (Custom Menu Navigation Tree) as a template for another module or user group by coping the menu definition and making modifications to the copy.

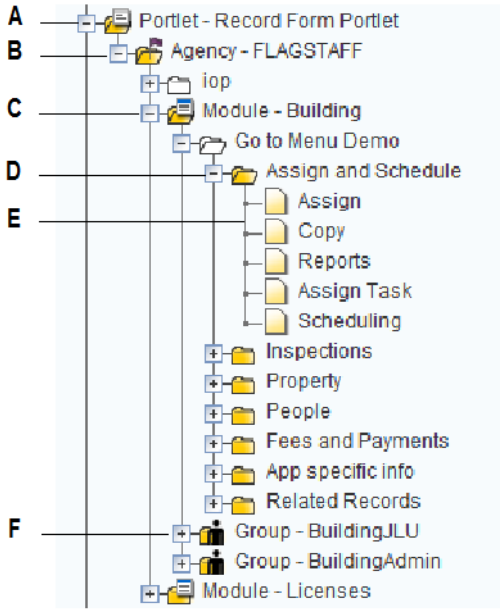


Figure 23: Custom Menu Navigation Tree

A	Portlet folder. Portlet where the custom drop-down menu displays. Four portlet types can contain the Go To menu, custom drop-down menu and custom tabs: Asset Data Management (asset details portlet), Record Form Portlet (record details portlet), Ref Address Form Portlet, and Ref Parcel Form Portlet.
B	Agency folder. You can add agency-level menu templates, or add modules and groups, then configure module-level templates and group-level templates in this folder.
C	Module folders. You can create module folders and define module-level custom menu items and custom tab.
D	Menus. You create and remove menu items from this folder.
E	Menu items. Menu items comprise user tasks.
F	Group folders.You can create group folders and define custom menu items and custom tab that work for a specific group.

Understanding Agency Branding

You can include an agency logo to facilitate user recognition.

Example Use Case

Your agency implements Citizen Access for multi-service administration. During the record creation process, the public user views fees allocated to an application from the state and city in which they live. An image displays next to the agency name to indicate whether the fee originates from the state or the city. In Citizen Access, agency logos appear on the fee page, ASI subgroup, and payment page (Agency Logo on Fee Detail page in Citizen Access).

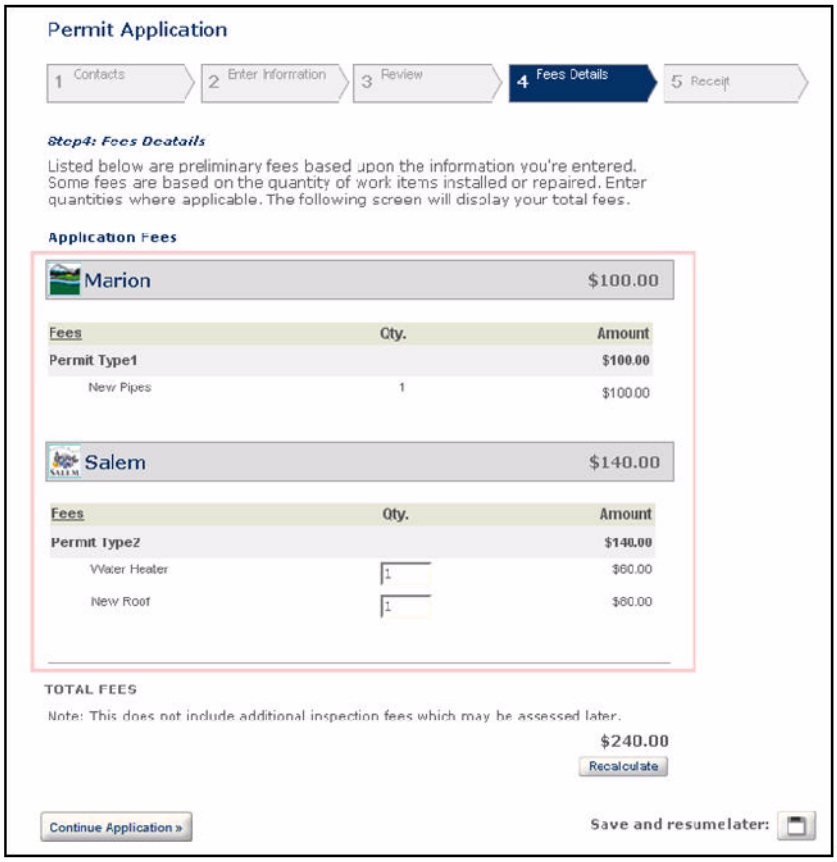


Figure 24: Agency Logo on Fee Detail page in Citizen Access

Accessing the Interface

Civic Platform uses Function IDs (FIDs) to control access to the different functions on the interface. Civic Platform enforces assess at the module level and user group level (FIDs and Standard Choices).

Applications and Records

Most Automation processing centers around records.

Related Links

Understanding Applications and Records

Understanding Common Record Types

Defining Record Types

Understanding Record Type Settings

Understanding Record Type Associations

Understanding Applications and Records

Civic Platform (and Citizen Access) users apply for an agency service by specifying the applied for service (permitting, licensing, service request, and so forth) and completing the associated application intake form. The application intake form collects the information agencies need to perform the specified service. The amount and kind of information required in the form depends on the requested service.

Civic Platform uses custom record types to define the information and process requirements for specific agency services. Civic Platform uses instances of these record types to store the information related to a specific user application. Civic Platform acts on individual records in accordance with the processes defined by the associated record type.

Record types support the general business practices of an agency and the unique processing requirements for individual records. Agencies create custom record types to define groupings of business objects (permits, for example) for which Civic Platform applies a common data model and common complex processes, such as workflow, inspection schedules, fees, and so forth.

Topics

- Understanding the Application Intake Form
- Working with Records

Understanding the Application Intake Form

The application intake form contains standard application fields, such as parcel information and contact information (Understanding Civic Platform Portlets), and other potential information specific to the associated record type.

Civic Platform provides address type groups, application information groups, and SmartChoice groups to group common sets of information for use across multiple record types. To display the information fields defined for these groups, you associate the group to the record type. You can associate an application information group with multiple record types. However, you cannot associate a single record type with multiple application information groups.

When a user creates a new application (an instance of the record type), the associated address type group, application information group, and SmartChoice group determine the type of information on the application intake form, in addition to the standard application fields, such as parcel information and contact information.

The address type group defines specific address types (business address or parcel address, for example). The application information group specifies the field types, such as text or number; display order; default value; and fee indicator for any field in an application information group. SmartChoice groups define the standard Civic Platform fields of the application form, the information required, and whether or not to validate the information against the database.

You can use Form Portlet Designer (Understanding the Form Portlet Designer) to design sections of an application form that defines which fields to display and their location.

Working with Records

Topics

- Creating Records
- Editing Records
- Copying Record Data
- Relating Records
- Deleting Records

Creating Records

You create new records from any one of many list portlets (Understanding Civic Platform Portlets). Civic Platform provides different list portlets with specific functions for processing particular kinds of record types. Creating specific record type instances in specific list portlets provides continuity for managing and processing records of the same or similar record type.

When creating a new record, you specify the record type (Creating a Record) and complete the detailed data form (Understanding Civic Platform Portlets) associated with the specified record type.

When you create an individual record in a list portlet, you create an instance of the specified record type. Civic Platform also creates instances of the other constructs (workflow, fee schedule, and so forth), and associates these items with the individual record you create. Civic Platform uses these associated items to process individual records over the course of the record life cycle.

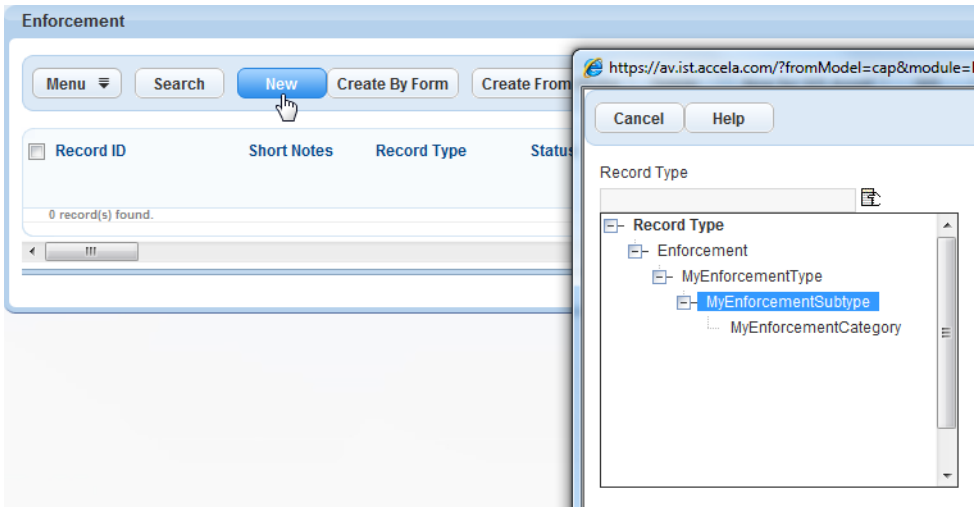


Figure 25: Creating a Record

Editing Records

After you create a record, you can edit the information about that record through the details portlet for the record. The details portlet (Understanding Civic Platform Portlets) provides all record-related information.

Copying Record Data

You can copy the data from one record to another or from an existing record to a record set.

Relating Records

Civic Platform supports creating hierarchical relationships between records. Building relationships between documents enables efficient sharing of common processes between the related records. For example, you can create a set of related records that share the same workflow, and you can execute a batch process that updates the workflow task status update for the set.

Civic Platform relates records in terms of a parent, child, or sibling relationship. Child and grandchild records branch from parent records and grandparent records. Multiple child records, with the same parent, have a sibling relationship.

Civic Platform uses two basic approaches to establish relationships:

- When you open a record, you can designate another record as its parent or child
- You can clone a record to create one or more new child records.

Both approaches enable you to transfer contact, payment, and document data from one record to the other without changing existing relationships.

Viewing Related Records in Tree View

The tree view of related records provides a graphical representation of the family hierarchy for the current record, as shown in Tree View of Related Records.

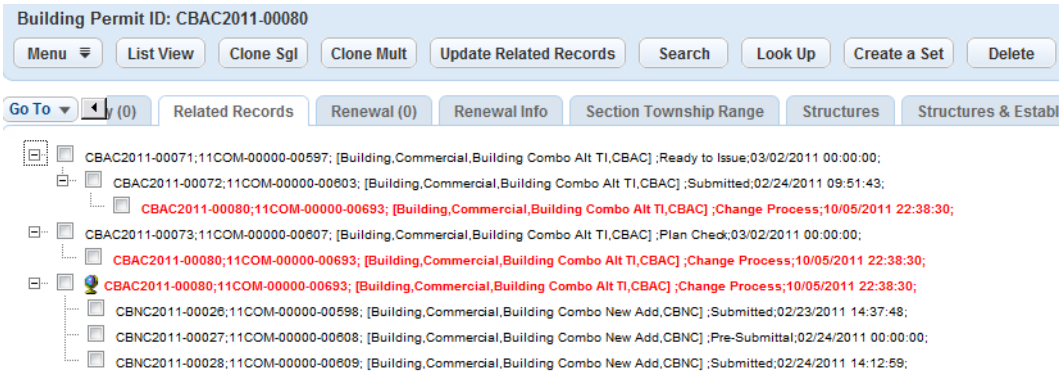


Figure 26: Tree View of Related Records

The tree view displays the current record with its parent record and child records in separate trees.

- The current record displays in red font for all tree views.
- A parent tree displays the traversal relationship of the current record with each of its top-level parents.
- The child trees display the current record with all its child records and grandchild records.
- The global icon indicates the tree for which the current record is the root.

Viewing Related Records in List View

The list view displays the current record and its related records, including the immediate parents, all the child records and grandchild records, and all the siblings. The Relation column indicates the relationship to the current record.

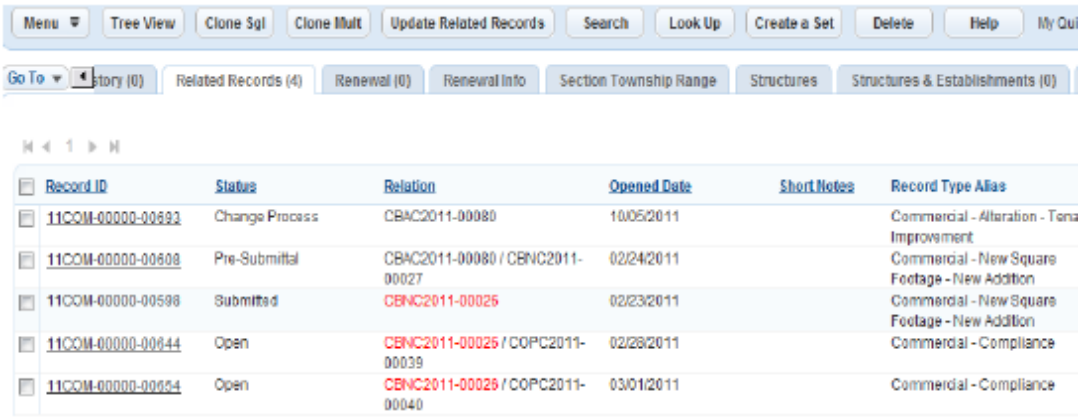


Figure 27: List View of Related Records

Editing Related Records

You can edit all related records. When you edit an record, only the edited data for the record changes. However, you can easily update all the other records by using the update related record option.

Removing Record Relationships

You can terminate the relationship between two records as needed.

Deleting Records

When you delete a record, you delete all information directly associated with the record. This deleted information includes contact and application-specific information, application history, inspections, payment history and outstanding fees, workflow history, documents, comments, and so forth.

When you delete a record, you do not delete associated information entered separately from the record. When you delete a child record, the parent record information remains intact, minus the information specific to the deleted child.

Civic Platform retains a history of deleted records.

Example Use Case

In a license renewal scenario, Civic Platform creates the license renewal as a child clone of the parent license. If you delete the parent (license) record, Civic Platform deletes the associated child (license renewal) records.

Understanding Common Record Types

The term *record* describes a range of items or forms that users manage within Civic Platform, such as application, case, license, permit, service request, and work order. Civic Platform uses a common set of processes to manage all these record types.

Civic Platform provides OOTB portlets recommended for use with each of these record types. These portlets provide common and unique best practice functions associated with each record type. You configure Civic Platform to enable/disable these functions in accordance with your agency policy.

Solution Record Types provides information on common record types used to implement Civic Platform solutions.

Defining Record Types

Civic Platform provides an interface for creating or modifying custom record types. The main record type administration page (Main Record Types Administrator Page) lists the current modules for which you have permission to create and modify record types. You can open each module to view existing record types or create new record types. You can search for a record type, enable or disable a record type, or filter a record type list.

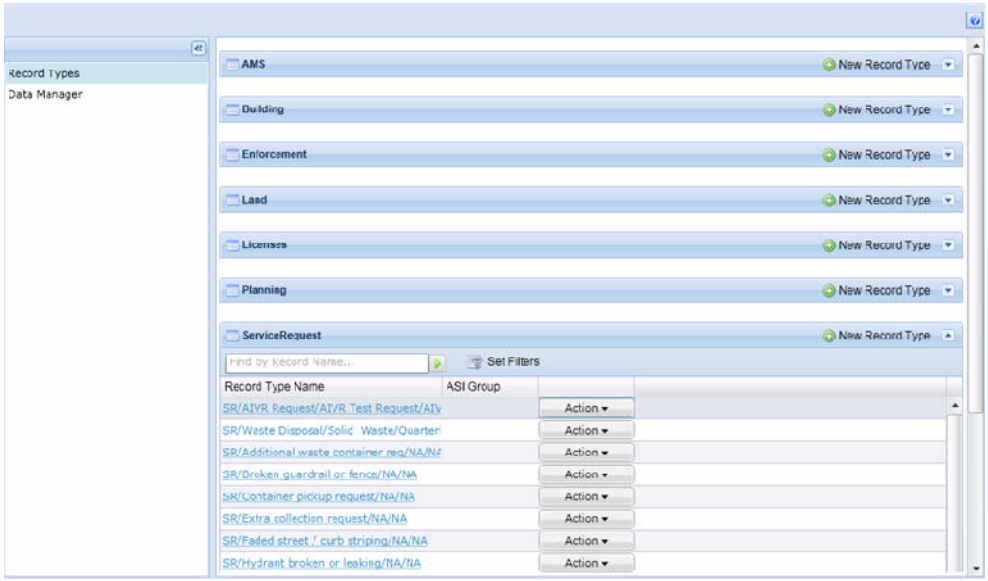


Figure 28: Main Record Types Administrator Page

Civic Platform defines record types with a 4?level structure, Group?Type?Subtype?Category, where the module name equates to the group level. When you create an individual record, Civic Platform includes an identification number based on the organizational structure of the associated record type. For example, an electrical contractor license record may use the following record type structure:

Licenses/Electrical License/Class A/Electrical Contractor.

You define the structure of a record type when you create a new record type (Creating New Record Types).

Note:

Civic Platform requires you to define a fee schedule, workflow, and SmartChoice group, and associate these items with the new record type, before creating the new record type.

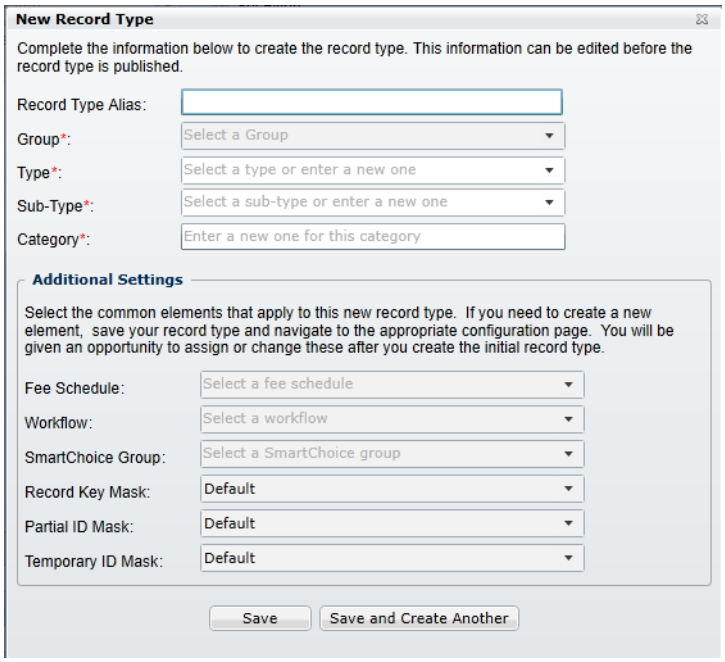


Figure 29: Creating New Record Types

You use three main record type administration pages (Summary page, Setting page, Other Associations page) to manage, edit, and create record custom record types. When you select a record type from the main record type administration page, Civic Platform displays the Summary page (Record Type Summary Page). The Summary page displays record type details such as the alias name, the module, the assigned four levels (group, category, and so forth), and record enablement.

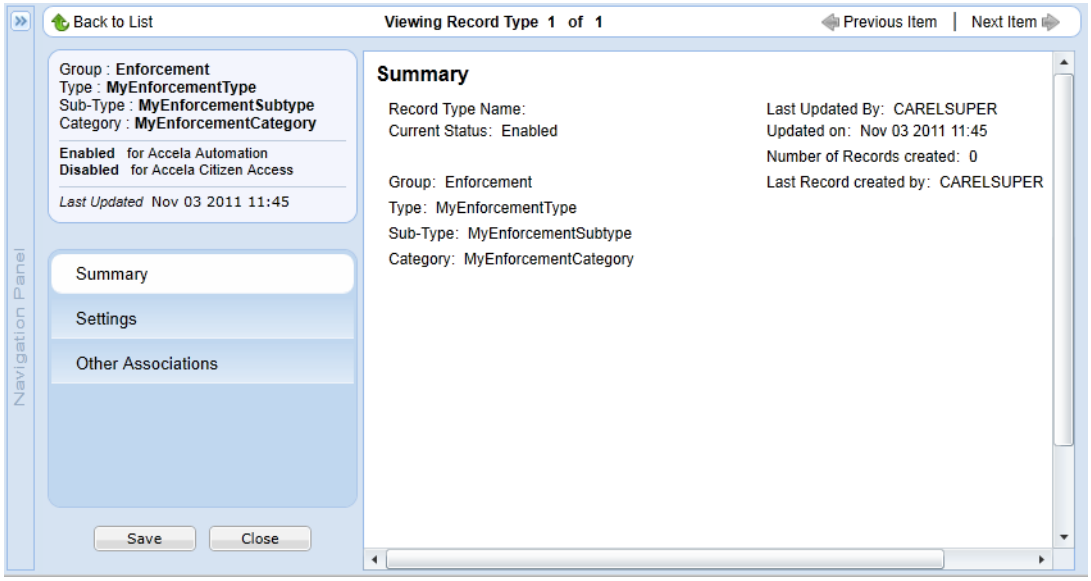


Figure 30: Record Type Summary Page

The Setting page and Other Associations page provide functionality to modify or define parameters for the custom record types.

Understanding Record Type Settings

You use the Settings page (Settings Page) to modify or define parameters related to the following:

- IVR
- Citizen Access
- Audit Frequency
- GIS.

