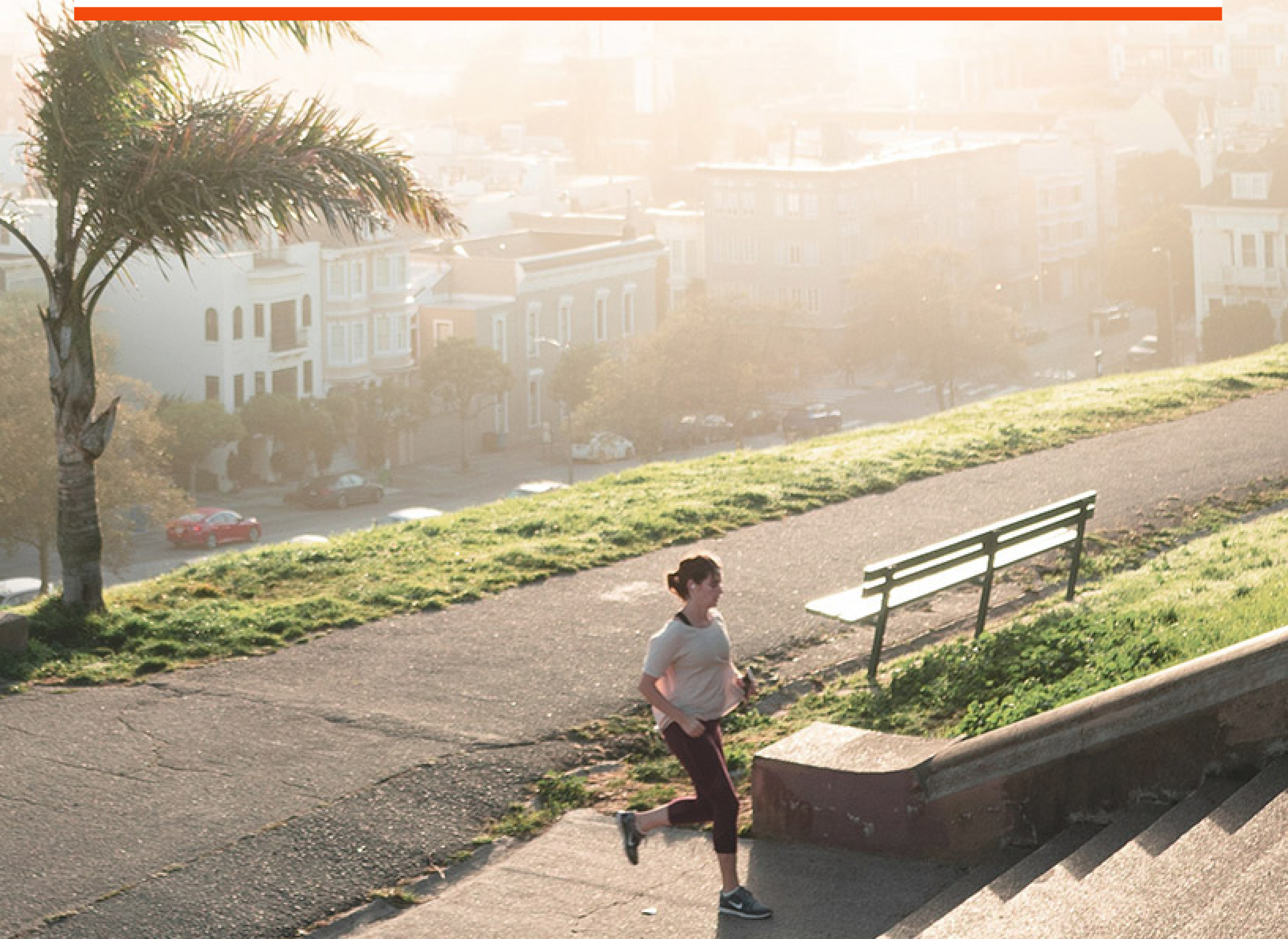
CENTRALSQUARE

Community Development WUM Guide

19.5 premise



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Share your feedback

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Visit this website or scan the QR code below with your mobile device to complete a survey. The survey will open in a new browser window. It should take approximately 2–5 minutes. You'll have the option to let us know you want to be contacted about your survey as well.