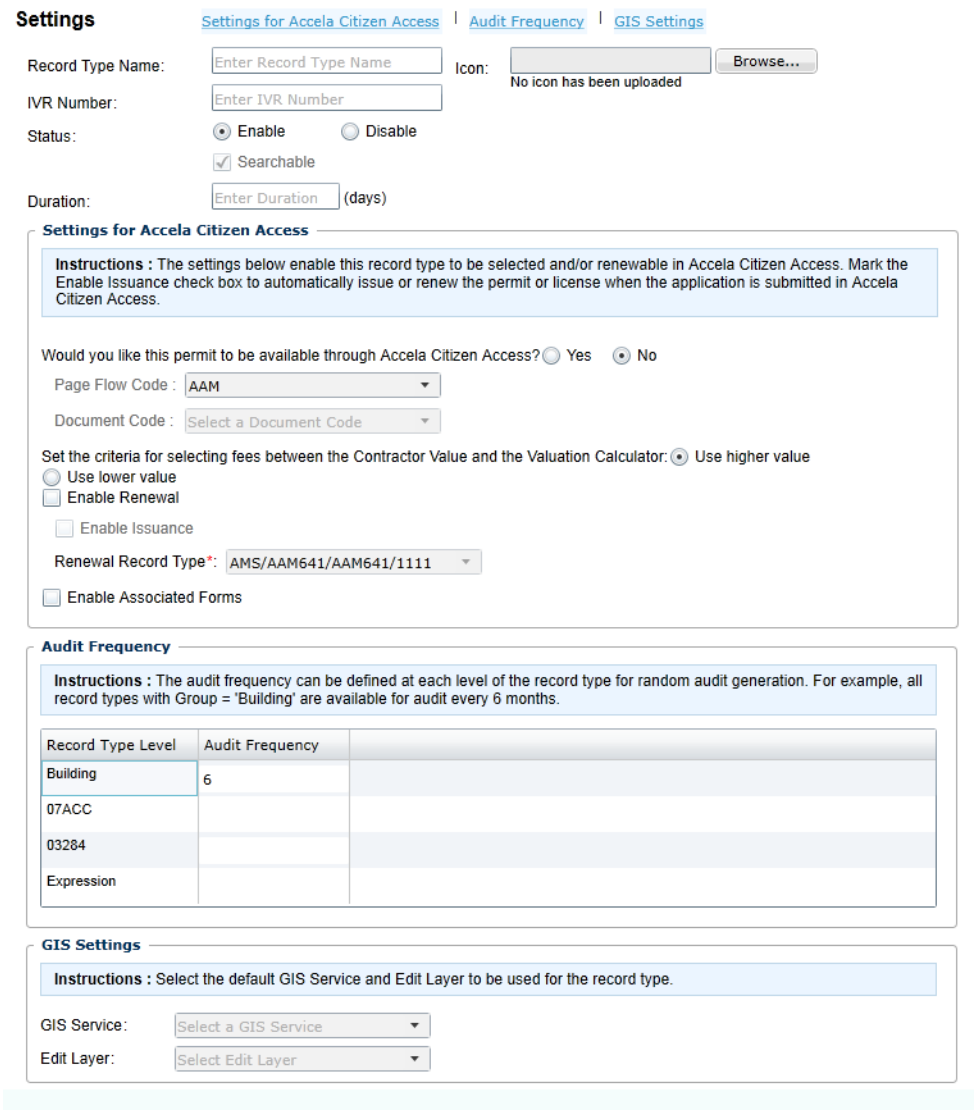


Figure 31: Settings Page

Table 1: Record Type Settings Field Descriptions

Section on Page	Field	Field Description
Settings	Duration	The number of days to complete record processing.
	Icon	The icon to indicate instances of the record type.

Section on Page	Field	Field Description
	IVR Number	A unique number, that IVR users can reference, to simplify call processing for instances of this record type.
	Status	Determines whether users can create instances of this record type.
	Searchable	Determines whether users can search disabled record types. All enabled record types are searchable by default.
	Unit of Production	The unit of measure for production units of this record type, each, feet, acres, or miles, for example. This field only displays for the Asset Management module.
	Estimated Cost Per Production Unit	The value used to generate the estimated cost for each work order. This field only displays for the Asset Management module.
	Default Production Unit	The fixed production quantity for a work orders. This field only displays for the Asset Management module.
	Value Required to Close	The production quantity Civic Platform requires before closing a work order. This field only displays for the Asset Management module.
	Email for Hearing Notification	The email address used to send email notifications for hearings. This field only displays for the Enforcement module.
	Enforcement Type	The enforcement type, abatement for example, associated with instances of this record type. This field only displays for the Enforcement module.
Settings for Citizen Access	Would you like this permit to be available through Citizen Access	Determines whether make instances of this available to Citizen Access.
	Page Flow Code	Sets the Citizen Access page flow code for this record type.
	Document Code	Sets the document code for the types of documents public users can upload and attach to instances of this record type in Citizen Access.
	Set the criteria for selecting fees	Sets the fee valuation associated with instances of the record type. You can choose to use the higher or lower value of either the contractor value or the result of the valuation calculator.
	Enable Renewal	Enables renewal of licenses in Citizen Access. Activates the **Enable Issuance** check box and the **Renewal Record Type** drop-down list.
	Enable Issuance	Enables issuance of renewals to Citizen Access. Upon completion of the renewal application, record status changes to active.
	Renewal Record Type	Specifies the record type enabled for renewal in Citizen Access.
	Enable Associated Forms	Enables display of associated forms (child records) during the record creation process in Citizen Access.
Audit Frequency (Audit Frequency)	Audit Frequency	Indicates the time interval (in months) between audits for instances of the record type. You can specify an audit frequency at any level of the four level record type definition (Creating New Record Types).When you specify an audit frequency at a parent level to other record types, Civic Platform automatically syncs the audit frequency for those record types. For example,

Section on Page	Field	Field Description
		if you modify the audit frequency for Building to 18 months, the audit frequency for Building/Commercial/ Addition/Amusement also changes to 18 months.
GIS Settings (GIS Settings)	GIS Service	The GIS service containing the map edit layer you want to use.
	Edit Layer	The map edit layer that is relevant for working with instances of the record type. For example, if the record type involves service requests for sewer lines, you can limit users to editing only a sewer map layer in GIS.

Audit Frequency

Random audits allow agency users to randomly select a group of records, based on defined parameter values, create a set of records for auditing. After Civic Platform generates the set, users can filter the set, run a report, execute a script, and otherwise audit the set.

Example Use Case

A user wants to audit twenty randomly selected electrical licenses. The user defines the parameters for the set of auditable electrical licenses and Civic Platform generates a set of twenty randomly selected electrical licenses that fall within the set parameters. The user then runs a script that contacts the licensees and notifies them that they are being audited, or automatically creates mailing labels to send hard copies. The script then generates a report to audit fees and continuing education requirements.

Setting Record Type Audit Frequency

Audit frequency determines how often a you can include a given record as part of an audit set. For example, if you define a record type's audit frequency at two months, you can audit instances of that record type no more than once every two months.

You can set audit frequencies at the agency, module, or record type level. Record type audit frequencies override module audit frequencies, which in turn override agency audit frequencies.

GIS Settings

Civic Platform integrates with GIS maps to display an address, asset, parcel or GIS object on a map. This feature provides a geographical representation for all land-use, zoning, and infrastructure information associated with a permit, service request, or inspection.

Understanding Record Type Associations

You use the Other Associations page (Other Associations) to modify or define parameters for the following:

- Sequences and Masks
- Document Code
- Expiration Code
- Inspection Group
- Address Type Group
- Application Status Group

- Fee Schedule
- Workflow
- SmartChoice Group
- Application Specific Information Group
- Virtual Folder Group.

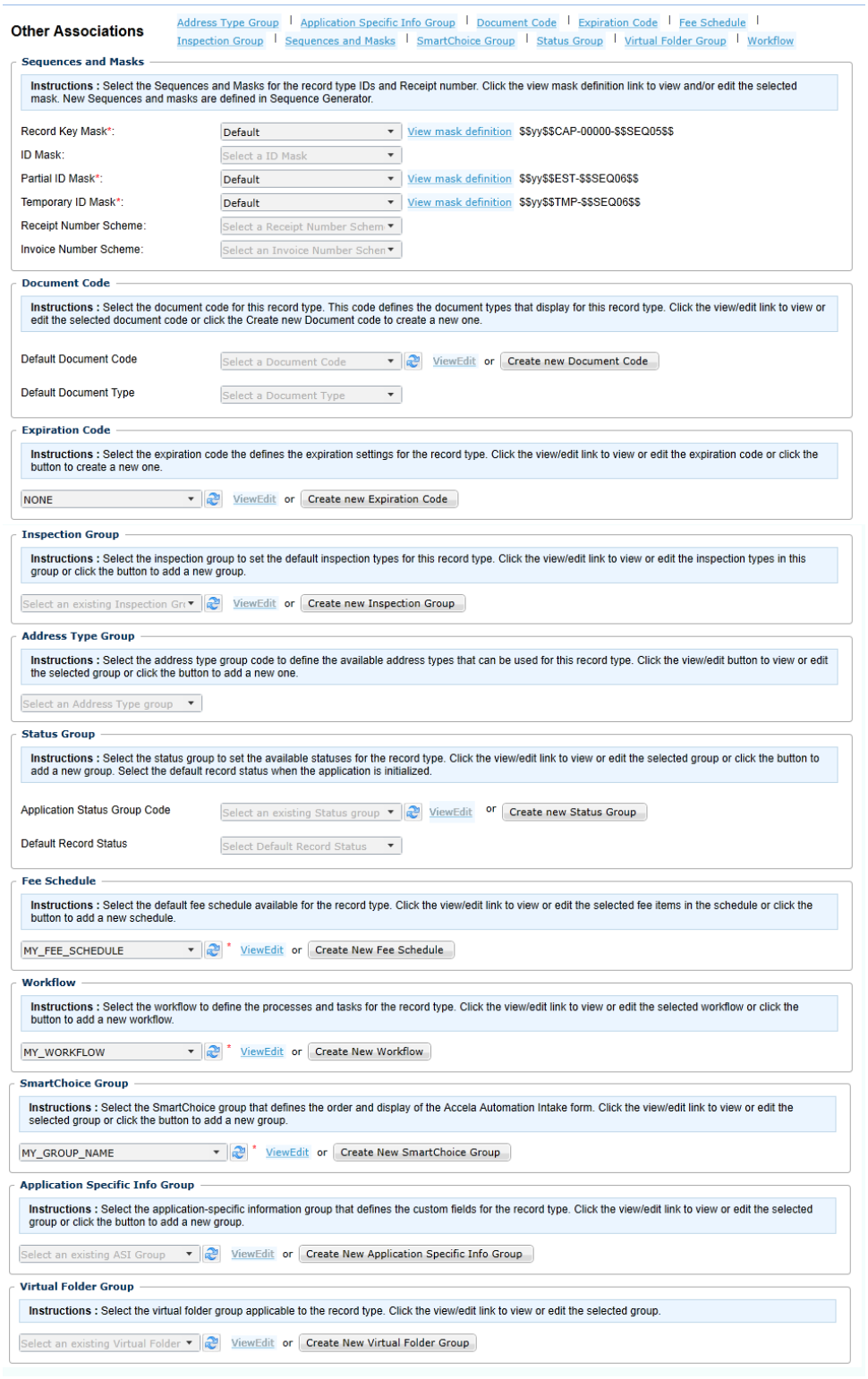


Figure 32: Other Associations

Table 2: Record Type Other Associations Fields

Section on Page	Field	Field Descriptions
Sequences and Masks (Sequences and Masks)	Record Key Mask	The name of the sequence type used to autonumber new instances of the record type. Civic Platform uses the $$yy$ $CAP-00000-$$SEQ05$$ mask by default.

Section on Page	Field	Field Descriptions
	ID Mask	The mask identifier for this record type.
	Partial ID Mask	The name of the sequence type used to autonumber, 1) partially completed records at intake, 2) records that represent an estimate, and 3) records saved in Citizen Access.
	Temporary ID Mask	The name of the sequence type used to autonumber temporary records.
	Receipt Number Scheme	The name of the sequence type used to autonumber receipts. You can use different receipt number schemes to differentiate building department receipts from code enforcement receipts, for example.
	Invoice Number Scheme	The name of the sequence type used to autonumber invoices. You can use different invoice number schemes to differentiate building department receipts from code enforcement receipts, for example.
Document Code	Default Document Code	The name of a default grouping of document types that you can attach to instances of the record type.
	Default Document Type	The name of the default document type, taken from the list of document types for the Default Document Code, to use for record attachments. Graphic image, photo, and Word document provide examples of different document types.
Expiration Code (Expiration Codes)	Expiration Code	The name of the expiration code to apply to instances of the record type. The expiration code defines the parameters for expiring records.
Inspection Group (Inspection Groups)	Inspection Group	The name of inspection group that contains the inspection related parameter values to apply to instances of this record type.
Address Type Group (Address Type Groups)	Address Type Group	The name of the address type group that contains permissible address types for instances of this record type.
Status Group (Application Status Groups)	Application Status Group Code	The name of the status group that contains possible status values for instances of the record type.
	Default Record Status	The name of the default record status, taken from the list of status values for the Application Status Group Code, associated with instances of the record type.
Fee Schedule (Fee Schedules)	Fee Schedule	The name of the fee schedule associated with instances of the record type.
Workflow (Workflow)	Workflow	The name of the workflow associated with instances of the record type.
SmartChoice Group (SmartChoice Groups)	SmartChoice Group	The name of the SmartChoice group associated with instances of the record type.
Application Specific Info Group (Application Specific Information Groups)	Application Specific Info Group	The name of the ASI group and subgroups associated with instances of the record type.
Virtual Folder Group (Virtual Folder Groups)	Virtual Folder Group	The name of the virtual folder group associated with instances of the record type.

Sequences and Masks

Civic Platform provides a sequence generator to autonumber records. You can define different sequences and different masks for different record types, such as citations, permits, invoices, receipts, and sets, to differentiate how instances of those record types display to Civic Platform users.

An autonumber sequence comprises three elements; a sequence definition, a mask definition, and a sequence interval.

The sequence definition specifies the starting value of the number, how big it can get, its interval type, and what Civic Platform does after it uses the last available number from pool of numbers.

The mask definition specifies how the sequence number displays to the user. The mask definition can combine text and numbers with the sequence.

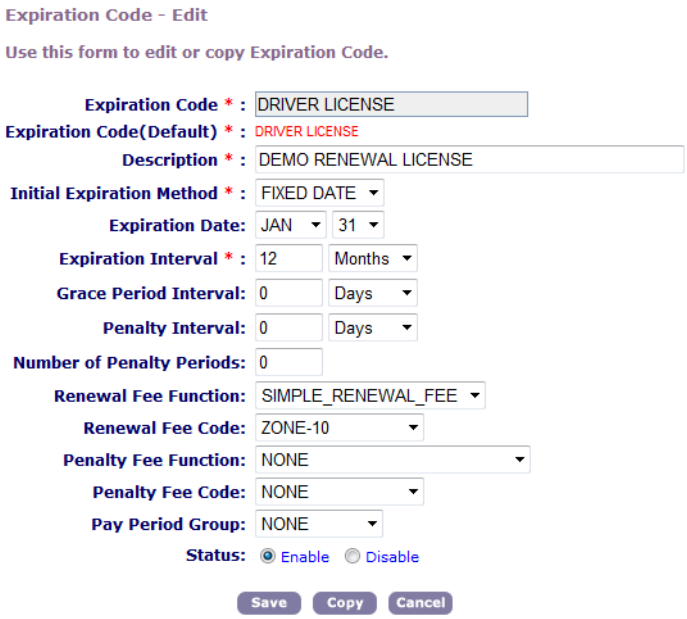
Example Use Case

You want users to see the record type and the calendar year as part of the application number. You create a mask pattern and apply it to the sequence definition in such a way that users can easily identify a residential permit application, 2009-00000190-RES, for example. The sequence interval determines the spacing of the autonumber sequence. For example, an interval of 5 generates sequences like the following; 2009-00000190-RES, 2009-00000195-RES, 2009-00000200-RES, and so forth.

Civic Platform provides best practice sequences and best practice masks for common sequence types (see *Civic Platform Administrator Guide*).

Expiration Codes

Civic Platform uses expiration codes to manage renewals of license record types. The expiration code associates various parameters that apply to a license renewal record such as expiration date, interval, grace period, penalty period, and fees.



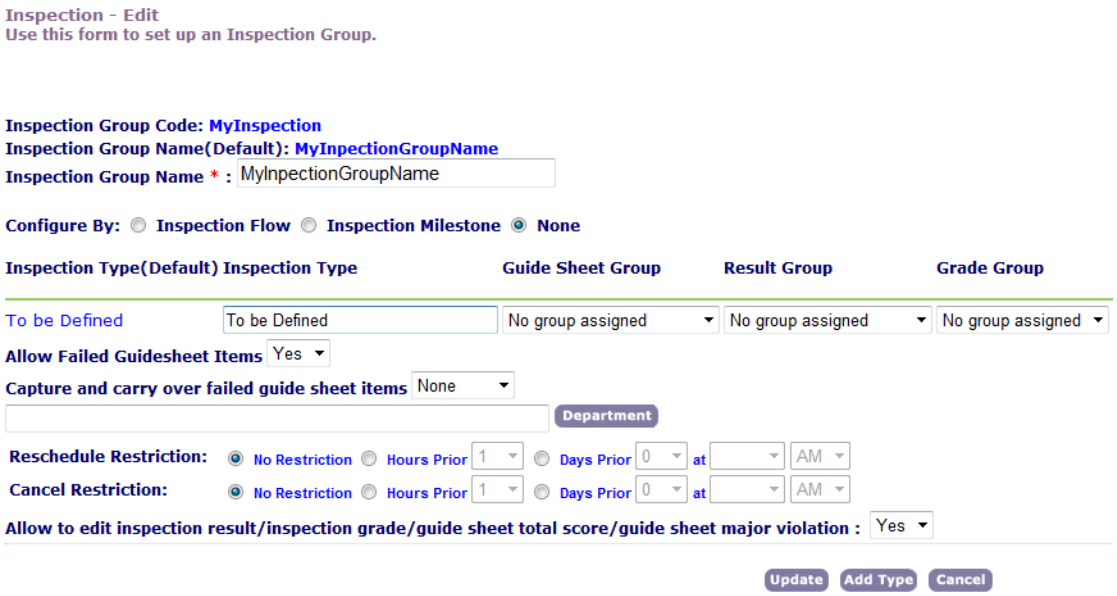
Inspection Groups

An inspection group comprises a group of inspection types which represent the set of inspections users need to complete to issue a permit or license. The inspection group defines the inspection types and the inspection order.

The inspection types specify the checklist group, result group and grade group, which provide the guidelines to follow for performing the actual inspection and for resulting the inspection score, inspection status, and inspection grade. You can define your inspection types to automatically schedule inspections and assign them the appropriate inspectors.

Example Use Case

You require a foundation wall inspection, an electrical inspection, and a plumbing inspection before issuing a building permit. You set up a building inspection group and you associate the inspection group with all building record types.



Address Type Groups

Address type groups define the set of address types that you can use with a record type.

Example Use Case

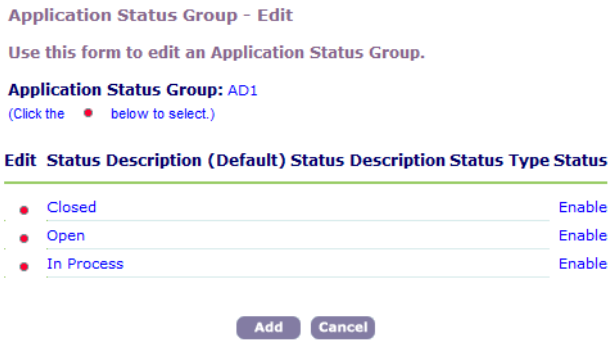
You create a commercial building address type group that contains the street address type and parcel address type. You associate the commercial building address type group with the commercial building record type. While creating a new commercial building record, you want to search the Civic Platform database for existing information related to the commercial building. You enter the street address and select the street address type as your search criteria. Civic Platform finds the record and populates the application form with existing information about the commercial building.

Application Status Groups

Application status groups comprise a common set of status values that apply to one or more record types. Civic Platform applies these status values to record type instances at various stages of their lifecycle.

Example Use Case

A group of electrical building record types have the same set of status values. A group of real estate record types have the same set of status values and these status values differ from the status values for the electrical building record types. You create two different status groups and associate one group with the electrical building record types and the other with the real estate building types.



Fee Schedules

Civic Platform uses fee schedules to organize individual fee items. Fee schedules provide the connection between fee items, modules, and record types (Fee Components for Implementation).

Civic Platform does not allow creation of new record types without an assigned fee schedule. Fee schedules, and their associated fee items become available for assessment upon submittal of new applications to an agency. A record type can have more than one fee schedule assigned to it.

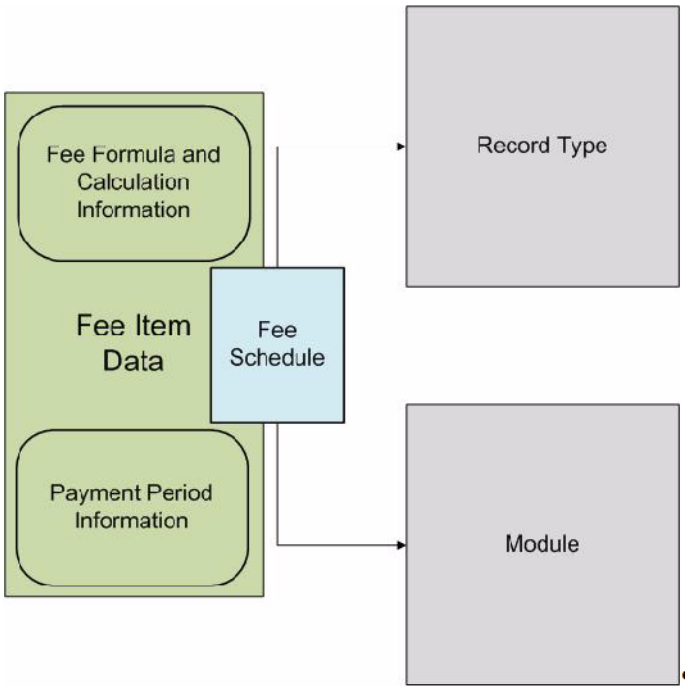


Figure 33: Fee Components for Implementation

Understanding Fee Items

A fee item represents an item or service for which you want to assess a fee. You can configure fee items in multiple ways. You can create a simple fee (Simple Fee Item), a point of sale fee (Point of Sale Fee Items), and complex fees with calculations (Complex Fee Items). You can configure ways to adjust the fees with regional modifiers, occupancy groups, or valuations (Calculating Valuation).

You can set up fee items to automatically invoice and bill upon application submission, or to delay the invoice and billing until the completion of a task, such as an inspection.

You can charge a simple fee or create more complex fees that use application information and use fee calculations. You can adjust fee totals based on occupancy groups, a job value estimate from a contractor,

or a job value based on a valuation calculator that your agency defines. You can set up different fees for materials, events, services, applications, and any other item that you can valuate.

Civic Platform provides standard fee formulas for which you define variable and constant values. Civic Platform uses these values to calculate the fee for each record type. You can also use scripts to assign fees to applications.

You can send an invoice to the customer that details the assessed fees required for the application. When the customer pays the invoiced assessed fees, the cashier applies the payment to the application and takes payment for additional point of sale items. At any time, the agency can void the invoice or transaction.

Civic Platform provides numerous ways to charge fees. You can charge fees for applications and the various processes associated with those applications.

Example Use Case

Your agency charges a standard $25.00 application fee, or a $75.00 electrical inspection fee that you adjust based on the number of electrical outlets, building square footage, and building type in which the inspection takes place.

You may want to configure fee estimation as a service to your customers. This feature allows a customer to be able to anticipate charges associated with their application, before submission to the agency.

Situations may arise where your agency needs to charge a fee for which no associated record type exists. You create a point of sale fee to accommodate these situations.

If your agency implements fee estimation, partially completed applications display applicable fee items to a customer before submission to the agency.

Example Use Case

A builder submits an application for a restaurant remodeling project. Assessed fees for the remodel application include various application fees, such as building and electrical applications. The agency sends an invoice for one or more of the assessed application fees to the builder and the builder pays the cashier. The cashier applies the payment to the application and prints a receipt. If the scope of the project changes, the agency can readjust the fees, send another invoice, and either void paid fees, or credit the payment to another record or point of sale item.

Simple Fee Item

The easiest way to configure a fee for an application type is to create a simple fee. The simple fee is a flat fee or base fee without any additional calculations, variables, or dependencies. For example, an application fee of $25.00 for each application submitted to the agency. You can also do a simple fee by job value.

Point of Sale Fee Items

When you want to charge a customer for an item unaffiliated with an application type, such as a mug, map, or hat, you can create a point of sale fee item. You capture transactions from point of sale fees on the daily balance sheet and process them through a cashier payment without an associated record. You can create, invoice, remove, pay, apply, refund and generate a receipt for point of sale fees.

Complex Fee Items

Civic Platform provides administrators with the ability to create complex fee calculations with the Fee Calc and Fee Calc Criteria features. The if-then calculations follow a true-false logic to determine values for complex calculations.

Civic Platform can calculate complex fee items based on user entered data, on an application intake form, and predefined calculation logic.

Example Use Case

On an electrical application, the number of electrical outlets determines the amount of the fee. The fee per unit for 150 electrical outlets in a home differs from the fee per unit for a 20,000 square foot office building with 5000 electrical outlets. The number of outlets impacts the inspection process and the amount of time required to do it. The fee reflects the amount of work to conduct the inspection.

Civic Platform can use the output value from one calculation as the input value for a subsequent calculations.

Example Use Case

A fee item determines a base fee amount. The fee item also includes an association to a calculation record. The associated fee calculation determines a separate amount and evaluates the two amounts to determine the total. Accela Automaton then applies the total, from the fee calculation, to the application.

Enabling Fee Estimation

Internal agency users and public users can create partially completed applications and still get an estimate of costs payable to the agency. Civic Platform does not count partially completed applications as regular applications because they have not been fully submitted to the agency for processing. Fee estimation helps users determine the fees for a license renewal without submitting the license renewal application.

Fees and Citizen Access

Citizen Access can apply all fees from a fee schedule to record types. Citizen Access assesses fees and invoices automatically. Citizen Access does not support switching between different versions like an agency user can do in Civic Platform.

Calculating Valuation

Your agency can use the valuation calculator to determine the contractor job value for certain building projects. Valuation is a method for estimating the cost of constructing a building or performing some task. Civic Platform calculates the valuation of a piece of work by multiplying a quantity such as floor area, linear feet of water pipe, or hours of labor, by a unit cost such as $25 per linear feet. Civic Platform can apply an additional state or regional multiplier, such as 1.2.

Calculating Valuation By Occupancy Code

You can configure valuation calculation to include different unit costs for each type of occupancy, such as residential, commercial, or industrial. You can further define residential occupancy types as apartments, condos, and dwellings.

Calculating Valuation By Occupancy Code Versions

You can apply different valuation calculations to the different versions of the same occupancy code. You can track multiple versions of a valuation calculator, but only one version is active at one time. After you create occupancy versions, you can group them and run them for batch processing.

Example Use Case

- An agency defines different occupancy code versions for each city within a county.
- An agency defines different occupancy code versions to accommodate increases in the unit cost of material due to inflation.
- You have a residential occupancy that contains one-bedroom apartments. You classify apartment size as an occupancy version. You use a different valuation calculator to calculate the job value for constructing one-bedroom apartments and two-bedroom apartments.

Managing Invoices and Payment Periods

Payment periods define the interval for batch processing customer invoices. The agency controls who can make exceptions to the standard billing interval, such as removal of an invoice from a partial application.

Managing Payment Periods

Within the same fee schedule you can set up several payment periods. For example, if you want to assess an inspection fee just before issuing a permit, you can set up an “Inspection Final” payment period. You can also setup payment periods that indicate which module that a user is working in, such as Enforcement.

If you are using the Business License module, the payment period acts as a flag during batch processing. The License batch process automatically processes licenses with an expiration date that you specify and assesses any necessary renewal fees or penalty fees. Depending on which payment period the expiration date falls in, Civic Platform assesses the appropriate fee.

Invoicing Options

After you assess one or more fees for an application, Civic Platform automatically invoices the fees. You have the option to invoice fees individually or as part of a group.

- Optional Invoicing. After you assess one or more fees, Civic Platform automatically invoices the fees. Administrators can disable automatic invoicing.
- Printing Invoice Batches. Administrators can allow users to print invoices in batches.

Workflow

Civic Platform provides workflows to link together and automate tasks for processing different record types. Workflows codify your agency business process by ensuring that tasks are performed in the correct order by personnel with appropriate skill levels. Workflows can also optimize throughput of record processing by balancing the load of tasks across all available and qualified personnel.

Example Use Case

You create a workflow that includes all the tasks to process a commercial building permit. This workflow includes tasks such as application acceptance, building review, permit issuance, inspections, certificate of occupancy, and closure.

The My Tasks portlet provides a single view into the tasks that active workflows assign to you. You instruct the workflow to move to the next task by changing the status of the current task to the status of the next task (from in progress to complete, for example).

Record status determines the operations you can perform on a record and your permission to perform those operations. For example, when a record changes its status, the workflow can lock the record from further activity until the status changes to a status that releases the lock.

You can provide email notifications anytime the status changes. For each task and task status, you can notify a different individual. For example, you can notify a contractor after completion of a building inspection. Civic Platform can also notify public applicants.

Example Use Case

The workflow limits access to a building permit record when the status changes to plan review. The workflow limits access by restricting the ability of users to schedule inspections or result inspections, the workflow only allows users to view the record. When the record status changes to issued, users can schedule the necessary inspections and result an inspection.

The workflow definition comprises task names, task owners, task order, task time line, and sub-tasks. You can define as many workflows as your agency needs. You can define different workflows for different

record types. You can also use the same workflows for different record types. For complex business processes, you can combine multiple processes into a single workflow hierarchy.

You can define workflows to complete tasks in sequence, complete tasks in parallel, loop back to repeat earlier completed tasks, or branch to skip tasks. The process to follow depends on how you define the workflow and the situation in which a user changes a task status.

You can add sub-tasks, also known as activities, to each task. Sub-tasks create a more detailed workflow process or outline the steps involved in each main level task. You can attach a document with a sub-task. For example, you can attach a report of the results of the plan review or upload the actual plans.

You can track the time you agency takes to process records, excluding the time spent by external parties. This time tracking can help determine where an agency can improve efficiency.

You can save a history of workflows to audit your business processes.

Assignments, Skillsets, and Workloads

Assignments allow you to make departments or make individuals responsible for certain tasks. You can make general assignments, specialized assignments, or workflow task assignments.

General assignments let you assign a record to any department or individual on your system. When you make a specialized assignment, you can choose a department member or staff member from a list, after comparing the skillset and workload of each candidate.

You rate candidates according to their skillset, or their experience level, and their current workload. Civic Platform can make automatic task assignments by calculating a skillset to workload ratio to decide who has the best skills and lightest workload. By regularly reviewing and updating workflow tasks, you can stay current with your agency's workload.

Workflow Design Options

Civic Platform provides two options for designing workflows; 1) a graphical tool, and 2) a legacy tool. The graphical design tool provides most of the functions of the legacy tool, but in an easier visually-based interface.

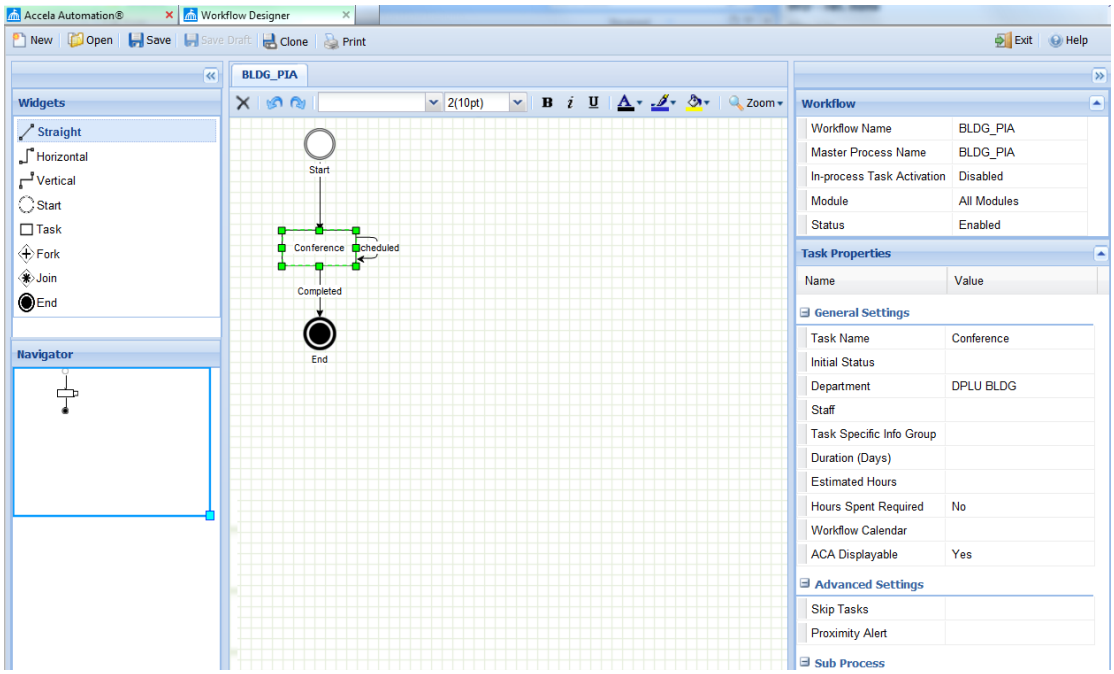


Figure 34: Workflow Designer with Sample Workflow

The legacy tool, provides a less user-friendly way to design workflows that requires you to understand the position of each task in the workflow and use proper phase and next numbers in your workflow design specification.

A workflow process phase number is a series of five 3-digit numbers that identify the unique position of this task in the workflow process and its relationship with other tasks. Depending on how you set up this number, you can determine when to activate this task and when to skip it.

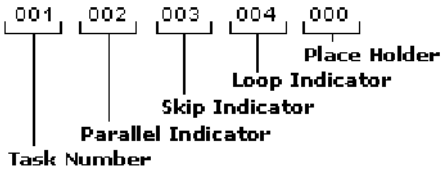


Figure 35: Example Phase Number

A workflow process next number in is a series of five 3-digit numbers that identify the next task, or tasks, in the workflow process. Depending on how you set up this number, you can set up the workflow to activate the next task, jump to a future task, return to a completed task, or skip another task.

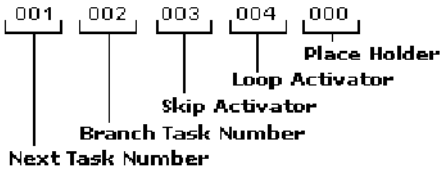


Figure 36: Example Next Number

The legacy design tool allows you to preview a visual representation of the process (Previewing a Legacy Workflow Design).

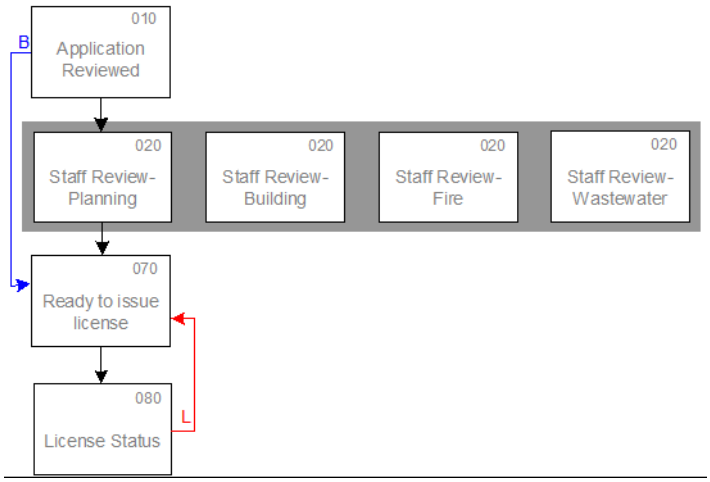
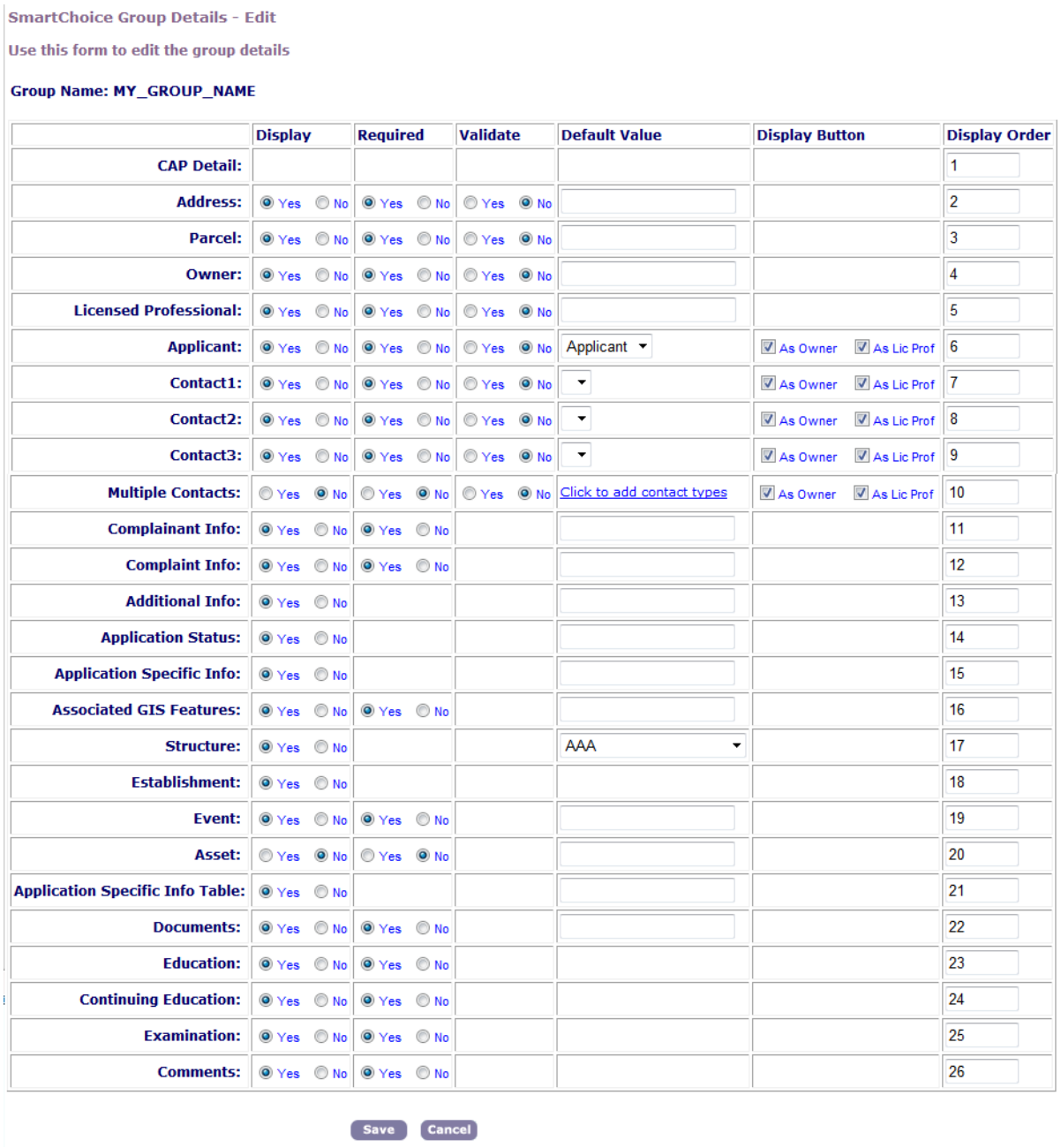


Figure 37: Previewing a Legacy Workflow Design

Consecutive tasks appear one after the other. Parallel tasks appear on the same row and they share the same parallel indicator. Blue arrows indicate branches in the process. Red arrows indicate loops.

SmartChoice Groups

A SmartChoice group determines the sections, parameters, and settings to display on the application intake form for the associated record type. You can use a SmartChoice group to define how users enter information in each section. For example, you can allow users to search for certain information, to validate it, or require that users complete certain fields.



SmartChoice Group Details - Edit

Use this form to edit the group details

Group Name: MY_GROUP_NAME

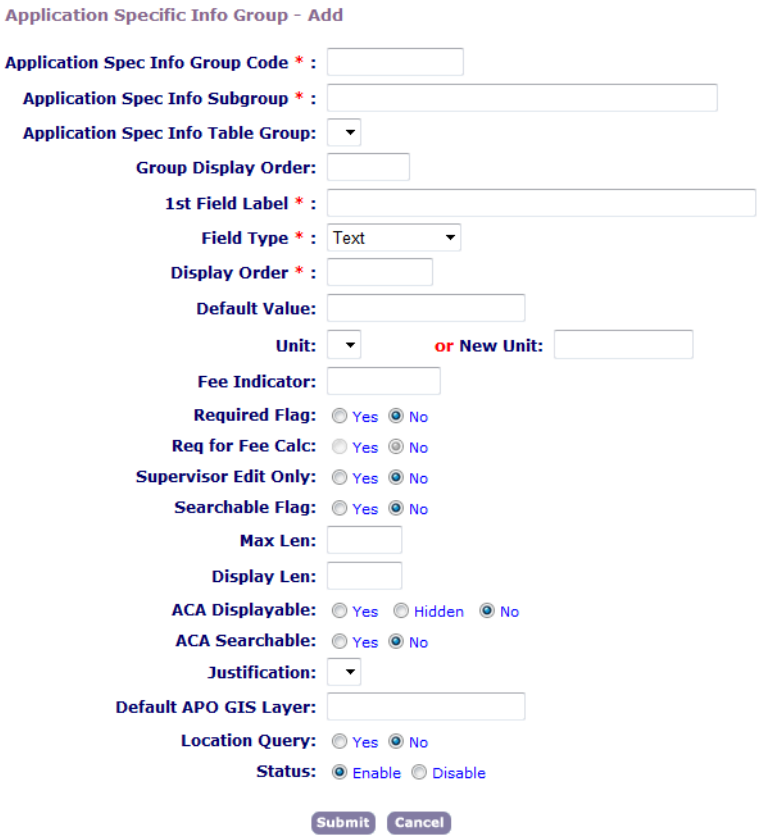
	Display	Required	Validate	Default Value	Display Button	Display Order
CAP Detail:						1
Address:	Yes No	Yes No	Yes No			2
Parcel:	Yes No	Yes No	Yes No			3
Owner:	Yes No	Yes No	Yes No			4
Licensed Professional:	Yes No	Yes No	Yes No			5
Applicant:	Yes No	Yes No	Yes No	Applicant	As Owner As Lic Prof	6
Contact1:	Yes No	Yes No	Yes No		As Owner As Lic Prof	7
Contact2:	Yes No	Yes No	Yes No		As Owner As Lic Prof	8
Contact3:	Yes No	Yes No	Yes No		As Owner As Lic Prof	9
Multiple Contacts:	Yes No	Yes No	Yes No	Click to add contact types	As Owner As Lic Prof	10
Complainant Info:	Yes No	Yes No				11
Complaint Info:	Yes No	Yes No				12
Additional Info:	Yes No					13
Application Status:	Yes No					14
Application Specific Info:	Yes No					15
Associated GIS Features:	Yes No	Yes No				16
Structure:	Yes No			AAA		17
Establishment:	Yes No					18
Event:	Yes No	Yes No				19
Asset:	Yes No	Yes No				20
Application Specific Info Table:	Yes No					21
Documents:	Yes No	Yes No				22
Education:	Yes No	Yes No				23
Continuing Education:	Yes No	Yes No				24
Examination:	Yes No	Yes No				25
Comments:	Yes No	Yes No				26

Save Cancel

Application Specific Information Groups

An Application Specific Information (ASI) group defines a set of information associated with records of a particular record type. This information includes address, parcel, and contact information, in addition to standard application fields.