Thank you!

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Community Development system administration

System administrators use Community Development Web Utilities & Maintenance (WUM) to set up and manage options that control processing for the Community Development applications.

Community Development system administrators

CentralSquare maintains a record of Community Development System Administrators and notifies these administrators about software and licensing updates, as well as CentralSquare-sponsored events. To add, change, or remove a Community Development System Administrator from our records, contact the CentralSquare support team at 833-278-7877 (833-CST-SUPP).

Community Development key

Each installation of Community Development requires a Community Development key to operate. The Community Development key contains the agency title, number of user licenses, authorized modules, and customized programming.

Tip: Contact CentralSquare to purchase additional licenses or update keys after agency name changes.

Customer support

For support questions or issues, contact the CentralSquare support team at 833-278-7877 (833-CST-SUPP), or visit the support portal at support.centralsquare.com.

Web Utilities & Maintenance (WUM) interface

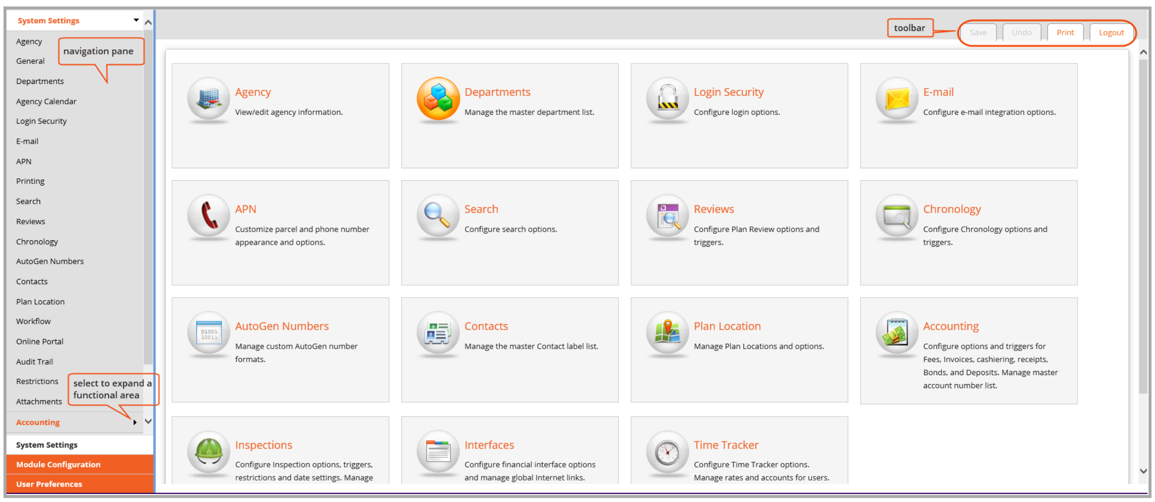
The WUM interface includes three major functional areas:

- System Settings
- Module Configuration
- User Administration

Each area provides extensive options for customizing Community Development processing and operations.

Working in WUM

The following diagram shows the standard WUM navigation pane and toolbar.



Use the navigation pane to access all the system, module, and user settings in WUM. Select to expand a functional area. Select to expand a settings group.

Use the toolbar for quick access to the following common actions:

- Save: Select **Save** to retain changes you made on the current page.

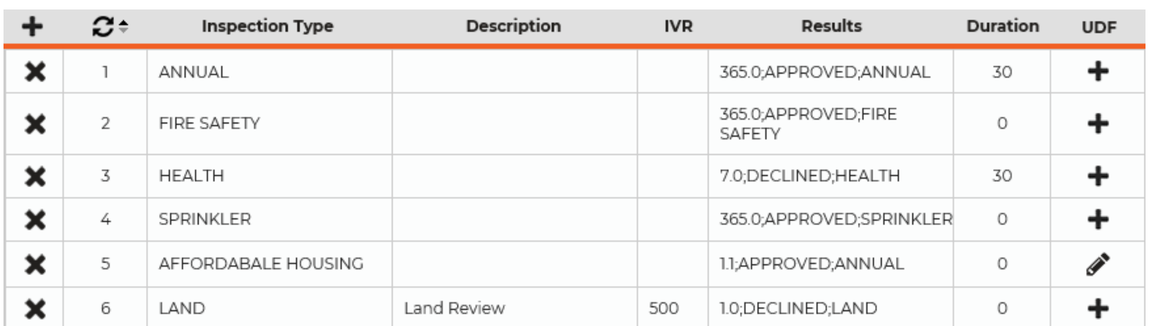
  Tip: In the lower right corner of the screen, the user ID and date of the last recorded change appear.
- Undo: Select **Undo** to discard any changes made since the last save.
- Print: Select **Print** to print your current view.
- Log out: Select **Logout** to log out of WUM.

Working in listings

Listings in WUM can include the following functions:

- Add: To add an entry in a listing, select +.
- Delete: To delete an entry from the listing, select ✖.
- Reorder list: To change the order of the list, use one of the following methods:
  - Drag an item to a different position.
  - Change the number in the order column to indicate the new position for the item. The order column is usually indicated by ⟳ in the header.
  - Select the column heading to sort the column in either ascending or descending order.
- Edit: Select the cell you want to change or select ✎.

> **Note:** The order items in some listings affects the order of options in corresponding fields in Community Development.



+	⟳	Inspection Type	Description	IVR	Results	Duration	UDF
✖	1	ANNUAL			365.0;APPROVED;ANNUAL	30	+
✖	2	FIRE SAFETY			365.0;APPROVED;FIRE SAFETY	0	+
✖	3	HEALTH			7.0;DECLINED;HEALTH	30	+
✖	4	SPRINKLER			365.0;APPROVED;SPRINKLER	0	+
✖	5	AFFORDABALE HOUSING			1.1;APPROVED;ANNUAL	0	✎
✖	6	LAND	Land Review	500	1.0;DECLINED;LAND	0	+

System Settings

System settings contain preferences that apply to the entire Community Development application. System settings include the following functional areas:

- System Settings
- Accounting
- Inspections
- Interfaces
- Time Tracker
- GIS Configurations

System Settings

Use system settings to define and control preferences and processing at the system and agency levels. The following settings groups are available:

- Agency
- General Settings
- Departments
- Agency Calendar
- Login Security
- Email
- Email Templates
- APN
- Printing
- Search
- Reviews
- Chronology
- AutoGen Numbers
- Contacts
- Plan Location
- Workflow
- Online Portal
- Audit Trail

- Restrictions
- Attachments

Agency

The **Agency** page displays Community Development licensing key information and other agency information.

The **Agency Information** section includes the following options:

- **Name**: Your agency name appears here and on the Community Development main screen. The agency name is controlled by the Community Development key.

> **Note:** To change the name in this field, a new Community Development key must be requested from CentralSquare. Additional agency information can be entered for the following fields:

- **Address** (line 1): Type the first line of the street address of your agency.
- Address line 2: This field is not labeled. Type the second line of the street address of your agency.
- **City**: Type the name of the city in which your agency is located.
- **State**: Type the name of the state in which your agency is located.
- **Zip**: Type the ZIP Code for your agency's location.
- **Display Name**: Type the name as you want it to appear on the Community Development main screen below the agency name.
- **Agency Email**: Type the email address you want to use for automatic emails sent from Community Development. Currently, this option is not used.

The **Billing Information** section includes the following options:

- **Address** (two lines)
- **City**
- **State**
- **Zip**
- **Contact Name**

The **License Key** section displays information related to your license key and users. You cannot change these fields.

- **Expires**: Expiration date of the Community Development key.
- **Licenses**: Total number of Community Development user licenses for your agency.