The ASI group specifies field types, such as text or number; display order; default value; and fee indicator for any field in the ASI group. You can run reports against ASI group data.



Application Specific Information Subgroups

For each application-specific information group code, you can delete or arrange the display order of subgroups. You can create new subgroups or edit existing subgroups, and add them to the group code.

If your agency provides Citizen Access, you can perform the following Citizen Access-specific configuration tasks:

- define the layout of information
- create instructional text
- set the display in pageflow
- arrange the display order.

Application Specific Information Table Groups

Administrators can set up tables that let users add application-specific data for application to multiple items. An ASI table can have as many specific data fields with individual data types as the administrator defines. You can make the table data fields available for fee calculation and for Event Manager scripts.

Example Use Case

An agency wants to store the quantity and manufacturer for different types of fixtures, such as bathtubs, sinks, and drains. The attached table's name becomes the label Civic Platform displays to the user.

Application Specific Information Table Drill-downs

Civic Platform associates ASI table drill-downs to record type application intake forms through the ASI group or ASI group table to which the ASI table drill-down associates. (Understanding the Form Layout Editor)

Virtual Folder Groups

When you upload an attachment in either Civic Platform or Citizen Access, you select from a pre-defined list (or group) of ‘virtual folders’ or create a new virtual folder. However, Citizen Access users uploading an attachment can only select from a pre-defined virtual folder group.

You use virtual folders to organize uploaded attachments into groups (folders). You can create as many virtual folders and folder groups as you need. You use Standard Choices values to create the folders you want (see *Civic Platform Configuration Reference*).

Solution Record Types

Automation provides processes and record types oriented for common agency solutions.

Related Links

Understanding Land Management

Understanding Asset Management

Understanding Licensing and Case Management

Understanding Service Requests

Understanding Land Management

Note:
The Land Management solution includes the Building, Enforcement, and Planning modules.

Civic Platform allows you to create Address, Parcel, and Owner (APO) records and associated them with specific properties. You can associate multiple addresses, owners, or structures with a parcel. Civic Platform manages the interrelationship of all these objects.

Civic Platform can synchronize address, parcel, owner information with a record. For example, if you associate a parcel with an address and you add that address to a permit record, information from the associated parcel automatically populates the record.

Topics

- Parcels
- Addresses
- Owners
- Structures and Establishments
- Property Templates
- Electronic Document Review
- Inspections
- Checklists
- Attaching Documents to an Inspection
- Understanding Enforcement

Parcels

A parcel is a piece of land with a specific location and legally defined boundaries. The county assessor's office typically maintains information about all land parcels within its jurisdiction and imports parcel information, from a file, into Civic Platform.

Parcels are the central component of a land management solution or building permit solution. Owner, address, contact, fee, and application records exist in relation to work on a particular parcel. For example, an applicant may want to build an apartment complex on a particular parcel.

Establishing a Parcel Genealogy

Civic Platform provides parcel genealogy functionality that lets you keep a history of parcels on your system and the applications associated with those parcels. Civic Platform supports several types of relationships that you can establish between existing parcels (Parcel Genealogy Transactions). For example, you can split a parent parcel into multiple descendents, or you can merge parcels together in a spousal relationship. You can also choose to combine multiple parcels into a single descendent. Each time you establish a relationship between parcels, Civic Platform records your action as a genealogical transaction.

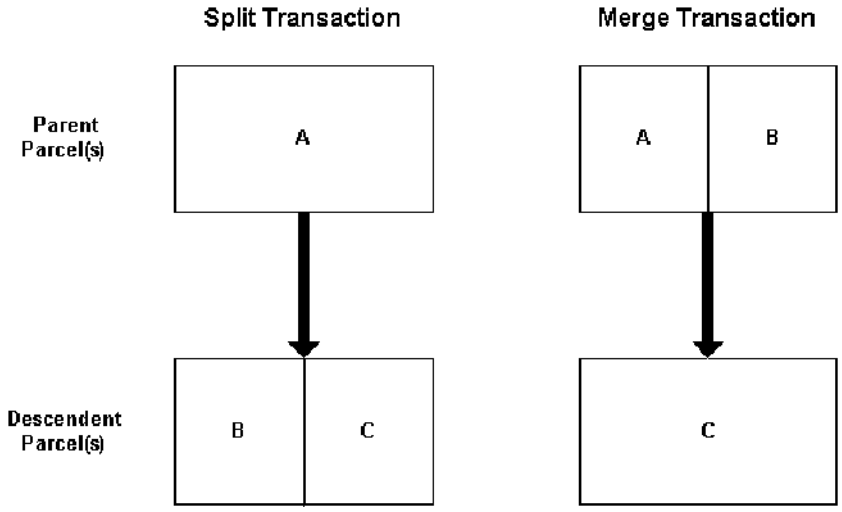


Figure 38: Parcel Genealogy Transactions

Addresses

Addresses are physical locations related to parcels. You can have multiple addresses for a parcel. To effectively manage parcels and other land divisions in your jurisdiction, you can add and edit addresses as necessary.

Owners

Owners make up an important part of your land management system. You link owners to specific parcels so that the owner becomes the responsible party and point of contact for the parcel. The parcel owner must initiate or approve all work done on a parcel.

Structures and Establishments

The land management solution provides the building module to manage structures and establishments. A structure is a building or development that can contain multiple commercial units, residential units, or establishments. An establishment is a commercial entity that occupies space in a structure.

Civic Platform manages APO data and associated establishments and structures. APO data for an establishment can differ from the APO data of the structure in which the establishment resides. Civic Platform allows users to create separate structure records and establishment records, each with their own APO data.

You can associate establishment records with structure records to track relationships between structures and establishments and retrieve information from associated records. You can use the APO data for structures and establishments to create and manage permit applications and enforce codes. You can set up structures to keep an inventory of all the structures related to parcels and applications referenced on your system.

Example Use Case

You have an the apartment/commercial structure type and you create several establishment types specifically related to this structure type, such as apartment, restaurant, coffee house, and book store.

A structure can have one or more location, owners, or child structures. Depending on the structure type, you can customize certain details about the structure based on a template for that structure type.

Example Use Case

You set up a downtown mall structure that occupies two different parcels, is co-owned by three different individuals, and contains several different storefronts within the main structure

Property Templates

You can set up generic APO and structure templates to help users capture information about an actual address, parcel, owner, or structure. The fields that you set up on a template display are in addition to the standard fields implemented with Civic Platform.

Electronic Document Review

Civic Platform integrates with Adobe Acrobat X Pro to provide you with the ability to efficiently manage PDF documents and plans for the entire life cycle of a project. With the Electronic Document Review feature, you can attach single or multiple PDF documents to a record, and then assign them for review to one or more reviewers. Reviewers access and manage their assigned documents by through their My Tasks portlet, search, or by navigating to the appropriate list portlet.

You can open attached PDF documents in Adobe Acrobat X Pro directly from Civic Platform. After you open a document, you use Acrobat X Pro annotation tools to review, comment, and mark up documents. Civic Platform provides a set of standard review stamps to mark plans in a way that reflects the review status. When you complete your review, Civic Platform saves your commentary and annotations.

Civic Platform provides a toolbar in Adobe Acrobat X Pro that you can use to access ICC eCodes, state codes, and local codes. Reviewers can look up codes and regulations and use standard copy/paste functionality to cite regulations by adding annotations to the PDF.

Civic Platform provides a document audit log that records all changes made to attached documents. These changes include attaching a document to a record, adding annotations and comments, modifying annotations and comments, and saving annotations and comments.

Inspections

Inspections are a necessary part of the building permit process. Your agency may need to complete inspections on new developments, homes, or even inspect complaints related to a certain project.

You can manage inspectors and their schedules, manage inspection dates, schedule inspections, and record inspection results for an application. You can specify the inspection flow process for all the inspections between application submission, and permit issuance or license issuance.

As the agency administrator, you can set up automatic inspection scheduling. To schedule inspections automatically, you need to consider geographic district, inspector discipline, calendar availability, and workload availability. If you enable automatic scheduling, Civic Platform assigns the inspection to the inspector with the lightest workload in the appropriate district and discipline.

You can also set up generic inspection types and inspection checklists that inspectors use to perform complete and appropriate inspections. Depending on the group of inspection types that you associate with a certain application type, inspectors know which inspections they need to complete.

Example Use Case

You include a foundation wall inspection in the group of inspections required for a certain building project.

You can determine the order in which to complete inspections and the method to record inspections of multiple units on one application. You can carry over failed checklist items from an inspection type to another inspection type. You can also copy checklists from one inspection type to another.

You can set up an inspection flow process that signals the need to complete a new inspection, within a specified time, upon completion of the last inspection.This functionality is helpful when an inspection must recur at regular intervals, every six months for example.

Example Use Case

You schedule annual food establishment inspections and post the inspection report to public users.

Topics

- Understanding Inspectors
- Creating Inspector Profiles
- Managing Inspection Scheduling

Understanding Inspectors

Government agencies can use agency inspectors or external inspectors to conduct inspections.

- Agency Inspector
- External Inspector

Agency Inspector

Agency inspectors are agency employees who record inspection results from the field or from the agency office using Mobile Office. Agency inspectors can assign inspections to the other agency inspectors or external inspectors through Civic Platform. Agency inspectors can review inspection results from external inspectors and update the inspections accordingly, perform a random audit of completed inspections, and manage the accounts of external inspectors, through Civic Platform.

External Inspector

External inspectors are registered public users with a license who work with inspections on behalf of the agency using Citizen Access. The permissions for registered public users and licensed professionals, set in Citizen Access, apply to external inspectors. However, Citizen Access allows only external inspectors to access the Upload Inspection Results page. From there, external inspectors can view their assigned inspections, download the list of new inspections, upload inspection results, and provide evidence of correction to the agency for discovered violations.

External inspectors can be one of the following types:

- **Contract inspector**. Typically a certified or licensed professional or a certified or licensed company that an agency hires to complete periodic or annual inspections on devices such as boilers, elevators, escalators, or cranes.
- **Self-certified inspector**. Typically a certified or licensed professional such as an architect, general contractor, or a plumber that is not an agency employee but the agency gives permission to do their own inspections rather than have the agency inspector complete the inspections. Self-certified inspectors usually go through a self-certified process to gain trusted status with the agency.

Each external inspector has the following:

- **A public user account**. The external inspector uses it to access Citizen Access. An agency user can create the public user account for the external inspector, or the inspector can create the public user account with Citizen Access.
- **A Civic Platform user account**. Agency users assign inspections to this account. Civic Platform automatically creates this account upon the creation of the public user account. However, the inspector cannot log in to Civic Platform with this account.
- **One or more approved licensed professionals in Civic Platform**. At least one approved licensed professional must relate to the public user account of the inspector. Agency users can do that when creating the public user account for the inspector. Or the inspector himself associates a licensed professional with his public user account through Citizen Access but according to agency settings, agency users may need to approve the association. When the licensed professional associates with a record such as a boiler, the inspector is responsible for all inspections on such a record.

Creating Inspector Profiles

You setup individual inspectors as Civic Platform users with an associated inspector profile. The inspector profile identifies information about the inspector, such as daily inspection maximums or units, districts, disciplines, and availability. Civic Platform uses this information to assign and schedule an appropriate inspector when automatically scheduling inspections.

Managing Inspection Scheduling

You can associate a parent inspection with one more child inspections, which provides a visual and reportable linkage between inspections and enables you to differentiate the parent inspection from its follow-up inspections.

Example Use Case

A restaurant has related inspections such as food preparation, food display, and food equipment.

Customers can schedule or reschedule their own inspections online, through Citizen Access. If your agency implements Citizen Access inspection scheduling, your agency can determine when public users can schedule an inspection. Your agency can also limit public user inspection scheduling to only allow requests to schedule an inspection or limit which inspection types they can reschedule or cancel.

Checklists

As a user tries to complete an inspection, he or she can use a checklist. The checklist explains how to complete the inspection properly, in what order you should complete tasks, and any other comments pertinent to completing an inspection. You can set up any number of inspection checklists with any number of items on each list.

Checklists provide a way to organize information required to complete an inspection. You can customize these lists to meet your needs by including instructions, order of process, and any other information necessary for someone to complete an inspection successfully.

You can group checklists together to associate the checklist group with an inspection type. When entering inspection results and completing a checklist, the inspector can choose any of the checklists in the group for the inspection type of interest.

You can carry over failed checklist items to a new checklist for the next inspection. You can also copy a checklist to a new inspection.

You can use checklist status groups to group a set of status values together, for inspections that must conform to specific code requirements. For example, you can use checklist status groups for building and related inspections, such as mechanical, electrical, uniform plumbing, zoning, and land use.

Attaching Documents to an Inspection

You can add documents and graphics to an inspection.

Example Use Case

During a fire inspection, the inspector takes a photograph of broken fire equipment. The inspector then uploads the photograph into the inspection record. The inspector can also upload attachments for multiple inspection types.

Understanding Enforcement

Civic Platform provides the Enforcement module to collect, manage, and resolve enforcement cases for complaints and violations against specific individuals, properties, owners, contractors, and businesses. Based on the severity of a violation, you can issue a citation. You can create and store citations under the appropriate case, along with evidence, applicable court dates, and defendant information.

Example Use Case

A public Citizen Access user lodges a complaint about an abandoned vehicle on private property. Civic Platform creates a code enforcement case and routes the case to the police department. The police investigate and discover an illegal vehicle on private property. The police issue a citation for trespassing and vehicle abandonment. The citation goes to the vehicle owner and Civic Platform schedules a hearing date for the defendant. The police attach pictures of the car and the car contents to the record. Between the time of the citation and the hearing, authorities hold the car and pictures at various locations for investigation. Civic Platform tracks all the information about the case.

Managing Evidence for a Case

Law enforcement authorities and investigators collect evidence, which can include discussions, decisions, and investigation results, to support a claim. You can upload and attach pictures of physical evidence, along with any other documents, to a case. Civic Platform aggregates all evidence in a case record.

Example Use Case

A complicated case regarding domestic violence involves a weapon, a blood-stained shirt, articles indicating drug use, cell phones, items displaying fingerprints, personal records, a wallet, and hair samples.

Anyone with supervisor rights in Civic Platform can track the chain of custody and disposition of evidence. The chain of custody reflects who has the evidence and where they have it and when they have it. Authorities with supervisor rights check the evidence in and out of Civic Platform.

Example Use Case

An investigator takes the evidence, such as a blood-stained knife, to a laboratory for DNA matching. A user with supervisor rights checks out the corresponding item in Civic Platform and comments that Joe the investigator took the evidence to XYZ Laboratories for DNA matching. 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 supervisory rights checks the evidence back into Civic Platform and specifies the location, which is storage area C at Building ABC. Civic Platform stamps the entry with the date and time and saves it in history.

Understanding Asset Management

Topics

- Work Orders
- Asset Attributes and Templates

Asset Types

An asset comprises any object that an agency owns or maintains, such as a car, truck, manhole, or section of sidewalk. Asset types determine the kind of record users create when they add assets into the agency inventory.

Civic Platform, when coupled with GIS, can synchronize asset types in Civic Platform with GIS. This feature enables a data representation and visual map representation of your asset records.

Asset types provide a common classification for similar objects, which includes asset type specific attributes. You can define multiple asset types, but an individual asset can only belong to one asset type. For example, you can categorize pickup trucks, sedans, and compact cars as the automobile asset type, and fire hydrants as the hydrant asset type.

Over time, many assets require visual inspections to effectively manage their life cycle. A popular city sidewalk is a valuable asset and it should have visual inspections to ensure its integrity for pedestrians, wheelchairs, and strollers. Civic Platform provides an asset condition assessment type to categorize assets that require similar types of ongoing maintenance.

Topics

- Asset Type Functions
- Linked Assets
- Asset Group Update
- Asset Contacts

Asset Type Functions

Civic Platform provides a basic set of asset types for your agency. To meet agency needs, you can add new asset types or modify existing asset types. Civic Platform provides the following functions to manage asset types:

- Assign an ID mask
- Synchronize with GIS
- Associate with a work order type
- Define the asset class types.

Working with Asset Class Types

Civic Platform provides five asset class types; component, linear, node-link linear, point, and polygon. Node type management provides the ability to specify which asset types you can use as nodes for the node-link linear asset type.

Synchronizing Asset Type Records with GIS

You can designate GIS as the master inventory for an asset type in which case Civic Platform reads the asset inventory from GIS and displays a spatial representation of the asset type on an GIS map. Civic Platform and GIS reflect the same information about asset records when you perform a synchronization. You can create an asset/GIS batch job to synchronize asset and GIS records at regular intervals.

Linked Assets

You can associate assets with other assets.

Example Use Case

You link fire hydrants link to the water lines that feed it. You link telephone poles to the telephone wires that run across them. You link manhole covers to the streets they lie in and the pipes beneath them. You link a building might to the furniture and equipment housed within. You link trucks and other heavy equipment to the shop or garage that stores them.

Agencies determine the rules for linking assets. Civic Platform links assets by establishing a parent/child relationship. A parent asset has dependent assets or child assets that do not exist without the parent. A parent asset can be a child to another asset.

Example Use Case

A building is a parent asset to an HVAC unit. A sewer pipe is a parent to a fire hydrant, but the pipe is a child to a sewer main.

After you link assets, you can view the relationship to better track and manage changes and more easily find assets that relate to a project.

Asset Group Update

You can update information associated with all assets in a group at the same time.

Example Use Case

You put several streetlights or a variety of assets in different parts of town, into service on the same day.

Asset Contacts

Agency users can review the individuals or contacts associated with an asset and add or remove asset-contact associations.

Asset Condition Assessments

Condition assessments apply to assets that change or deteriorate over time. These assets may require a visual condition assessment to effectively manage their life cycle.

You can group assets together that require the same condition assessment, enter the condition assessment findings, and create a history of assessments and performed maintenance.

Example Use Case

Once a year you inspect vehicles for safety and test for emissions. Once a year you inspect city sidewalks for cracks.

Topics

- Working with Condition Assessment Attributes
- Working with Asset Ratings

Working with Condition Assessment Attributes

Civic Platform provides for condition assessment types that define a set of attributes to assess an assets condition. The attribute values provide the assessment of an asset’s condition.

Example Use Case

A hydrant condition assessment type includes attributes for flow coefficient, flow hydrant, flow hydrant location, and test coefficient. In this case, each condition assessment attribute records one static value for hydrants that does not change.

You can use condition assessment observations for condition assessments that change. A condition assessment observation can have an unlimited number of observations on a single condition assessment.

Example Use Case

A vehicle condition assessment type includes attributes for tire tread depth, windshield condition, and mileage. Over time, the values for these attributes change.

Working with Asset Ratings

You can assign ratings to assets, asset groups, and asset types. You can manually enter a rating value or automatically calculate a rating value based on a formulaic combination of multiple criteria.

Civic Platform stores all manually entered or automatically generated ratings. You can use these historical ratings to graphically display the history of each asset's condition or the average condition of a group of assets.

Inspectors can rate assets on criteria such as safety, risk, or overall condition. Administrators can create rating formulas that take into account factors like condition assessments, work orders, service requests, and direct updates. The rating formula can access asset details, asset attributes, condition assessment details, and condition assessment attributes.

You can use ratings to quantify the status of assets and observations of assets; show all pump stations that are of high risk and in poor condition, for example.

Work Orders

A work order is a record or a request to perform a job. Most work orders have several types of associated information that might include address information, costing information, related assets, associated documents or pictures, inspections, parts, and maps.

Example Use Case

You need to service several fire hydrants in a neighborhood this month. You create a work order for one of the fire hydrants. Because the fire hydrant is an asset, you search for the fire hydrant and Civic Platform copies the specific information about the fire hydrant, including the address, to your new work order. You identify the parts associated with the work order, the cost of the parts that are necessary for routine maintenance. You attach a PDF schematic of the fire hydrant. When the work order is complete, you copy it for each fire hydrant, and correct the asset and address information for each copy. At the conclusion of the maintenance, an inspector sees that the hydrants work according to their specifications.

You can create work order templates to pre-populate fields in a work order. Your agency can define one or more templates that specify required data and tasks for new work orders.

Topics

- Managing Work Order Tasks
- Managing Work Order Types
- Work Order Parts Inventory

Managing Work Order Tasks

Civic Platform supports a lower level of detail on work orders, referred to as a work order task. A work order task is a step in completing a work order activity. These tasks provide a checklist or set of instructions for the individual or crew to perform the work, and are adjustable per work order.

Example Use Case

You need maintenance completed on a vehicle. The technician creates a single work order and adds multiple tasks to the work order, such as changing the oil and inspecting the brakes.

You can attach work order tasks to work order templates to specify standard tasks required to complete a work order. Civic Platform automatically applies these work order tasks to work orders when you create the work order.

Managing Work Order Types

Work order types provide categories of work orders.

Example Use Case

Your agency uses one work order type to classify maintenance work and repair work for street lamps, and another work order type to classify maintenance work and repair work for street segments.

You can associate a work order type with different work order tasks.