- **Licenses in Use**: Total number of users logged in at this time. A chart appears to the right of this field showing the percentage of logged-in users to total available licenses

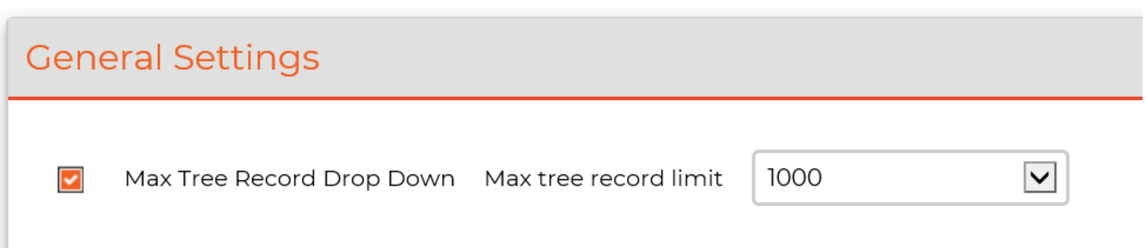
To view a list of users who are logged in, select the **Click here to view Current Activity** link.

General

General Settings

Use the **Max Tree Record Drop Down** check box and **Max tree record limit** field to manage performance speeds by limiting the number of records loaded. This option defaults to **1000** and applies to all activities, including permits. Record sort order varies, however, according to record types as follows:

- Permitting, Projects and Planning, Licensing, Entity Management (AEC): Sorted by applied date
- Code Compliance: Sorted by start date
- CRM: Sorted by created date



ArcGIS Admin Login Options (Use for Tokens)

- GIS Admin Username
- GIS Admin Password

Community Development Logs Path

- Community Development Logs Path

Download Logs Folder

Use the **Download Logs** buttons to download critical error and other logs for Community Development or WUM to provide to the Community Development support team when you create a support ticket.

You can download logs for Community Development or WUM. All logs that are available are downloaded as a ZIP file to the location you choose. By default, the ZIP file name is application_logs_*yyyy_month_dd_time*.

Departments

Use this page to define the master list of agency departments used throughout Community Development.

System Settings > Departments

To add a department, complete the following steps:

1. Select **+**.
2. In the **Departments** column, enter the title.
3. Enter a merchant account number, email template, and email address in the columns if needed.
4. Select **Save**.

To delete a department, complete the following steps:

1. Select **×** in the row of the department you want to delete.
2. Select **OK** to confirm the deletion.

Agency Calendar

Use options on this page to define the work (operational) days and nonwork (nonoperational) days for inspection scheduling.

- **Work Day Start Time** & **Work Day End Time**: Select agency hours using the drop-down menus.
- **Validate Inspection Scheduled** & **Completed Dates with Work Dates Calendar**: Select to compare Inspection Scheduled & Completed dates to the Calendar to validate work days.
- **SET**: Select to automatically set all weekends plus January 1, July 4, and December 25 as nonworkdays for the next six months.

Set additional unique workdays and nonworkdays by selecting the date in the calendar and selecting one of the following options from the drop-down list:

- **AM Closed**: Closes the beginning of the work day until 12:00 pm.
- **PM Closed**: Closes from 1:00 pm to the end of the work day.
- **Office Closed**: Closes the entire work day.
- **Office Open**: Opens the entire work day.
- **Custom**: Sets specific times, in half-hour increments, to mark the office closed.

Login Security

Options on this page define the method or methods that are used by Community Development users to access the application.

Login Method

- **Community Development Login**: Select if you want users to log in with their own unique, Community Development-specific user ID and password.
- **Active Directory Integration**: Select to enable use with Active Directory. See Using Active Directory for more information.
- **Single Sign-On**: Select to enable single sign-on (SSO) for users.
- **LDAP Connection**: Enter and save the connection information, **DCName** (Domain Controller Name) and **Domain** (Domain Name).

Login Options

- **Require User Email Address** must be selected for use with Password Reset when Active Directory is not used. Password Reset forces users to update their password on the next login.
- **Send New Users a Welcome Email** is an available option for new users.
- **Sender Email Address** can be entered here for the standard welcome email.