Example Use Case

An oil change work order task applies to several types of work orders, such repairing a fleet or tuning an engine.

When you associate a work order type with a work order task, you narrow the scope of available tasks, which helps supervisors identify relevant work order tasks when they modify a work order.

Example Use Case

A supervisor wants to add a task to a water pump maintenance work order. When the supervisor looks up tasks, none of the tasks associated with another work order type display.

Work Order Parts Inventory

The parts inventory allows an agency to track the usage and supply of consumable parts. The parts inventory defines each individual part, the location of the part, and the contact information about the vendor or manufacturer. You link these parts to work orders. When you use these parts while fulfilling a work order, Civic Platform updates the part supply and part location.

Example Use Case

You maintain a fleet of trucks and three of these trucks require an oil change. You create a work order for the oil change. You use the part inventory to find the oil filter needed for the trucks, the total number of oil filters in stock, and the filter location. If you need more oil filters, you can find an approved vendor to reorder more filters. When you assign the parts to the work order, Civic Platform subtracts the three oil filters from the total inventory at the location.

Asset Attributes and Templates

Civic Platform uses attributes and templates effectively manage and track agency assets, structures, and establishments.

Attributes define item characteristics, such as condition, length, color, life expectancy, and value. You can create custom attributes in addition to the attributes provided for standard asset, structure, or establishment records.

You can create a collection of attributes in an attribute table, associate one or more attribute tables with a template and associate the template with specific asset, structure, or establishment types so that all instances of the same type provide the same set of attributes. You can define as many attributes and attribute tables as required and use each one in several different templates. You can associate any template with multiple asset, structure, or establishment types.

Example Use Case

You define values for the following attributes; engine type, unit size, model number, manufacturer, serial number, condition, diameter, hydrant type, pipe size, and water pressure zone. You use some of these attributes in several different templates and you do not use the more specialized attributes in a template.

For the vehicle template, you use model number with engine type, condition, manufacturer, and other attributes. For the fire hydrant template, you also use model number with diameter, hydrant type, pipe size, and water pressure zone. You use the condition attribute in templates for vehicles, hydrants, and residential/commercial structures. After you create the templates, you associate them with asset, structure, and establishment types. You associate the vehicle template to the truck, van, and plow vehicle types.

Example Use Case

You create one template for plumbing and sewage fittings, with attributes like diameter, length, and material, and attach this template to the drainage pipe asset type and sewage asset type. You create another template for shopping malls. You use the same material attribute that you used for plumbing and sewage fittings, in addition to the cuisine, capacity, and number of employees attributes. You associate this template to the restaurant establishment type and snack bar establishment type.

Understanding Licensing and Case Management

A license provides proof of legal permission to work in a profession (inspector), own something (a firearm), or do something (drive a car or fish). A license typically consists of a piece of paper, a tag, or plate that the license issuing authority signs or stamps to indicate license legitimacy and license currency.

Many professional fields, such as engineering, medicine, and education, require that individuals obtain a specific level of education to become a licensed practitioner. Many of these occupations require licensed practitioners to receive regular continuing education, with acceptable scores on certification level exams, to maintain their certification.

Example Use Case

To perform work, an electrician needs an electrical license and a refrigerator repair man needs a mechanical license. A pharmacist must have a license to dispense medications with the additional requirement of continuing education to keep the license current. A business owner must have an operating license, and everyone who drives needs a drivers license.

Civic Platform provides the ability to define relationships between record types and license types so that Civic Platform can track and manage tasks related to issuing licenses. These tasks include creating new license applications, renewing existing licenses, editing application specific or contact information, associating reports and documents to a license, checking the workflow and condition history, and viewing parcel and address information. In addition, Civic Platform can invoice fees, accept payment and check payment history. Civic Platform provides agencies with the ability to track the education, continuing education, and examination requirements related to professional or occupational licensing and renewal.

If your agency implements Citizen Access, you can extend the licensing process to public users online. With Citizen Access or Civic Platform, you can initiate a license renewal, pay the fees associated with the license renewal, and complete the transaction for the license owner. This entire process can occur within the agency, online, or a combination of both.

Example Use Case

A public user starts their business license renewal process by completing an application online. The public user visits the agency to provide supporting documents, pay the fees, and complete the transaction. Conversely, a customer comes into the agency to start the renewal process. Then, the public user returns home or to their business office to upload supporting documentation, attach the supporting documents to their application, pay the fees online, and complete the transaction.

Topics

- Examinations
- Examinations, Education, and Reference Contact Information

Expired Licenses and Insurance Coverage Verification

Agencies can use Civic Platform to set permissions on application types based on license or insurance status. This feature extends to Citizen Access so you can limit the availability of certain application types online to applicants. When you define permissions for application types based on a license or insurance status, you enable only the individuals or companies with a current license and proper insurance coverage the capability to view certain information and proceed with the application process.

Your agency can provide a service to remind stakeholders to keep the licenses current or maintain proper insurance coverage by sending email reminders to individuals or companies requiring license or insurance renewal. If your agency implements Citizen Access, the email notifications function together with the expiration notifications for licenses or insurance that occur after logging in.

Record Type and License Type Expiration Settings

You can configure Civic Platform to verify the status of a license type against a record type so that administrators can control permissions to information or to an application. This is particularly useful when a licensed professional has a license, business license, or insurance coverage that expired.

Example Use Case

In the State of New York, general contractors and home improvement contractors require a home improvement license (HIC) and proper insurance coverage. Insurance includes liability, worker's compensation, and disability. Agencies in the State of New York define a relationship between the building permits, insurance, and license type status so that only contractors with a current license and proper insurance coverage have access to building permits.

Provider Records

Civic Platform manages authorized lists of providers that provide services in satisfaction of requirements for education, continuing education, and examinations. Providers offer professional educational degrees, continuing education, or certification examinations. These offerings take many forms, including accredited colleges, universities, trade schools, professional development conferences, workshops; trade journals, state agencies, local agencies, and so forth.

Education

Education requirements for a particular profession varies across industries. Strict degree requirements apply to some highly specialized professions, such as nurses or lawyers. Degree requirements for other professionals may be common to multiple career paths, such as for teachers or those in the engineering trades.

Civic Platform provides agencies with a convenient method of collecting and tracking educational credentials, including degree, program of study, and educational institution. Civic Platform associates those credentials with the corresponding professional license. Associating an education record with the record types to which it applies allows you keep track of both the specialized and the general education degrees obtained by licensed professionals.

Continuing Education

Many professionals, such as doctors, teachers, architects, and electricians, require regular continuing education to maintain their professional or occupational licenses. Requirements vary widely across professions, but typically include completion of a specified number of continuing education units.

Acceptable units may include specific courses, a certain number of private or informal study hours, practical work hours within a given period, and so forth. The applicable licensing board or agency sets the requirements.

Civic Platform allows your agency to track continuing education requirements and progress toward their completion. You can associate license types with continuing education requirements and tie the renewal process to a workflow.

Examinations

Many programs rely on certification level exams to demonstrate a practitioner's level of competence. Lawyers must pass their state bar exam, nurses must pass the nursing level exam for their accreditation, such as RN or LPN. Other occupations may demand acceptable scores on periodic recertification examinations as part of the license renewal requirements.

Civic Platform allows your agency to receive exam scores directly from the testing provider, record those scores, and apply them to the requirements for licensed professionals who seek to obtain or renew their professional licenses. You can associate examination requirements with the license type tie it to a workflow tasks.

Examinations, Education, and Reference Contact Information

When citizens file applications online to obtain a new license or renew a license, they typically need to provide information about education, continuing education, and/or examinations that are requisite to obtaining a license.

After a Civic Platform user approves newly-entered and approved education, continuing education, and/or examinations data, the new data becomes part of the contact reference record (provided it has passing scores) so that it is available each time an individual files a new application. Registered users do not need to re-enter the information each time they apply for and renew a license because Civic Platform now pulls the education, continuing education, and/or examination data from the contact reference record. Before this enhancement, users had to enter this data for each new application or renewal, and Civic Platform stored the data as part of each application record.

A public user can now enter education, continuing education, and/or examination data as part of the application process and have that data become a part of his user account data. He can also enter this data apart from the application process. After the public user submits the data, it synchronizes with Civic Platform, where an authorized Civic Platform user can review and approve the education, continuing education, and/or examination records. This approval ‘validates’ the education, continuing education, and/or exam records and this validation syncs back to the public user’s account, where it is available for future applications.

After an agency accepts an application or approves the education, continuing education, and/or examination submittals, the education, continuing education, and/or examination records become read-only because the data is a part of an existing application record.

Civic Platform users may also enter education, continuing education, and/or examination data via Civic Platform. After an authorized Civic Platform user approves the data, it synchronizes with the public user’s account on Citizen Access.

You can view and work with education, continuing education, and/or examination data via the Education, Continuing Education, and Examination tabs on the record detail portlet or via the Education, Continuing Education, and Examination tabs on the contact reference detail portlet.

Understanding Service Requests

A service request is a request within an agency to perform a task or service for its citizens and employees. A service request can be any request by a person for any type action for which the agency is responsible.

Example Use Case

- A citizen calls about potholes in need of repair.
- An agency inspector approves the plumbing on a new building and he requests that the agency turn on the water for the building.

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

Common Services

Automation provides many common services for handling records.

Related Links

Understanding Reporting
Understanding SmartCharts
Understanding Audit Logs
Understanding Permissions
Understanding Calendars
Understanding Information Access
Understanding Communications
Understanding Conditions
Understanding Contacts
Understanding Accounting
Understanding Activity Specific Information Groups
Understanding Batch Processing

Understanding Reporting

Civic Platform provides a reporting function that interfaces with the following third party reporting engines:

- Accela Report Writer
- Crystal Reports
- Microsoft Reporting
- Oracle Reports.

You use the Civic Platform Report Manager to set up the reporting tools, and to categorize, configure and maintain reports. Report setup options include setting report parameters to send to the integrated report server, assigning permissions, attaching reports to portlets, and associating reports with workflow tasks.

When executing reports, Civic Platform sends the report request, with report parameters, to the integrated report server. The report server connects to the Civic Platform database, composes the report, and delivers the request back to Civic Platform in a pre-defined format.

Accela-hosted sites do not need to set up and configure integrated report servers. On-premise sites require configuration and setup of integrated report servers (see Civic Platform On-premise Administrator Supplement).

The integrated report servers store all reports, accessed by Report Manager, in a specified directory. Permissions on these directories enforce report security. You can also save reports to an integrated Enterprise Document Management System (EDMS).

Users can view reports, from different report servers, in the same portlet or from the same menu. Multiple agencies can use the same reporting service, from different environments, as long as you have network access to the report services and report directories.

You can configure a report to use client-side executables (.EXE) from a user's workstation. For example, you can define a Microsoft Excel file with variables that launch a report within Civic Platform. The Client_EXE report service option is only compatible with Microsoft Work (.doc) and Microsoft Excel (.xls).

Each reporting service provides options to present reports in different formats including Adobe Acrobat (.PDF), Microsoft Word (.doc), and Microsoft Excel (.xls). For example, Crystal Reports provides Adobe Acrobat (PDF), MS Word (.doc), MS Excel (.xls), Rich Text Format (.rtf) and Comma-Delimited (CSV) output formatting options. You use Report Manager to specify the format for a particular report service.

Understanding SmartCharts

SmartCharts provide graphical representations of queried data that enable managers to filter and review specific items, such as new permits this quarter or the number of permits on hold this month in comparison to each of the previous six months. You can restrict SmartChart access to individual users or user groups.

You can create the following types of SmartCharts (SmartCharts):

- Column bar chart. Plots two sets of data values. The set of data values shown on the y axis must be numeric. The set of data values on the x axis can be numeric or alphanumeric.
- Line chart. Plots two sets of data values. The set of data values shown on the y axis must be numeric. The set of data values on the x axis can be numeric or alphanumeric.
- Pie chart. Plots two sets of data values. The y values determine the percentage each chart section occupies. The x values determine the labels for the sections.
- Odometer chart. Plots a single set of data values for which you want to maintain a count.
- Speedometer chart. Plots a single set of data values on a speedometer. You define ranges (Start, Warning, Critical, and End).

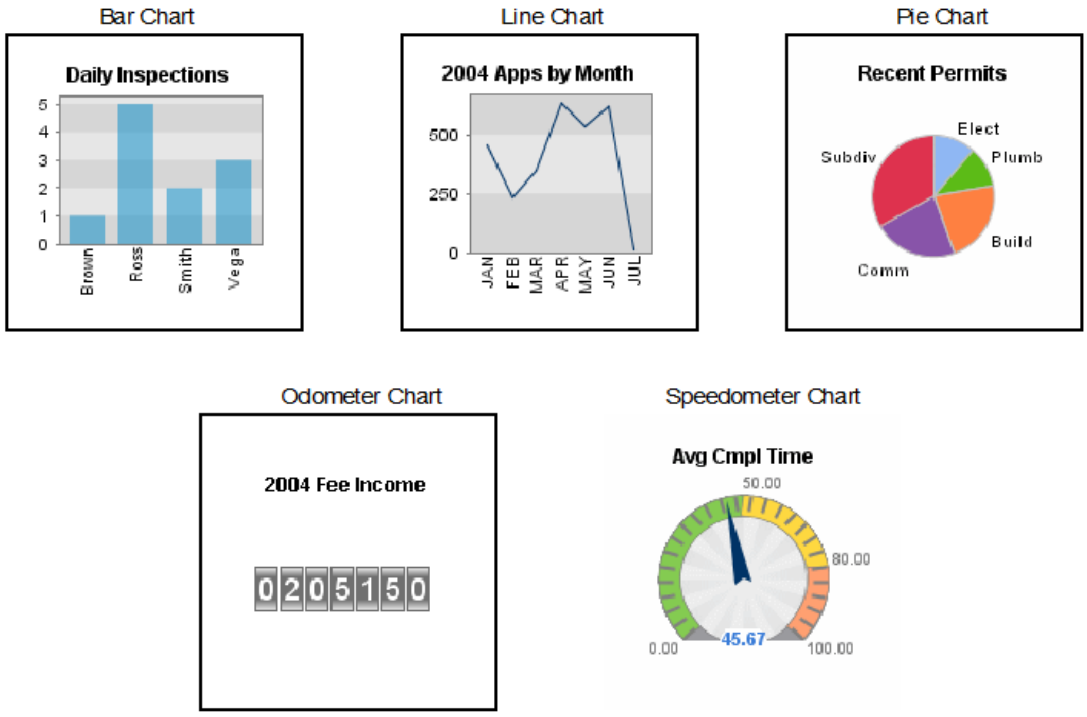


Figure 39: SmartCharts

Understanding Audit Logs

Audit log functionality can be enabled for many different types of data that you work with every day. Audit logs are useful because they enhance an agency's ability to track changes made within the system and hold those making the changes accountable for the actions they take.

Audit logs give you the ability to review historical data for records and entities. For example, when a new record is created, the first entry in each field is recorded and saved in the audit log. Essentially any action to add, update, or delete data from a record s recorded in the audit log.

Agencies can elect which audit logs to turn on and which users have access to the historical data contained within the audit logs. A number of filters are available that you can use to refine the data that displays.

Example Use Case

An agency wants to enable an audit log for inspection details. You turn on the FID that controls the ability to access the inspection log for the user group that needs to interact with this log, and you enable the Inspection audit log for the agency. You use the Audit Log administration portlet to configure which fields to display for inspection audit log. You elect to display the date and time of the modification, the user who modified the inspection, the inspection type, the inspection status, and the entity ID number. After you set up an inspection detail audit log, authorized agency users access the log to assess who modified the status of an inspection and when.

You can audit the following types of activities:

- Conditions
  - Record conditions - track condition activities for records, workflows, and inspections
  - Contact conditions
  - Reference conditions - track condition activities for reference components, such as address, parcel, owner, licensed professional, contact, or structure
  - Standard conditions - track activities by administrators on conditions
- Documents
- Contacts
  - Contact address
  - Contact also known as
  - Contact merge
  - Contact relationship
- Checklists
- Inspections
- Record status history
- Examinations
- Record activities
- Deleted records

- App Specific Info and App Specific Info Tables activities
- Deleted workflow history

Understanding Permissions

Civic Platform provides three levels of access (Full, Read Only, None) to Civic Platform objects and functions. Full access enables modification, Read Only enables viewing, and None provides no access. Civic Platform enforces access control on many different objects and functions, including workflow status, application types, inspections, calendars, FIDs, and so forth.

Civic Platform manages access permissions for modules, groups, and individual users. Unless you define specific access permissions at the group or individual user level, groups and users inherit access permissions from their parent module. You can set access permissions differently for the module to which a group belongs, the group to which an individual user belongs, and the individual user.

When access permissions differ between the module, group, and individual user, the access assigned at the most specific level applies. For example, if an individual user has Read access and the group to which they belong has Full access, Civic Platform enforces Read access.

Access Determination for Civic Platform illustrates how Civic Platform might determine access when multiple security policies apply to a situation.

Table 3: Access Determination for Civic Platform

User Group	Workflow	Appl. Type	FID	User Access
Full	Full	Full	Full	Full
Read	Full	None	Read	None
Full	Read	Full	Read	Read
None	Full	Full	Read	None
Full	Read	Read	Full	Read

Civic Platform enables agencies to define up to four levels of user groups, each with their own access permissions. In addition, you can set access permissions at any of the four levels of record type structure. The best practice provides the most access at the highest level needed, then limits access at more specific levels, as required.

To set the permissions for a Civic Platform object, you associate the module, group, or individual user to the object of concern. For example, Specifying Permissions for Civic Platform Objects shows how you associate the permissions of a module, group, or individual user to an event calendar.

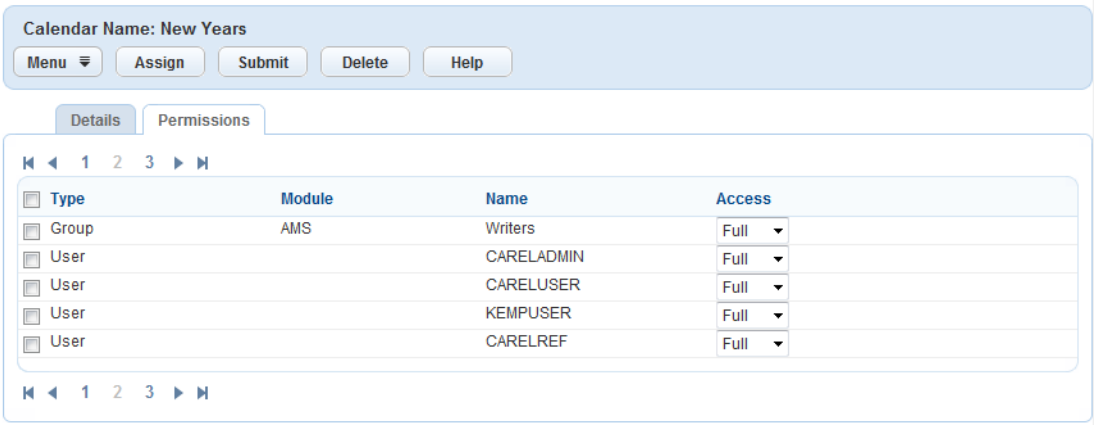


Figure 40: Specifying Permissions for Civic Platform Objects

To set access to Civic Platform functions (FIDs), you set the module or group access permission on a listing of approximately 600 FIDs (Specifying Permissions for Civic Platform Functions). The *Civic Platform Configuration Reference* provides a reference for the FIDs.

Figure 41: Specifying Permissions for Civic Platform Functions

Understanding Task Types

Accela provides multiple paths to access five common task types.

- inspections
- meetings
- activities
- workflow tasks
- document review tasks.

You can access, then operate on, instances of these task types through tabs in the My Tasks portlet (My Tasks Portlet), tabs in the record details portlet (Record Details Portlet), or the list of tasks in the Task Management portlet (Task Management Portlet).