Password Options

When Active Directory is *not* enabled, the following security standards can be configured in WUM:

- **Password Invitation Link** can be set to expire after the selected amount of minutes.
- **Password Expire** warnings can prompt change of passwords at 30, 90, 120, or 180 days.
- **Lockout User** can lock the user account after failed attempts when set to 3, 5, or 10.
- **User Account Locked** for the selected number of hours. Select **0** to indicate that accounts remain locked until unlocked by an administrator.
- **Complex User Passwords** can be required and configured with the following options:
  - Password length: Minimum and maximum
  - Lowercase characters: Minimum and maximum
  - Uppercase characters: Minimum and maximum
  - Numeric characters: Minimum
  - Special characters: Minimum and eligible
  - Unique password: Count and duration

Note: If you clear the **Require Complex Use Password** check box, passwords must be at least six characters with any combination of letters and/or numbers.

Using Active Directory

Active Directory enables Community Development users to log in using their network password.

- Community Development login screens can be bypassed when configured for single sign-on (SSO).
- LDAP services must be accessible from your perimeter network (DMZ) for CentralSquare Mobiles and Agency Center.

Note: You cannot use OpenID and Active Directory at the same time.

When using Active Directory (AD) with Single Sign-On (SSO) & Persist Security, the following applies:

- IIS must be configured:
  - App Pools must be configured with a Service Domain Account (for example, cstx\sgpsadmin1)
  - Windows Authentication Enabled with Anonymous Authentication Disabled for the sites
- WUM must have the following settings:
  - Domain name specified in the **T9 UserID** field
  - Single sign-on enabled

User Administration > User Names

1. Set up users by entering the **Active Directory domain User ID** into the **T9 UserID** field for each Community Development user for the following user types:
   - Community Development users
   - Web Utilities & Maintenance (WUM) users
   - Agency Center users
   - CentralSquare Mobiles users

   Note: For CentralSquare Mobiles users, **trakituser** must be added for remote support.
2. Enable Active Directory using **Login Method** controls.
3. Contact CentralSquare to update web.config files to support Community Development, eTRAKiT, CentralSquare Mobiles, and WUM.
4. Log in to all products with the domain user name and password to test Active Directory edits.

Email

Community Development supports SMTP (Simple Mail Transfer Protocol) and SSL (Secure Sockets Layer) encryption for emails sent directly from Community Development. Use the options on the **Email** page to configure access to an external email client. The options are:

- **Email Protocol**: Enables or disables the email feature in Community Development. Select one of the following options:
  - **NONE**: Disables the email feature. If you disable the email feature, users cannot send emails directly from Community Development and Community Development does not send automatic emails based on status and other changes.
  - **SMTP**: Enables the email feature. Users can send emails directly from Community Development and Community Development sends automatic emails based on status and other changes.

The remaining options apply only if you select **SMTP**.

- **Server Name**: URL for your SMTP mail server.
- **Port**: Number of the port you use for email (typically 25).
- **User Name**: User name used to access SMTP servers that require a user to sign in before emails are sent.
- **Password**: If your SMTP server requires a user to sign in, password associated with the user account used to access the SMTP servers.

  Important: When you select this field, the existing password is cleared. Do not select this field unless you want to change this password. If you select the field and you do *not* want to change the password, exit the page without saving and then go to the page again.

- **Encryption Method**: Encryption method for emails sent from Community Development. Select **None** if you do not use encryption for emails. Select **SSL** to use Secure Sockets Layer (SSL) encryption for emails.
- **Use Anonymous Authentication**: Anonymous authentication option. Select this check box to use anonymous authentication. Clear this check box if you do not want to use anonymous authentication. If you select this check box, configure your SMTP server to allow connection to SMTP without authentication.

Configuration

To configure SMTP, complete the following steps:

1. In the **Email Protocol** field, select **SMTP**.
2. In the **Server Name** field, type the URL for your SMTP mail server.
3. In the **Port** field, type the port you use for email (typically 25).

4. If your SMTP server requires authentication, type the user name in the **User Name** field and type the password in the **Password** field.

    Important: When you select this field, the existing password is cleared. Do not select this field unless you want to change this password. If you select the field and you do *not* want to change the password, exit the page without saving and then go to the page again.

5. If your SMTP server uses encryption, select **SSL** in the **Encryption Method** field. If your server does not use encryption, select **NONE**.
6. Select **Save**.

Email Templates

Use this page to add, change, or delete email templates for emails sent automatically by Community Development based on your WUM settings. The templates you add on this page are available when you set automatic email options such as **Auto Email by Status** and are used for automatic emails sent from WUM, Community Development, Mobiles, eTRAKiT, and Citizen Engagement Portal. Some email templates are set up during installation and do not change, while other templates can be added and modified as needed.

HTML format templates can include field data that customizes the email for a specific activity record. You can insert the value from any field from the record's primary table. For example, emails related to permits can include fields from the permit_main table and emails related to projects can include fields from the project_main table. For a complete list of fields, see Email template merge fields.

On the **Email Templates** page, you can perform the following actions:

- Add an email template. For more information, see Adding an email template.
- Change an email template. For more information, see Changing an email template.
- Delete an email template. Select × in the row of the template you want to delete and then select **OK** to confirm the deletion. Select **Save**.

The listing on this page includes the following details:

- **Template Group**: Functional category for the template, which enables you to organize and manage your templates. For more information, see Template groups.
- **Activity**: Type of activity record this template is used for. If **Template Group** is **Review Assignment**, this column shows **Permitting**, **Projects and Planning**, or **Licensing**. If **Template Group** is **Activity Status**, this column is blank or shows **CRM**. For all other template groups, this column is blank.
- **Template Name**: Name assigned to this template when it was added.

Template groups

You can categorize your templates into the following groups:

Template Group	Used when…	WUM setting	Format
Activity Status	the status of the activity record changes	**Module Configuration** > *module* > **Types** > *type* > **Auto Email by Status** or **Module Configuration** > **CRM** > **Types** > *type* > **Workflow**	text
ALP	Advanced License Processing (ALP) sends emails	**Module Configuration** > **Licensing** > **Advanced Processing** > **Parameter Sets** > **Operation Setup** > **Send Email**	HTML
Attachment	you want to email a file that is attached to an activity record	**Module Configuration** > *module* > **Preferences** > **Preferences**	text
Inspection Result	the inspection result is set to a specific result	**Module Configuration** > *module* > **Inspections** > **Auto Email by Result**	text
Renewal Manager	eTRAKiT Renewal Manager sends emails *(runs with Job Manager, not available for all customers)*	none	HTML
Review Assignment	the review is assigned or reassigned	**Module Configuration** > *module* > **Reviews** > **Preferences**	text
Review Status	the status of the review changes	**Module Configuration** > *module* > **Reviews** > **Auto Email by Status**	text
Security	a user is new, forgot password, or had login details reset by an admin	none	HTML

Adding an email template

To add an email template, complete the following steps:

1. Go to **System Settings** > **System Settings** > **Email Templates**.
2. Select **+**.
3. In the **Add/Edit Email Template** dialog box, complete the following fields:
   - **Template Group**: Select the functional category for the template.

     If you select **Security**, use the following template names only:
     - SSRP_NewUser
     - SSRP_Forgot
     - SSRP_AdminReset
   - **Activity**: Select the type of activity record this template is used for, such as Permitting or Licensing. If the template group you selected does not have any activity types, the drop-down is unavailable. If the **Template Group** field is **Activity Status**, select **CRM** to use the template for CRM activity records or select the blank option for all other activity records.
   - **Template Name**: Type a name for the template. Template names must be unique within the template group and activity.
4. In the **Content** field, type the subject and body of the email. If the template format is HTML, you can include field data from the activity record and HTML formatting. The setup varies for text formats, CRM-specific text formats, and HTML formats.

   Text format emails

   - To include a subject in the email, type **SUBJECT:** followed by the subject text. If the **Template Group** is **Attachment**, type a maximum of 78 characters.
   - To include body text in the email, type **BODY:** and then the body text of the email. If you include subject text, the body text must be after the subject text.

   Note: You cannot include merge fields in text format emails.

   CRM-specific text format emails

   - To include a subject in the email, type the subject text in the first line of the **Content** field.
   - In the second line of the **Content** field, type the body text of the email.

   HTML format emails

   - To include a subject in the email, type **<head><title>*Subject*</title></head>**, where ***Subject*** is the text of the subject.

- To include body text in the email, type **<body>*Body*</body>**, where ***Body*** is the body text of the email.