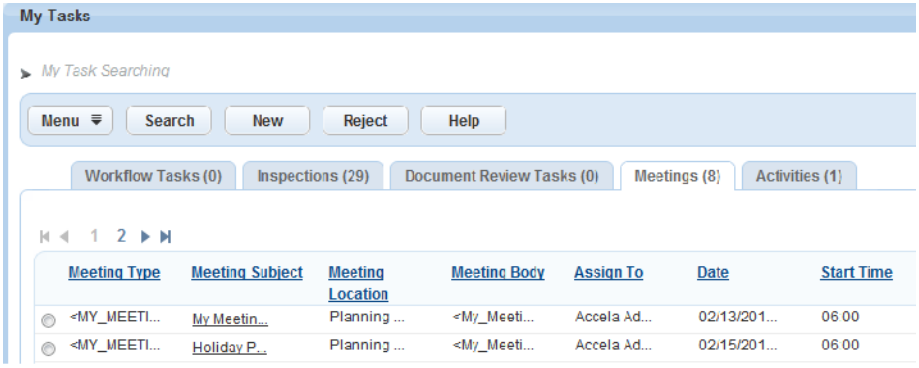


Figure 42: My Tasks Portlet

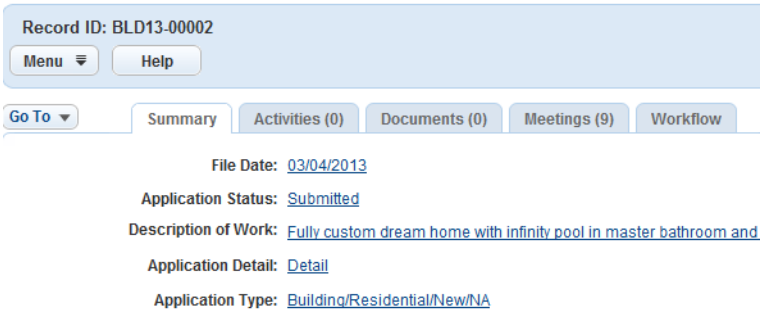


Figure 43: Record Details Portlet

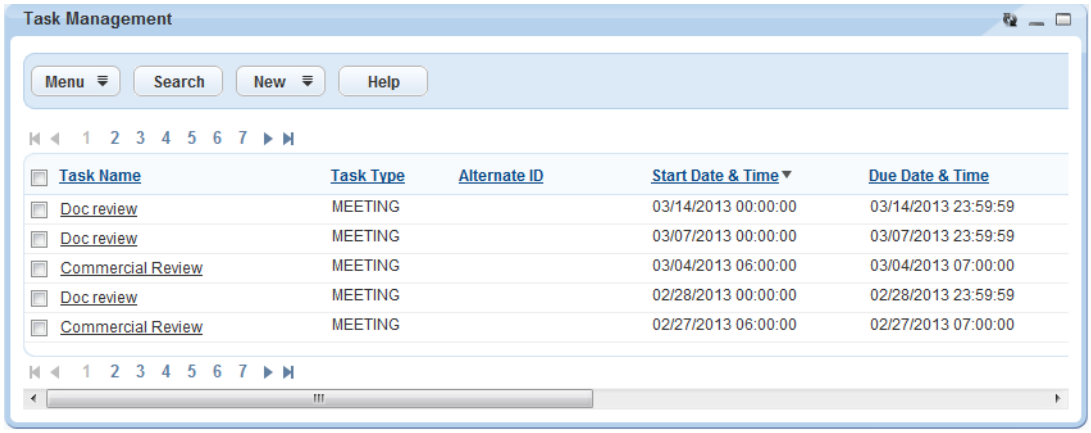


Figure 44: Task Management Portlet

Understanding Information Access

Topics

Search

Civic Platform provides users with global search and portlet-specific search feature to locate records and objects throughout the Civic Platform database.

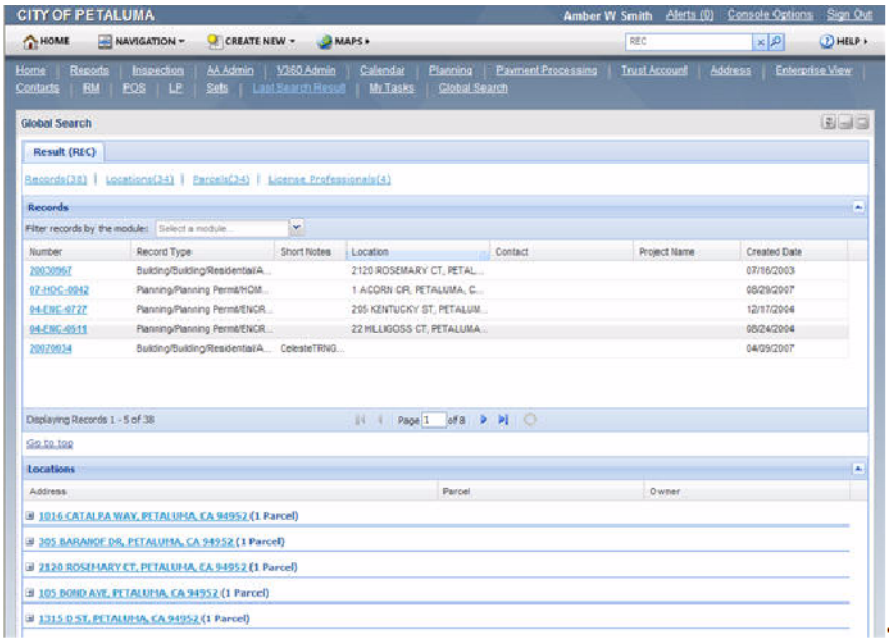
In the global search, you specify search criteria and you view the records that meet the criteria in a global scope. The global search checks in the following portlets for records that contain a field with the same value as entered in the global search field.

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

- Documents
- Contacts

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

Civic Platform displays global search results, grouped by type, in the Global Search portlet.



You can further organize the search results by applying filters to the results set. In the search result, you can click any record link to view or edit the record. You can also click an object link to view or edit object details.

Performing a Portlet Search

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

When you perform a portlet-based search, you can enter several different search criteria to help you locate the record or object you need. You can use wildcard characters in portlet searches.

Using Wildcards

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

Where you place the wildcard character determines which part of the name or phrase you are not searching for.

Example Use Case

You are searching for an owner with the last name equal or similar to Johnson. You enter *%son* as the search criterion. The search result includes all names it finds ending in “son,” including Johnson and Thompson. If you enter *john%*, the search results includes all names beginning with “John,” including Johnson, Johnston, and Johns. If you enter %john% and click search, the results include all names with “john” anywhere within the whole name, including Johnson, or St. Johns.

Advanced Search

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

- If you base a search on two or more detail search fields, Civic Platform uses AND to locate that contain all the search criteria. For example, if you pick two fields within the record detail search fields, the search applies this rule.
- If you base a search on fields across different categories, such as between record search fields and Address, Parcel, Owner (APO) template search fields, Civic Platform uses the AND rule to perform the search. For example, if you pick one record detail search fields and one search field from the APO template, the search applies this rule.
- If you base a search on two or more Task Spec Info, App Spec Info, or APO template search fields, Civic Platform uses AND to locate records that contain only one of the search criteria. For example, if you pick two fields within the APO template, the search applies this rule.
- If you base a search on two fields from the record detail search and the APO template, Civic Platform uses AND and OR to perform the search.

Data Filters

Data filters restrict data that displays in lists and forms. You define a data filter by specifying record metadata (field values) that you want the data filter to display. Civic Platform only displays those records whose data match the field values in the data filter. You can assign data filters to modules, groups, or users.

You can define data filters for all fields on a list or form. You can set up multiple data filters for a list or form, in which case you specify one of the data filters as the primary data filter. Civic Platform automatically applies the primary data filter to the corresponding list or form. You can create data filters to display multiple record types in the same list portlet.

QuickQueries

QuickQueries provide a second level of filtering, after data filters, to help users further refine access to information. QuickQueries work on record metadata that passes through data filters.

Civic Platform supports global QuickQueries and QuickQueries created by individual users. Administrators specify the modules, groups, or users that can access global QuickQueries. QuickQueries, to which a user has access, appear in the user's My QuickQueries drop-down list in the list portlet. When multiple QuickQueries appear in a user's My QuickQueries drop-down list, the user can select one of the QuickQueries as the default.

Individual users can set up multiple QuickQueries with one QuickQuery as the primary (default). Civic Platform runs the primary QuickQuery each time the user opens the containing list portlet.

Different users can assign a QuickQuery the same name. Civic Platform differentiates these QuickQueries by the user's login name.

Example Use Case

John Q. Smith and Ann Jensen both create a query called "Projects Due Today." A user or administrator who wants to create two QuickQueries with the same name on the same login account needs to differentiate the two. For example, "Opened Today with Balance (Global)" and "Opened Today with Balance (My QQ)."

QuickQuery Parameters provides parameters you can use parameters to build QuickQueries.

Table 4: QuickQuery Parameters

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 to which the query applies.
$$ORGANIZATION$$	All organizations. An Citizen Access term.
$$OWNORGANIZATION$$	The logged in user's organizations. An Citizen Access term.
$$OWNLICENSE$$	The logged in user's licenses. An Citizen Access term.
$$PUBLICUSER_EMAIL$$	The logged in user's email. An Citizen Access term.
$$SERV_PROV_CODE$$	The login user's agency code
$$TODAY+/-#$$	Today's date (using the workstation system date) or a range of days. For example, enter $$TODAY-7$$ as the value for the Inspection Date field to return all records with inspection dates in the past week. Similarly, you can use $$TODAY+7$$ to return records with inspection dates occurring in the week to come.
$$TODAY+n$$	Date range beginning with today's date.
$$USERID$$	The ID of the user currently logged on to Civic Platform.
$$USERFULLNAME$$	The logged in user's full name.

A relational operator defines the relationship between the field you select, and the value you want to compare that field against.

Example Use Case

You choose the City field and enter Portland as a value. You then pick a relational operator to specify the sought after data. Use = if you want records for Portland. Use != if you want all records except for Portland.

Default Relational Operators lists the default relational operators that Civic Platform provides.

Table 5: Default Relational Operators

=	Equal to
!=	Not equal to
<	Less than
<=	Less than or equal to
>	Greater than
>=	Greater than or equal to
LIKE	Contains part of the field value
IS NULL	Use to identify empty field values.
IS NOT NULL	Use to identify populated field values.
CONTAINS	Contains all of the field value

Understanding Communications

Topics

Standard Comments

Civic Platform associates comment groups with record types and makes all the comments in the associated group available to appropriate processes related to the record type. Comment groups consist of comment types and individual comments of a particular comment type.

Civic Platform provides standard comments for use when updating workflow tasks, entering inspection results, or placing a condition on an object. These standard comments comprise a list of pre-defined comments that improve comment consistency and speed of entry.

To make standard comments available for a particular form, you assign individual comments to a comment type, assign the comment types to a comment group, and associate the comment group with the appropriate record types. You can select the comment types included in a comment group, with the specific standard comments they contain, when you work on a form associated with the comment group.

Example Use Case

A user is completing an inspection form that has an assigned comment group; a data picker appears beside the Comments field. The user clicks this data picker to see a drop-down menu of standard comment types assigned to the inspection type. When the user clicks the hyperlink of the desired comment, Civic Platform enters the comment text in the Comments field of the inspection form.

Standard Comment Types

Comment types prescribe groups of related comments. You associate comment types with comment groups and assign comment groups to record types. You can then choose from all the comments types and comments contained in that comment group.

Example Use Case

You create two comment types, one for code enforcement and one for inspections. The code enforcement comment type includes the following two comments: “Overgrown vegetation,” “trash/junk/garbage and/or debris visible from public views and/or other properties,” and “mattresses visible from public view and/or other properties.” The inspection comment type includes the following two comments: “excavations abandoned or left in a state of partial completion and visible from public street,” and “construction materials and/or tools visible from public view and/or other properties.”

You assign the code enforcement comment type and inspection comment type to their respective comment groups and you associate these comment groups to the code enforcement record type and inspection record type. Users working with code enforcement records and inspection records use the appropriate preloaded comment to complete the comments field for the record.

Spell Checker

Civic Platform provides a spell checker to allow users to identify and correct the spelling for comments. The Spell Checker displays under all text area fields in Civic Platform and in the public user experience in Citizen Access.

Civic Platform provides a dictionary field for every language the Spell Checker supports, including United States and Australian English. The standard language is English. The dictionary used depends on the language selected when the user logs into Civic Platform. For example, if the user logs into Civic Platform with the AU English language, Civic Platform searches for words in the Australia English dictionary. If the

user logs in with an unsupported language and clicks the Check Spelling link, Civic Platform displays an alert stating that the Spell Checker does not support the language.

Administrators and users cannot modify the dictionary files by adding new words to the dictionary.

Alerts

Civic Platform allows you to create alert messages that communicate critical information throughout your entire agency. Civic Platform automatically generates these alerts upon completion of specified events.

You have the option to post alerts at the agency, module, department, user group, or individual user level so that each user sees only alerts that pertain to them.

You can set up rules that cause Civic Platform to send alerts upon satisfaction of certain conditions. For example, you might want to alert a manager when a workflow task status changes or if an item experiences no activity for a period of time. You decide the conditions you want to use as the basis of your rule and the type of system response.

Understanding Conditions

Civic Platform associates condition groups with record types and makes all conditions in the condition group available to the associated record type. Condition groups consist of condition types and individual conditions of a particular condition type.

Condition groups specify requirements that an application, or components of an application, must meet before approval. Standard conditions improve condition consistency and reporting.

Depending on the condition, condition violations result in one of the following:

- Lock. Prevents almost any operation, except operations that result in removal of the lock, from occurring.
- Hold. Restricts the addition of an activity and editing of components.
- Notice. Indicates special instructions to the person that completes the application. Civic Platform displays a message when you open the application or any component associated with the application. This condition does not impede record processing.
- Required. Indicates that you must complete a specified activity or field before proceeding to the next step in a workflow.

Example Use Case

To prevent issuance of a license or a permit when too many fees remain unpaid, a user locks an application.

Note:
Standard conditions specify the condition type and condition name. Users still determine the status, severity, and effective dates when they apply a condition.

With each type of condition, you can set up users or user groups that have privileges to view and change the status of the condition. You can set up the conditions users can associate with specific record types and have conditions automatically applied depending on record status.

Condition audit logs contain history details about condition creations and condition modifications.

Civic Platform provides the Condition Maintenance portlet for managing conditions (Conditions Administrator Portlet for Managing Conditions)

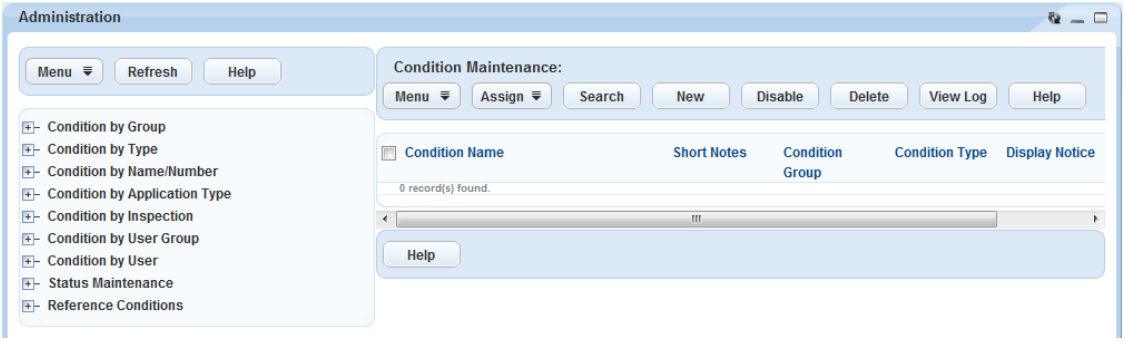


Figure 45: Conditions Administrator Portlet for Managing Conditions

Civic Platform uses two types of conditions: record level and record component level. Any condition that you place on a component, such as address, parcel, owner, licensed professional, contact, structure, establishment, or asset, affects any record that references the component. Record conditions affect the specific record.

You can specify standard condition security settings and condition type security for conditions. The more restrictive security setting takes precedence for any particular condition. For example, user-level permissions take precedence over user-group level permissions.

Administrators configure how to update reference conditions (for notice, hold, and lock conditions) on applicable records.

Topics

Condition Status

A condition status lets you determine when a condition takes affect. You can set up custom statuses to let a condition pass through different phases before applying the condition. For example, you can set up a “Researching” or “In Review” status for the initial research phase of a condition.

Statuses are useful when users know that they need to apply a condition, but they are not yet sure which severity level (lock, hold, notice, or required) applies to the condition. You can determine a severity level for the condition only when the condition reaches the “Applied” phase. Until the condition reaches this status, the condition cannot take effect to inhibit the necessary aspects of the application process.

Conditions of Approval

You can display a Conditions of Approval notice on properties. Civic Platform applies the Condition of Approval condition to records configured for this condition. Civic Platform displays the Condition of Approval notice in a variety of different Citizen Access pages and Civic Platform pages.

Understanding Contacts

You can set up custom templates or custom forms, to capture information about applicants, licensed professionals, and other important contacts involved in your business process. For example, you can set up a field where users can record the last four digits of their social security number for a certain contact. You can also use the standard fields, such as Name, Address, and Phone Number.

You can use EMSE to populate drop-down lists, for licensed professional templates exposed to public users, with values provided from an external web service (Understanding the Event Manager and Script Engine).

Topics

- Professionals
- Contacts

Professionals

Professionals are the licensed contractors, architects, engineers, and developers (CAED) recorded in your system. Civic Platform can import current CAED information from the state licensing board. As necessary, you can add new professionals to your database and you can edit information about existing professionals.

Contacts

As you manage applications and parcels on your system, you can keep track of certain individuals related to an application or a parcel. For example, you can keep track of the legal counsel for a property owner, or the accountant responsible for any fees assessed on a certain application.

You can record information about these individual people in the form of contacts. As necessary, you can add new contacts to your system, or update information about existing contacts. For example, you can change the mailing address for a contact.

Understanding Accounting

Topics

- Trust Accounts
- Point of Sale and Cashier Session
- Payment Processing
- Time Accounting Tracker

Trust Accounts

Agency customers can deposit money into a trust account that the customer can drawn from when they need to pay fees for an application. This is helpful for customers that have a large amount of work they regularly perform in your jurisdiction, such as contractors or developers.

Civic Platform allows you to set up trust accounts for address, parcels, licensed professionals and contacts. The trust account functionality allows you to establish and maintain trust account information, perform trust account transactions, and print trust account reports.

With the trust account feature, users can set one primary trust account and associate the trust account with one record or multiple records.

Civic Platform can send an email notification to the trust account manager when the trust account balance drops below a certain amount. For example, if the trust account has a $100 threshold amount and the trust account falls below $50, Civic Platform sends an e-mail notification to the trust account manager.

Administrators can assign one or more trust accounts as global to one or more modules, which makes the trust accounts available to all records within the specified module. This feature allows users to access a temporary trust accounts to process refunds.

Point of Sale and Cashier Session

Agency-hosted sites can accept point of sale payments and set up a cash drawer to print receipts. Civic Platform is compatible with the Epson TM U675 printer and electronic cash drawers. Civic Platform uses these hardware components to print receipts for payments and endorse checks.

Civic Platform allows agencies to process point of sale fee transactions for which no related record exists. For example, the sale of a cup or a baseball hat with your agency logo and agency name on it is a point of sale item.

All modules in Civic Platform support the point of sale feature.

Civic Platform automatically invoices point of sale fee items; users can only add and void fee items.

Payment Processing

Civic Platform handles in-house and online payment processing. Civic Platform allows agency cashiers to locate and apply payments within an individual record. Civic Platform can accept payments online in the form of credit cards and checks. For online payments, Civic Platform integrates with third part payment providers, such as PayPal Pro4.3 or Official Payments CoBrand+. Civic Platform and Citizen Access process payments for credit cards and electronic checks.

Time Accounting Tracker

Civic Platform provides the ability for employees to record the amount of time spent in performing their daily tasks, the descriptions and costs of materials used while performing those tasks, and the usage of vehicles related to the tasks performed.

Civic Platform captures time accounting information in two contexts; 1) time and materials, and 2) time related to a particular process or group of processes. As employees log their activity in the Time Accounting Tracker, the agency calculates fees and charges, and applies them to a record. Agencies can also record costs, for reporting purposes, not related to processing any specific information. The agency can define any number of time accounting types and assign an hourly rate or percentage adjustment to use to for each type.

Understanding Activity Specific Information Groups

Activity specific information groups and subgroups let users create unique agency-defined activities, in a defined sequence, related to a record. Agency administrators create the activity specific information groups and subgroups.

Example Use Case

An administrator defines the phone call activity specific group for the code enforcement group. The administrator then creates subgroups that contain information related to the phone call activity, such as date, notify, from, to, and reply by, and gives each of them a sequence number that determines the display order and information flow. When the code enforcement group users enter data from a citizen’s phone call, they follow the sequence of activities prescribed by the phone call activity subgroups. This sequence keeps the activity specific information data uniform and organized.

Understanding Batch Processing

Topics

Sets

Civic Platform can process sets of objects and individual objects the same way. For example, you can assign an owner to a set of parcels and Civic Platform simultaneously assigns the owner to each member of the parcel set, without having to set the owner individually for each parcel. You can assign:

- record sets
- parcel sets
- address sets
- licensed professional sets

You can batch assign comments, scripts, owners, licensed professionals, contacts, status, reports, and random audits to record sets.

You can batch assign scripts, owners, licensed professionals, and reports to parcel sets.

You can batch assign comments, scripts, and reports to address sets.

You can batch assign comments, scripts, and reports to licensed professional sets.

You can create records from parcel set members that satisfy specified condition or status values.

You can generate, print, and view reports for sets.

You can generate a set based on specified record parameters, then run reports or scripts against the generated set members.

You can use sets of sets functionality to group record sets and perform processes on all records in multiple sets. For example, you can simultaneously complete fee analysis and payment processing for multiple record sets.

Batch Jobs

The Civic Platform batch engine allows you to schedule, automatically execute, and regulate tasks on your software, such as asset GIS synchronization, preventative maintenance (PM), and work order generation. You can schedule these batch jobs to run once or at regular intervals. You can manually execute these batch jobs at any time without affecting their regular schedule.

Civic Platform supports a variety of batch jobs and some relate to asset management.

Example Use Case

The PM schedule batch job automatically generates work orders before scheduled preventative maintenance. The batch job generates all work orders associated with the PM schedule in a time you specify. You can schedule the batch job to correspond with the PM schedule so that Civic Platform generates work orders within the same time interval as the PM schedule. You can also schedule the batch job to run at a set time in advance of the PM schedule, so that the work orders are ready ahead of time.

Example Use Case

You can run a batch job to synchronize the Global Search Index with the database so the search feature performs smoothly and provides accurate and most up-to-date results. You can also run a batch job to collect expired license information and send email notifications to those associated with the license.

Another kind of batch job currently available is the asset GIS synchronization batch job. This batch job updates an asset type with any information entered for asset records of that asset type in GIS.

Example Use Case

An agency worker in the field is observing multiple hydrants over the course of a week. You can create a batch job that takes all information added to records of the type Hydrant and that runs each Friday afternoon. All information entered in GIS appears in the corresponding Accela Asset Management records. You can schedule this batch job to run at regular intervals so that information gathered in GIS is regularly and automatically incorporated into your regular asset records.

Functional Extensions

You can extend basic Automation functionality through the use of expressions and scripts.