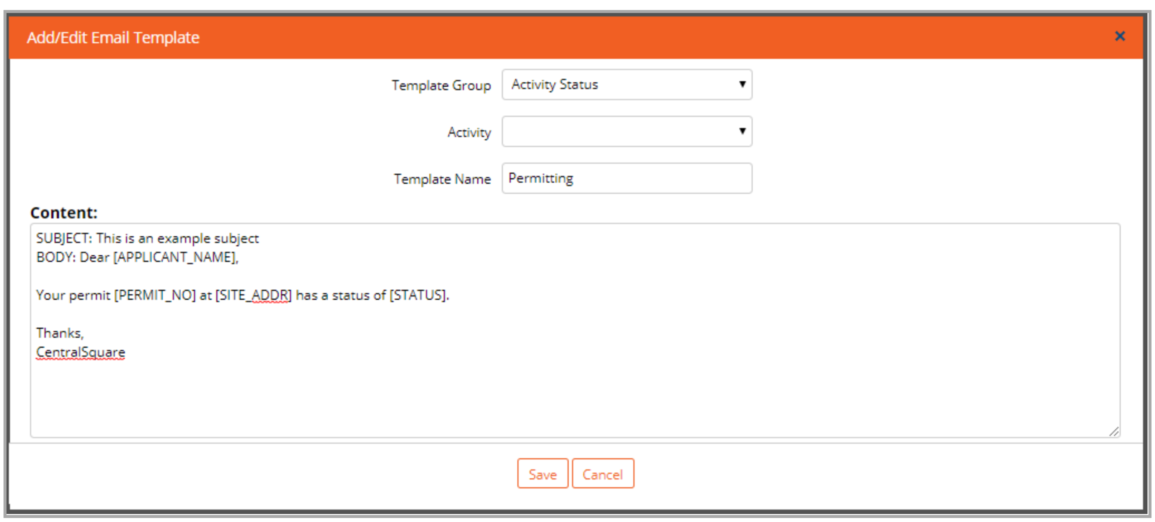
To insert field data, follow these guidelines:

- For text format emails, type the field name in brackets (for example, **[PERMITTYPE]**). For HTML format emails, type the field name in braces (for example, **{PERMITTYPE}**).
- For Review Assignment templates, type an exclamation point (**!**) after the opening bracket before the field name to use a field from the reviews table (for example, **[!ReviewType]**). The following fields are the only fields from the reviews table that you can use in email templates:
    - DATE_DUE
    - DATE_RECEIVED
    - DATE_SENT
    - REVIEWTYPE
    - STATUS
    - CONTACT
    - SITE_ADDR

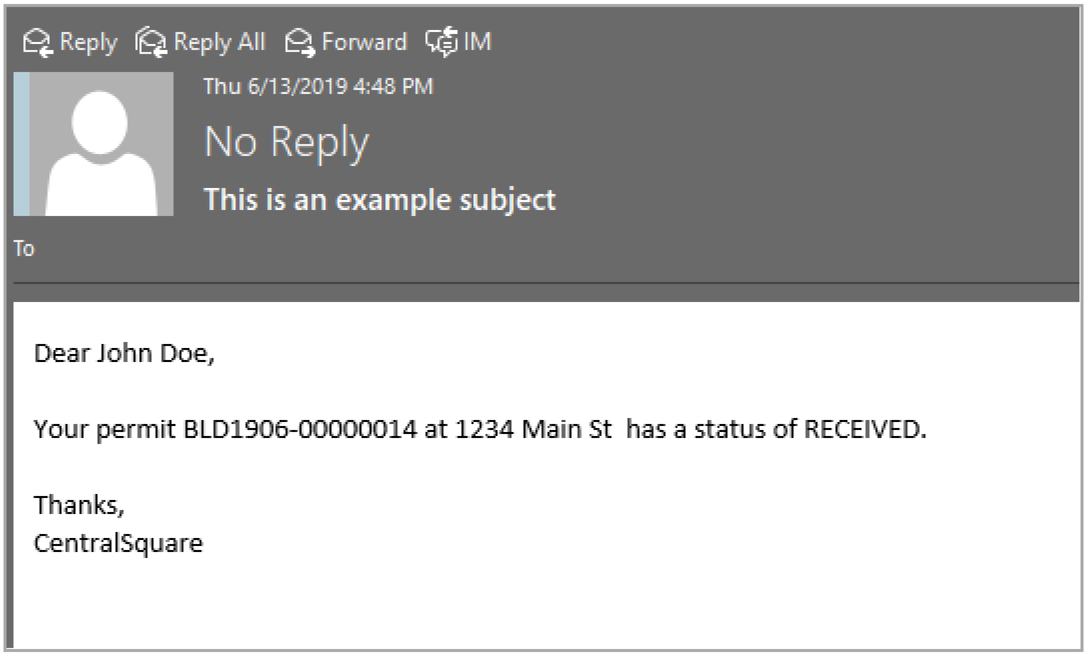
5. Select **Save**. Or, select **Cancel** to close the dialog box without saving the template.