Related Links

Understanding Expression Builder

Understanding the Event Manager and Script Engine

Understanding Expression Builder

Expression Builder (Expression Builder Portlet) enables you to define expressions that perform calculations, provide drop-down lists, or auto-populate data fields based on user-selected values. You can use these expressions to eliminate user calculation errors, data entry errors, and data entry work.

You can set data fields as required, read only, to accept certain values, as a message, or hidden. You can populate messages in one field, based on the value in another field or another portlet.

When defining expressions, you can also use the ASI Lookup Tables feature. These are tables that store the data that populate fields in the expression. You can add a record to an ASI table through an expression.

You can create expressions for Civic Platform, Citizen Access, or both. Citizen Access supports expressions for a variety of different form and portlets, including ASI, ASI Table, Contact, Fee, and Licensed Professionals.

Note:

Civic Platform uses the Event Manager and Scripting Engine (EMSE) to handle default form and portlet data fields.

You can use the Expression Builder wizard to create expressions. You can also create expressions with the Event Manager and Scripting Engine (EMSE) scripting language. When you create expressions with the Expression Builder wizard, Civic Platform generates the EMSE script for that expression. You can use Expression Builder to edit an expression. You can also use EMSE to edit expressions directly in the scripting language. You can extend the functionality of expressions, beyond the functionality provided through the Expression Builder wizard, by enhancing the EMSE expression scripts (Customizing an Expression Script).

Example Use Case

Common expression use cases include: expressions to support field validation in licensed professional, ASI, and ASIT components, expressions to leverage the quantity of fee items, expressions to execute by order, expressions to gather the sum of field values and update fields meeting the criteria of the expression, expressions on ASIT components with ability to insert a row to ASIT, expressions used to populate other sections in the application online with the ability to edit those sections in the review page.

Example Use Case

Sample use cases for expressions in Citizen Access include:

- validate fields in licensed professional, ASI, and ASI table components
- populate fields hidden from public users
- gather the sum of field values
- update fields that meet the criteria of an expression

- populate sections of the online application and make those sections editable in the review page.

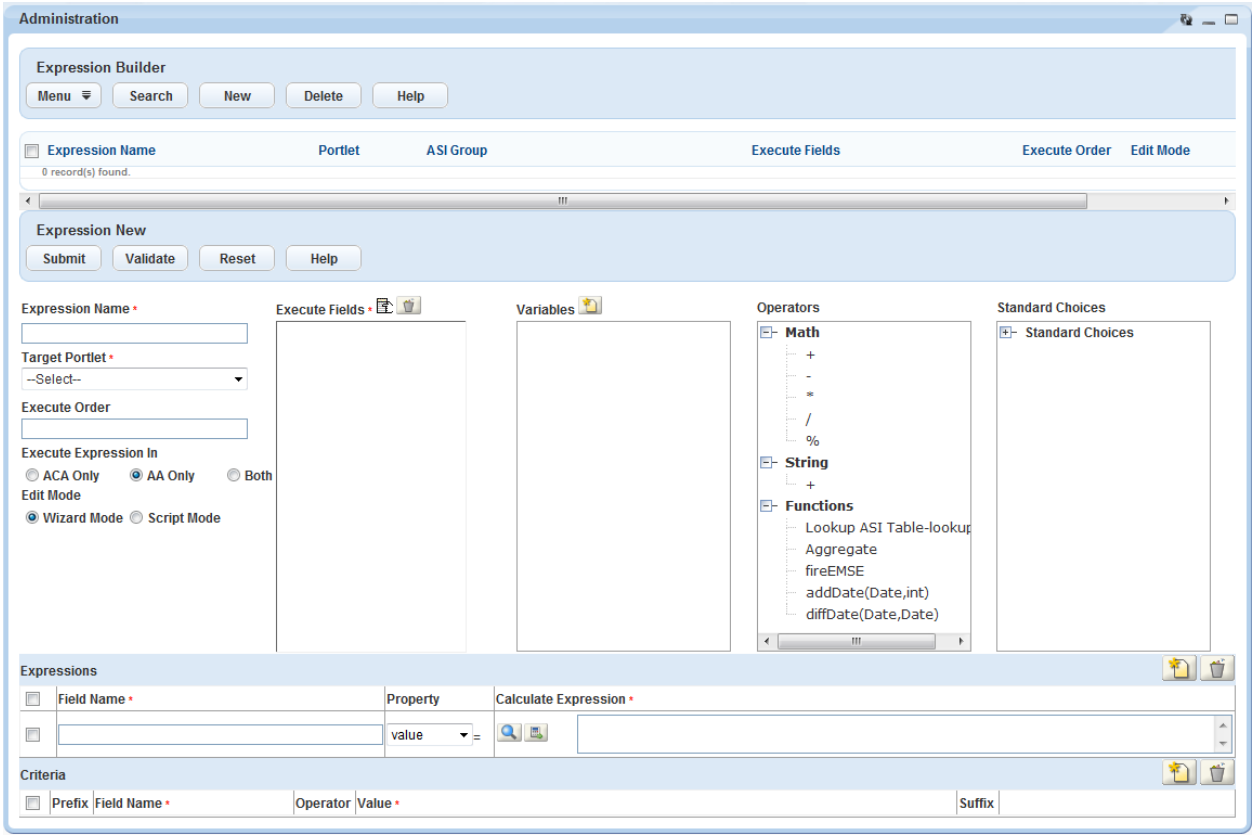


Figure 46: Expression Builder Portlet

Customizing an Expression Script

Civic Platform adds the ability to configure connections to external web services. When connected to an external web service, administrators can generate expressions that use data elements, from an external web service, as variables or data items. Civic Platform supports this feature for Citizen Access users.

Example Use Case

An agency administrator uses Expression Builder to build and execute an expression for the License Professional portlet. The EMSE script interacts with an external web service, such as the State Licensing Board, to check for the current status of a license and whether the Licensed Professional selected in a new application is valid.

Understanding the Event Manager and Script Engine

The Event Manager and Script Engine (EMSE) comprise two separate tools that work together to automate and simplify agency processes. The Event Manager identifies events, such as scheduling an inspection, and launches a related script. The Script Engine produces an effect based on the parameters that Event Manager passes to it and the design of the script used to process the event. You can use the Event Manager to make your system more efficient and perform a high level of customization on your system.

You associate the events with the script that you want to execute (Events and Their Associated Scripts).

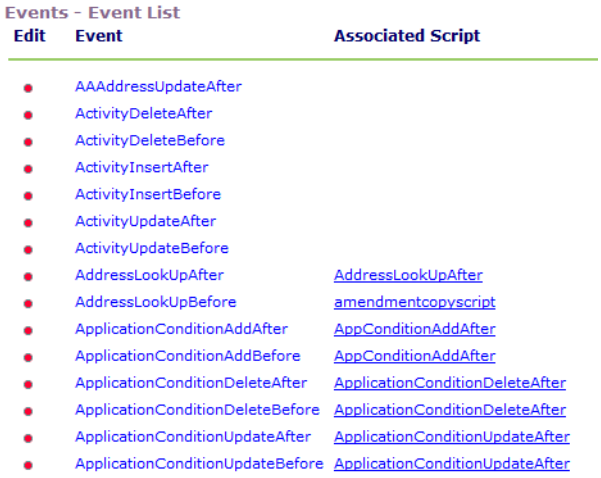


Figure 47: Events and Their Associated Scripts

Example Use Case

You want Civic Platform to automatically update the task status in an inspection workflow when you schedule an inspection.

Topics

- Understanding Events
- Understanding Scripts

Understanding Events

An action that a user performs through the Civic Platform UI, clicking the Submit button to create a new record for example, constitutes an event (Launching a Civic Platform Event). These events initiate some sort of reaction that may affect other parts of your system. For example, when you create a new record and save it, Civic Platform updates information on your system, as required.

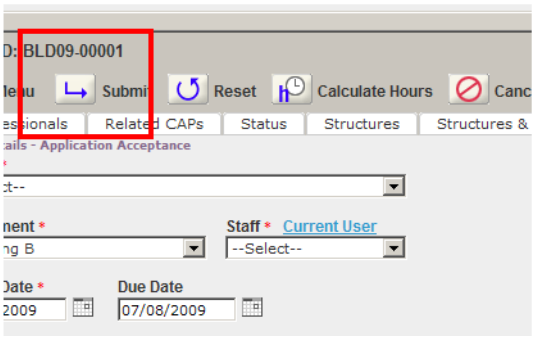


Figure 48: Launching a Civic Platform Event

Other possible events include finding a record, assessing a fee, scheduling an inspection, and so forth. Civic Platform provides 238 events with which you can associate scripts. You cannot create new events, but you can choose the events to set up for your agency and disable the events that you do not use.

You can trigger events from Civic Platform clients, such as Mobile Office, IVR, and Citizen Access, or from integrated third-party products.

Civic Platform provides before and after event types (Triggered event process flow).

Figure 49: Triggered event process flow

The before event occurs before you save any data to the database. Scripts associated with before event types validated data to ensure the process saves clean and accurate data to the database.

Example Use Case

- Check to ensure that the balance due for a record (permit or license, for example) is less than or equal to zero before issuance
- Check to ensure that all required inspections have passed, before scheduling a final inspection.
- Check to ensure submission of all required documents, before processing an application.

The after event occurs directly after the Civic Platform saves submitted data to the database. Scripts associated with an after event implement automation of an action for the user.

Example Use Case

- Assess and invoice standard fees or application dependent fees.
- Schedule an investigation inspection for the next business day after filing of a complaint.
- Email a PDF copy of a license, to the license holder, upon issuance or renewal.

Understanding Scripts

Civic Platform uses scripts to perform custom activities to extend standard event processing. When run, a script produces an effect on the objects defined in your system, such as records, parcels, addresses, and so forth.

Civic Platform provides a set of master script files that extend functionality for the 238 events. For some (56) events, Civic Platform provides a master script file unique to that event. For the other events, Civic Platform provides a universal master script.

Each master script file provides a variety of different functions you can invoke for an event. To determine the specific functions you want executed, you specify parameters in a standard choice script control. Each master script uses a comparably named standard script control to pass it parameters it needs to execute the specific functions for an event.

You can trigger a script from an event, a batch job, a set script or a script test. See Understanding Events for more information.

Note:

Civic Platform uses the Rhino open source JavaScript engine to convert master scripts into Java classes that Civic Platform can execute.

Topics

- Batch Jobs
- Set Scripts
- Script Test

Batch Jobs

Batch jobs trigger scripts through a scheduled job in contrast to a user-invoked action. For example, you can schedule a nightly batch job, with an associated script, that looks for expired permits or licenses and updates them to an expired application and/or expiration status. At a high level batch scripts contain instructions to query records based on a specified filter, evaluate each returned record and take action for each record according to certain criteria. Civic Platform provides the Batch Job portlet (Batch Jobs Portlet) from where you can use UI controls to set parameters for the associated batch job script.

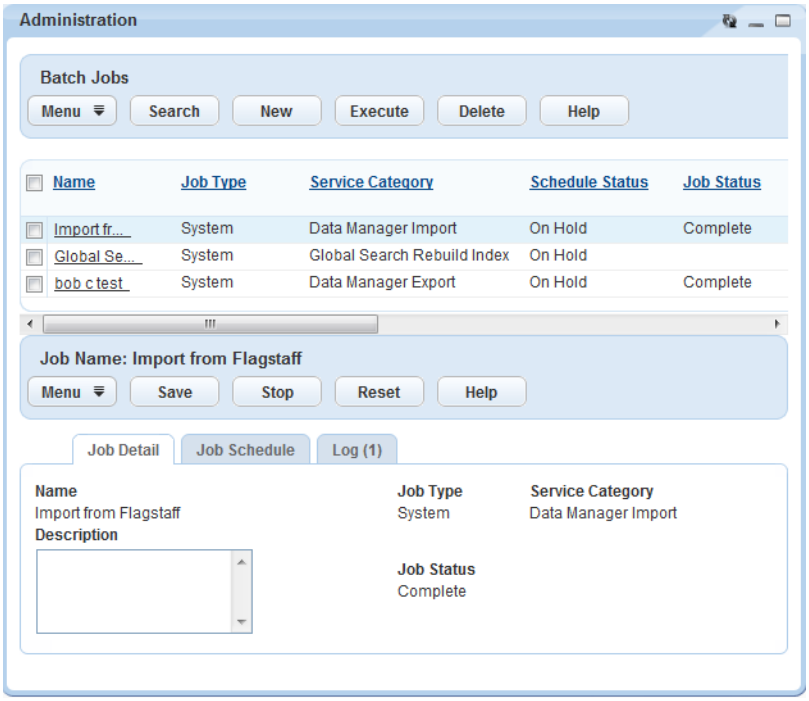


Figure 50: Batch Jobs Portlet

Set Scripts

You can associate a set script to the “Execute Script” button on the Set portlet (Set Portlet). The script contains instructions to evaluate each member (record) of the selected set and take action if the member falls into the specified criteria.

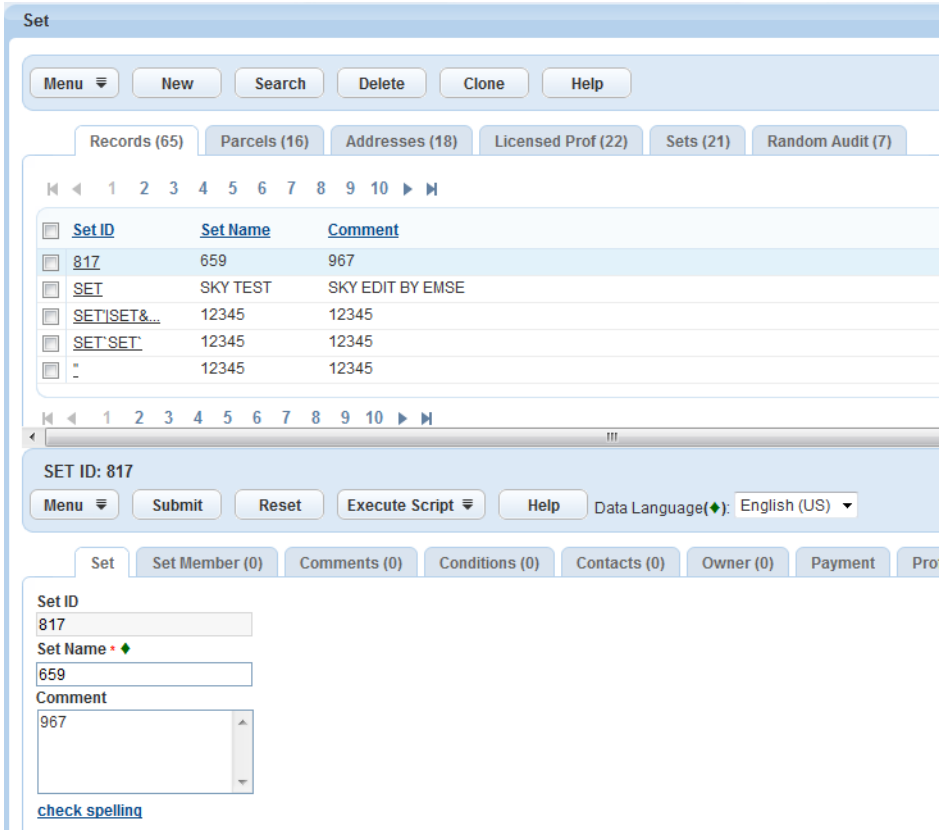


Figure 51: Set Portlet

Example Use Case

Manage an invoicing process.

- Run a batch script to evaluate records and determine if you require an invoice. If so, add the record to a set.
- Review the generated set for accuracy; add or remove records as required.
- Execute the script from the set portlet.
- The script evaluates each record; if it meets specified criteria take the appropriate action (eg. update the record, send an email or generate invoices reports).

Script Test

Civic Platform provides the Script Test tool for EMSE script writers. This tool enables you to enter and execute EMSE scripts with no affect on the Civic Platform database. The script writer can evaluate the output of the script to determine further development effort and testing. You can use the Script Test tool to:

- develop and test batch scripts
- develop and test custom functions
- troubleshoot and debug EMSE scripts.

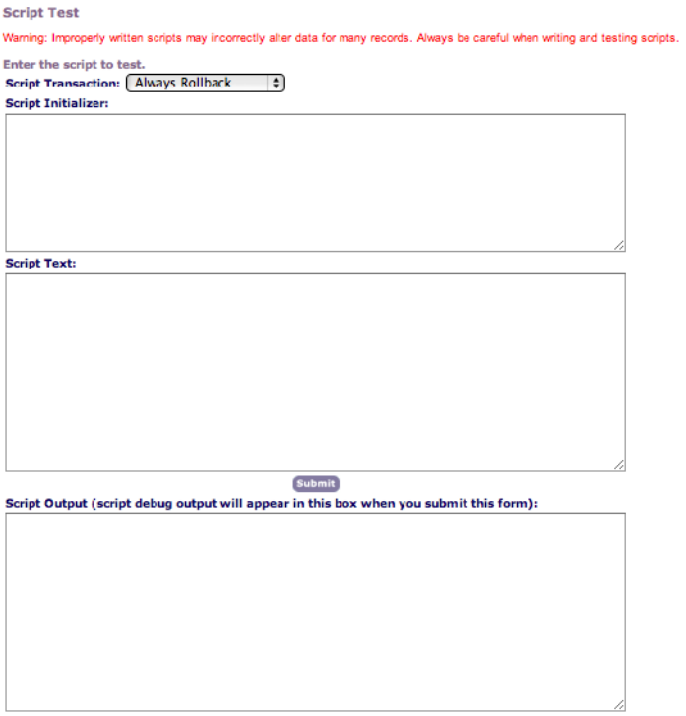


Figure 52: Script Test Tool

FIDs and Standard Choices

FIDs and Standard Choices provide the most readily available way to configure Automation.

Related Links

Understanding Function Identifications

Understanding Standard Choices

Understanding Function Identifications

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

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

Civic Platform exposes hundreds of FIDs to solution modules and to user groups, and a smaller set of FIDs to SuperAgency module user groups.

Civic Platform provides a single UI page interface for configuring the FIDs (Setting FIDs).

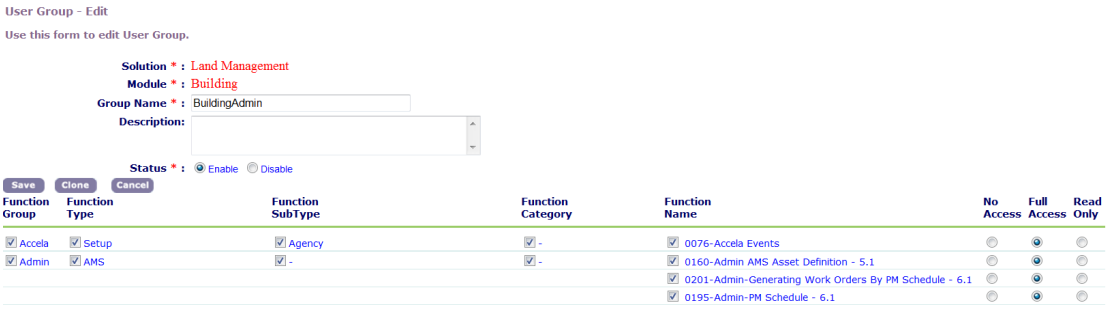


Figure 53: Setting FIDs

Civic Platform organizes the FIDs in a hierarchy as follows:

Function Group	The main level of FID categorization that consists of four headings: • **Agency**. Comprised of a single FID for configuring Accela events. • **Admin**. Addresses functionality associated with the Admin tab in the Civic Platform 'Classic' interfaces. Consists of features typically associated with administrators. • **Daily**. Addresses functionality associated with the Daily tab in the Civic Platform 'Classic' interfaces. Consists of features typically associated with end users. • **Reference**. Primarily addresses Address, Parcel, Owner (APO) functionality.
Function Type	A FID type categorization within each of the three main function groups (Admin, Daily, Reference)
Function Subtype	A FID subtype categorization within each function type
Function Category	A FID category within each function subtype
Function Name	The name of the FID

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

No Access	Deactivates the feature and makes the feature invisible to the selected user group.
Full Access	Grants the selected user group permission to perform all of the feature related activities.
Read Only	Allows the selected user group to view and to search information related to feature.

The *Civic Platform Configuration Reference* provides reference information about the FIDs.

Understanding Standard Choices

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

Standard Choices comprise a Standard Choice name, such as CONTACT_TYPE, along with Standard Choice Values and Value Descriptions. You specify Standard Choice Values and Value Descriptions to configure the operations controlled by the named Standard Choice (Standard Choice Configuration Screen).

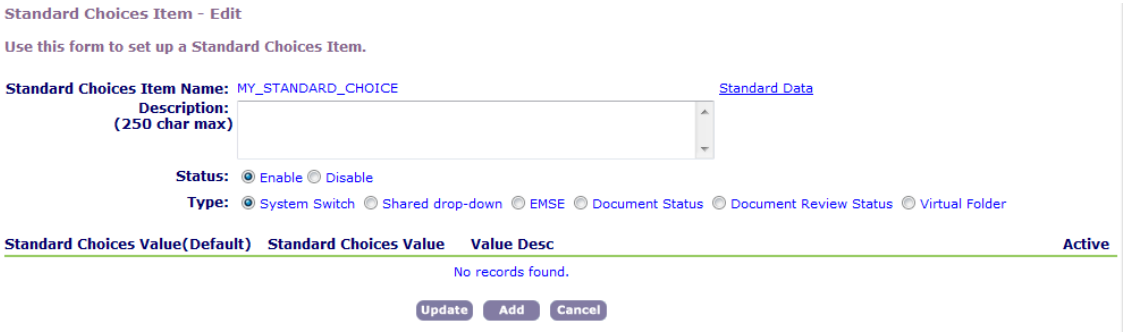


Figure 54: Standard Choice Configuration Screen

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

For some special Standard Choice, such as LICENSED PROFESSIONAL TYPE, you can associate an application specific information (ASI) group to each Value item. This is useful when, for example, a special professional field requires extra information. You can pre-define the extra information in the ASI group and associate the ASI group with the licensed professional type. When agency users create a license record of that licensed professional type, Civic Platform displays the extra fields from the associated ASI group.

Deployment and Migration

Automation supports a variety of different deployment topologies and ways to migrate content.

Related Links

Deployment Topologies

Migration

Deployment Topologies

A basic Civic Platform installation comprises the following software components:

- **Web server.**Civic Platform packages JBoss with Civic Platform components and deploys these to the web server. The web server receives instructions to construct and deliver web pages to a Civic Platform browser-based client, and provides information from the browser-based client to the application server for processing.
- **ColdFusion MX web server.**Civic Platform deploys the third-party tool ColdFusion MX to a web server. The ColdFusion MX web server provides the environment for the Civic Platform Classic administrative interface.
- **Application server.**Civic Platform packages JBoss with Civic Platform components and deploys these to the application server. The application server executes the main functionality of Civic Platform. The application server retrieves and writes record content to the database, and integrates with the web server to send and receive information to and from the client.
- **Database server.** The Civic Platform database (Oracle or SQL Server) stores all Civic Platform record content, except for attachments.

Your deployment can include the following optional components:

- **Index server.**The index server provides Civic Platform with the ability to perform global full-text searches across all Civic Platform records. Without the index server, Civic Platform can only perform exact match searches for record metadata within specified application types.
- **Accela Report Writer (ARW) server.**Generates reports of information stored in the Civic Platform database. ARW uses the same database as Civic Platform.
- **Accela Document Services (ADS) server.**Provides access to stored documents. ADS uses a different database instance tha Civic Platform and ARW.

Distributed deployment topology shows a distributed deployment topology, that includes the ColdFusion MX web server, optional index server, report server, and document server. The ADS server requires a database instance while the ARW server shares the Civic Platform database instance. You can consolidate these optional components on one or more physical (or virtual) hosts, depending on your deployment requirements. Distributed deployment topology shows the optional components on separate physical hosts for clarity only.

Note:

Add-on products use a different deployment topology for the client.

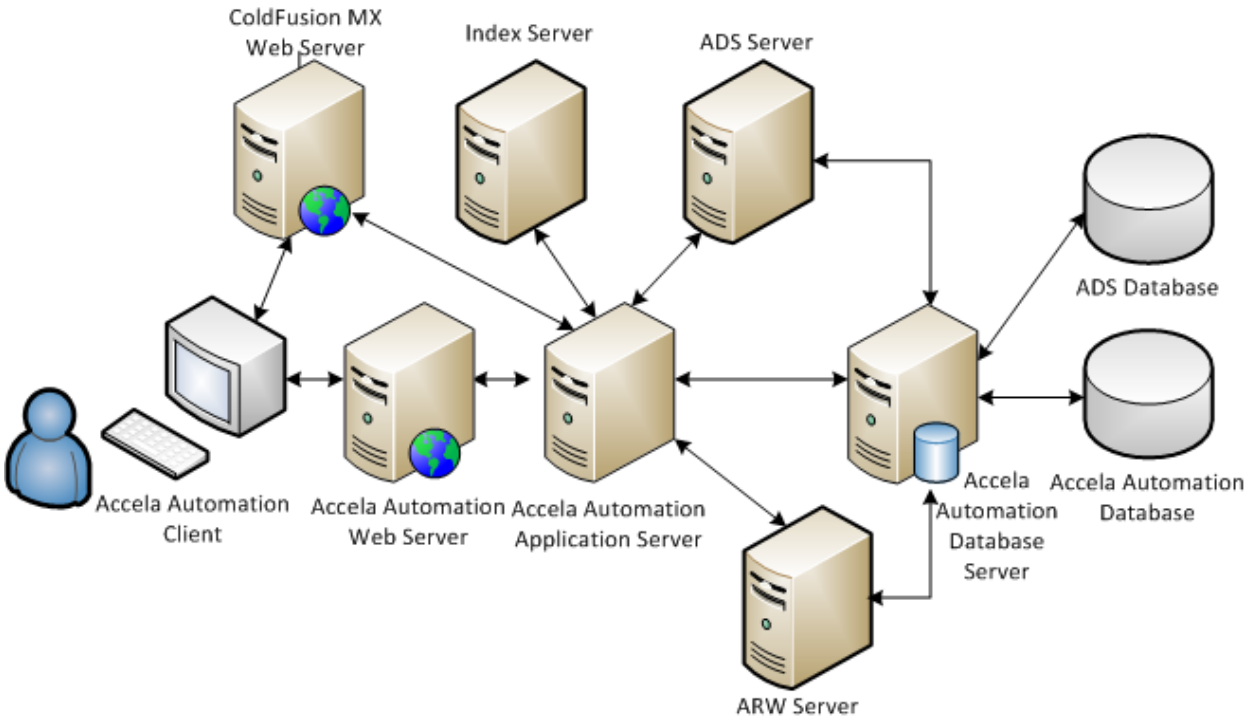


Figure 55: Distributed deployment topology

Migration

You migrate a Civic Platform deployment by moving information from a Civic Platform source database to a Civic Platform target database. To complete the migration, you set parameters specific to the new environment and reset certain Civic Platform operational parameters.

Civic Platform provides for migrating two types of database information; 1) configuration data and, 2) transaction data. Configuration data consists of two components; 1) information about the agency, module, record type and so forth (the Accela schema), and 2) information about the main console layout and the setup (the Jetspeed schema). Transaction data consists of (auditable) information Civic Platform generates on record type instances during their lifecycle from creation to destruction.

Note:

Agency configuration data equates to the

```
serv_prov_code
```

level of your implementation.

You can migrate all configuration data and transaction data or only configuration data. You can also migrate a selective subset of configuration data.

The approach you use to export data from the source database depends on your database (SQL Server or Oracle) and whether you want to migrate configuration data and transaction data, only configuration data, or only a subset of configuration data.

If you want to migrate all configuration data and transaction data, you perform a full backup of the source database and restore to the target database (export/import or data pump if you are using Oracle). If you only want to migrate configuration data, you run a script to export the database tables that contain the configuration data, and import those tables into the target database. If you only want to migrate a subset of configuration data, use the Data Manager tool (Data Manager).

Typical use cases for a database migration include the following:

- **Development to test and test to production**. In both these use cases, you typically migrate configuration data only. You can use Data Manager to make incremental configuration changes to the test environment or production environment without disrupting transaction data in your test environment or production environment.

  Note:

  The Data Manager tool only migrates record type configuration data. You cannot use Data Manager to migrate agency configuration data, module configuration data, or configuration data related to the main console layout (the Jetspeed schema).

- **Production to production environment**. In this use case, you migrate configuration data and transaction data.

Data Manager

Data Manager is a data migration tool for transferring data between Civic Platform agencies. You can first create an agency with core configuration data, and then apply the export tools and import tools of Data Manager to migrate the core configuration data to other agencies and other modules.

Data Manager supports the export and import of comprehensive data elements, specifically: all the record types and their associated elements; common settings in Civic Platform, Citizen Access, and Accela Asset Management; and reference licensed professional records.

When you migrate data, Data Manager maintains the integrity of database information, specifically sequences and key values.

Interfaces

Accela client products and third-party products integrate with Civic Platform through Accela's GovXML API, one of many provided web services, or a pre-built adapter. Accela's new mobile apps integrate to Civic Platform through the Accela Cloud Server and a mixture of GovXML APIs and RESTful service APIs. Accela's Event Manager Script Engine (EMSE) integrates with Accela Automaton through a custom API. Civic Platform Interfaces illustrates these interfaces.

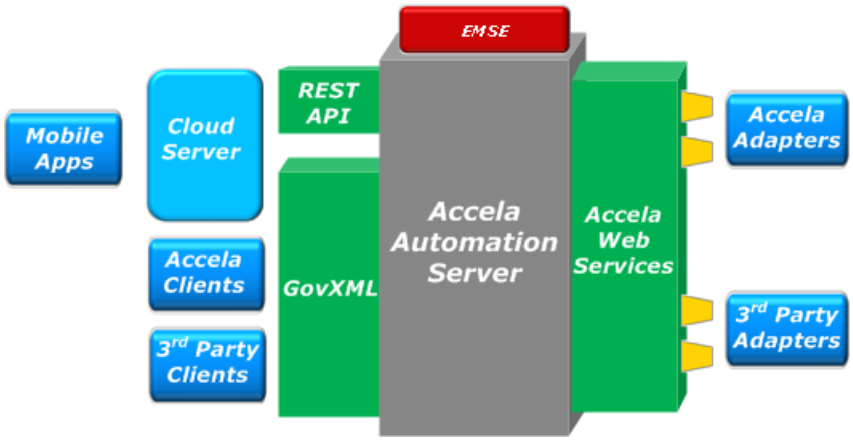


Figure 56: Civic Platform Interfaces

Related Links

Understanding GovXML

Understanding Web Services

Event Manager and Script Engine

Understanding GovXML

GovXML provides a standard Accela-proprietary interface between the Civic Platform server and Accela clients. Accela received a trademark for GovXML in 2002.

The GovXML API provides a robust set of functions that Accela clients can access to handle all agency information related to permitting, land (address, parcel, owner), workflow, inspection, spatial (map) data, compliance, and so forth.

GovXML uses an XML based request and response paradigm, and an HTTP based service, that communicates with the Civic Platform biz server. The following Accela clients interface with Civic Platform through GovXML:

- IVR
- GIS
- Mobile Office

The following Accela legacy products use GovXML:

- Kiva

- Tidemark
- Permits Plus
- Velocity Hall
- Accela Wireless

Understanding Web Services

Civic Platform provides web services to integrate Civic Platform with third-party systems. Accela external web services use a standard request/response web service architecture. Direct Integration and Translation Layer Integration show two common deployment architectures.

Best practice is to develop a web service that can directly respond to Accela's web service design (Direct Integration). This approach allows for faster transaction responses and tighter integration to the target data sources.

Third-party providers with existing web services can integrate through a "blackbox" translation service (Translation Layer Integration), which integrates and translates the Accela web service definition into the third-party provider's existing web service framework.

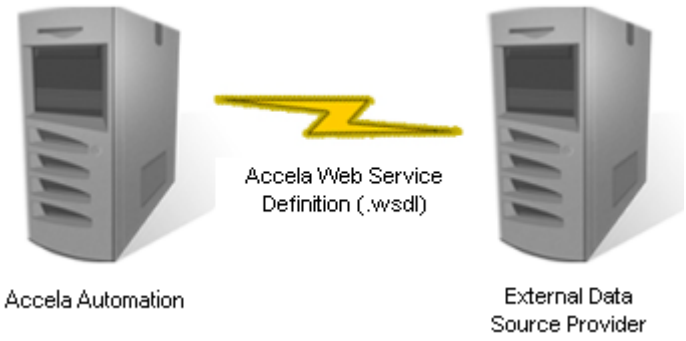


Figure 57: Direct Integration

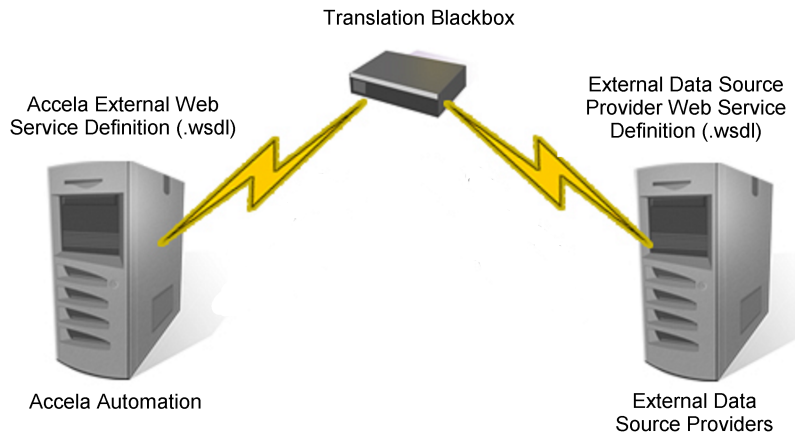


Figure 58: Translation Layer Integration

Topics

- External APO (XAPO) Web Service

- Epay Web Service
- EDMS Web Service
- Financial Web Services
- Asset Management Web Service
- Report Web Service
- Standard Choice Web Service
- Generic Query Web Service

External APO (XAPO) Web Service

Civic Platform can retrieve address, parcel, owner (APO) data from an internal or external database. By default, Civic Platform uses APO data from a database internal to the Civic Platform deployment. When you configure Civic Platform to use external APO data, the external APO database provides all the real-time APO data displayed in the Civic Platform UI.

Civic Platform supports integration with an GIS APO data store or other third-party APO data stores (Accela XAPO Web Service). Both integrations use the Accela XAPO web service. When integrating with an GIS APO data store, you use the ArcGIS web service as the prebuilt adapter. When integrating with other third party APO data stores, you must create your own custom adapter.

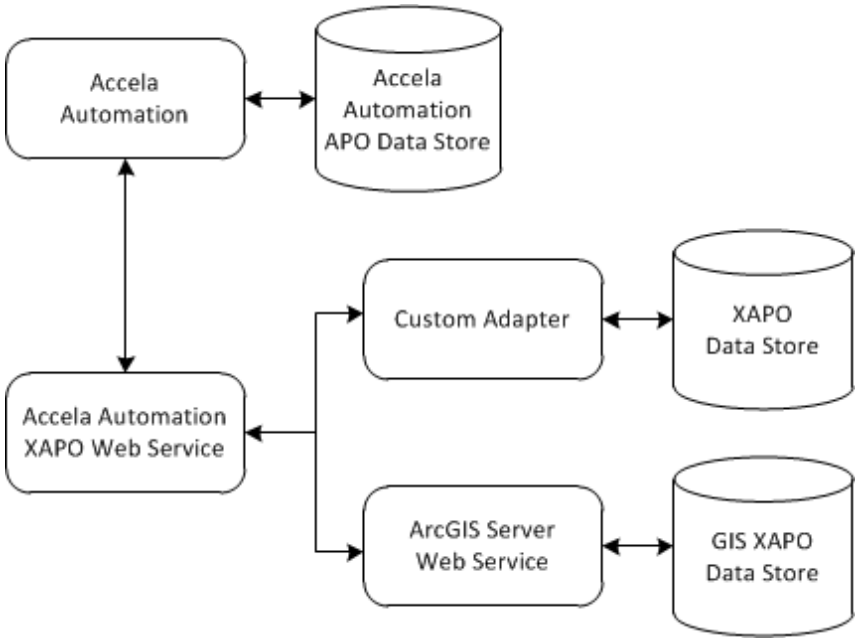


Figure 59: Accela XAPO Web Service

The Accela XAPO web service provides the following operations.

- `getAddressBySearchKeys`
- `getParcelBySearchKeys`
- `getOwnerBySearchKeys`
- `getExternalOwnerByAddress`
- `getExternalAddressByOwner`
- `getExternalParcelByOwner`
- `getExternalOwnerByParcel`
- `getExternalAddressByParcel`
- `getExternalParcelByAddress`
- `getAddressByMultipleModels`
- `getParcelByMultipleModels`
- `getOwnerByMultipleModels`
- `getParcelGenealogy`

Epay Web Service

Topics

- Epay Adapters

Accela provides the Accela Epay web service for agencies that need to create their own Epayment adapter. The Accela Epay web service provides a set of stubs and test harnesses to help you create your own custom Accela EPayments Gateway3 Adapter.

The Accela EPayments Gateway3 Adapter allows Civic Platform and Citizen Access to process payments through an online payment gateway.

The Accela Epay web service provides the following four operations.

- chargeCreditCard
- voidCreditCard
- chargeCheck

- voidCheck

The Civic Platform 7.1.0 EPayments SDK Guide.pdf provides instructions for implementing your own Epayment adapter.

Epay Adapters

Civic Platform and Citizen Access currently support the following third-party payment gateways:

- PayPal Payflow Pro 4.3
- Official Payments STP
- Virtual Merchant
- OPCoBrand+ (Citizen Access Only)
- Govolution (Citizen Access Only)
- First Data (Citizen Access Only)
- Etisalat (Citizen Access Only)

The Civic Platform 7.1.0 EPayments Configuration Guide.pdf provides instructions for configuring the Epay adapter to work with these third-party payment systems. You can use an existing Accela adapter or you can develop your own adapter (Interfacing with External Applications).

- EPayments Gateway Type 1 refers to EPayments Gateways that Civic Platform provides an adapter.
- EPayments Gateway Type 2 refers to EPayments Gateways that Agencies design, configure, and implement their own customized adapter.

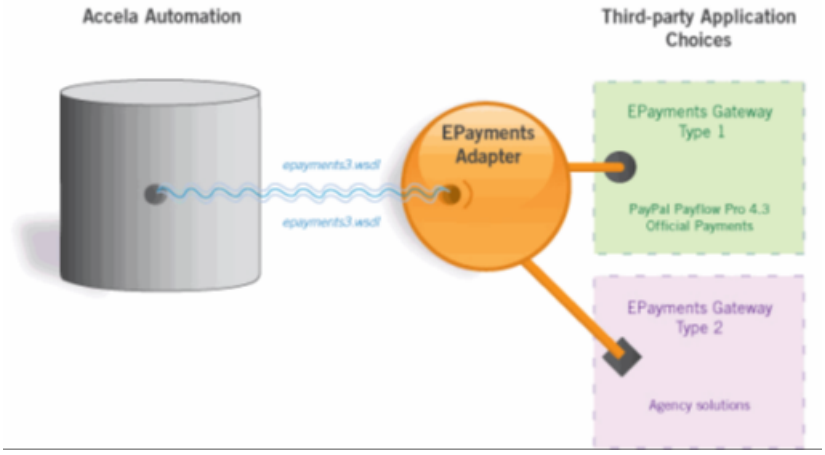


Figure 60: Interfacing with External Applications

EDMS Web Service

Topics

- Documentum Adapter

The Accela Enterprise Document Management System (EDMS) web service interfaces with third-party EDMS systems and Accela Document Services (ADS) for storage and retrieval of document attachments.

In addition to ADS, the EDMS web service supports integrations with Microsoft SharePoint®, Filenet®, Documentum®, SIRE®, and Laserfiche®.

Some of these providers generate a server or a provider component that matches Accela's EDMS web service, while others integrate using a "blackbox" approach (Translation Layer Integration).

The Accela EDMS web service provides the following four function requests and responses.

- Create. Sends the document from the user to the EDMS system in a BASE64 encrypted format to the EDMS system.
- Delete. Deletes the document the user specifies from the EDMS system.
- Update
- Get. Retrieves the document from the EDMS system and provides it to the user.
- List. Provides a list of documents to the user.
- listByMultipleEntity

Documentum Adapter

Civic Platform provides an adapter to use Documentum as the Electronic Document Management System (EDMS). When using the Documentum adapter, Civic Platform does not store information about documents, it queries the Documentum server through the EDMS Adapter to get lists of documents and to get the documents.

You can load documents into the Documentum server through Civic Platform or you can load documents directly in the Documentum server. Civic Platform can access documents loaded directly into the Documentum server if users maintain configured folders and file formats. You ca Civic Platform or Documentum to apply document security.

Financial Web Services

Civic Platform provides a set of web services to interface with third-party systems, such as Citizen Access and Master Address Repository (MAR). Civic Platform provides a Web Service Descriptor Language (WSDL) for each of the following financial services.

- FEE VALUATION SERVICE
- TRUST ACCOUNT SERVICE
- GOVXML SERVICE
- CASHIER AUDIT SERVICE
- CASHIER SERVICE
- INVOICE SERVICE
- CAP SERVICE
- FEE SERVICE

Asset Management Web Service

Civic Platform provides web services for the following asset management functions:

- Asset Usage Web Service. Creates, updates, and deletes asset usage information.
- Asset Web Service. Creates and updates asset information.
- Part Transaction Web Service. Creates and voids a part transaction information.
- Cost Item Web Service. Creates, edits, and deletes cost item information.
- Costing Web Service. Creates, updates and deletes costing information.
- Cap Web Service. Creates and updates record information.

Report Web Service

The Civic Platform Report web service provides the following method to access and print reports that are already defined in Report Manager.

- HandleReport

Standard Choice Web Service

The Civic Platform Standard Choice web service provides the following four function requests and responses for creating, editing or deleting Standard Choices.

- createBizDomain. Creates Standard Choices and configures Standard Choice Values.
- editBizDomain. Edits the existing Standard Choice Values.
- deleteBizDomain. Deletes the Standard Choice the user specifies, and the Standard Choice values.
- deleteBizDomainValue. Deletes the Standard Choice Value the user specifies

Generic Query Web Service

The Civic Platform generic query web service provides the following function:

- query

  You can add custom SQL in the generic-query-config.xml (located in \av.biz\conf\av\), and call the query function which references the custom SQL with the

  ```
  sqlName
  ```

  parameter, to perform queries in the following tables.

  - F4PAYMENT
  - ACCOUNTING_AUDIT_TRAIL
  - RBIZDOMAIN, RBIZDOMAIN_VALUE (standard choice)
  - RACCOUNT

Event Manager and Script Engine

The Accela Event Manager and Script Engine (EMSE) uses Javascript to extend functionality associated with Civic Platform events. Civic Platform uses the Rhino open source JavaScript engine to convert configured master scripts into Java classes that Civic Platform can execute. Civic Platform supports an EMSE API for handling EMSE event parameters.