Example:

If you set up the following template:



The citizen receives an email like this:



Changing an email template

To change an email template, complete the following steps:

1. Go to **System Settings** > **System Settings** > **Email Templates**.
2. Double-click in the row of the template you want to change.
3. Update the template group, activity, template name, and content as needed.
4. In the dialog box, select **Save**.
5. On the page, select **Save**.

Deleting an email template

To delete an email template, complete the following steps:

1. Go to **System Settings** > **System Settings** > **Email Templates**.
2. Select in the row of the template you want to delete.
3. Select **OK** to confirm the deletion.
4. Select **Save**.

Email template merge fields

This section lists available email template merge fields for Entity Management, Code Compliance, Licensing, Permitting, CRM, and Projects and Planning.

Entity Management email merge fields

[ST_LIC_NO]
[ST_LIC_ISSUE]
[ST_LIC_EXPIRE]
[BUS_LIC_1_AGENCY]
[BUS_LIC_1_NO]
[BUS_LIC_1_ISSUE]
[BUS_LIC_1_EXPIRE]
[BUS_LIC_2_AGENCY]
[BUS_LIC_2_NO]
[BUS_LIC_2_ISSUE]
[BUS_LIC_2_EXPIRE]
[AECTYPE]
[AECSUBTYPE]
[STATUS]
[COMPANY]
[ADDRESS1]
[ADDRESS2]
[CITY]
[STATE]
[ZIP]
[PHONE_1]
[PHONE_2]
[PHONE_3]
[FAX]
[WEBSITE]
[EMAIL]
[NOTES]
[HOLD]
[HOLD_NOTES]
[TRUSTACCT_NO]
[PIN]
[LIC_GRADE_1]
[LIC_GRADE_2]
[LIC_GRADE_3]
[LIC_GRADE_4]
[LIC_GRADE_5]
[LIC_GRADE_6]
[LIC_CATEGORY_1]
[LIC_CATEGORY_2]
[LOCKID]
[RECORDID]
[OWNER_NAME]
[CO_OWNER_NAME]
[CONTACT1]
[CONTACT2]
[CONTACT3]
[DEFERRED_FLAG]
[DEPOSITTYPE]
[TAX_ID]
[PARENT_AEC_ST_LIC_NO]
[APPLIED]
[BALANCE_DUE]
[FEES_CHARGED]
[FEES_PAID]
[SITE_ALTERNATE_ID]
[SITE_GEOTYPE]
[PASSWORD]
[PASSWORD_CHANGE_DATE]
[MAX_JOBVALUE]
[PHONE_EXT]
[Secret_Answer]
[Secret_QA_Set]
[Secret_Question]

CRM email merge fields

The **Keywords** page (in **Module Configuration** > **CRM**) lists CRM fields you can use and their associated keywords. In your templates, use the field name in the **Your Keyword** column in WUM.

[CATEGORY]	[ISSUE_ID]	[RPT_ADDRESS]
[COMPLETED_DATE]	[ISSUE_LOC_RECORDID]	[RPT_ALTERNATE_ID]
[COMPLETED_DATE_USERID]	[ISSUE_NAME]	[RPT_CITY]
[CREATED_DATETIME]	[ISSUE_PHONE]	[RPT_EMAIL]
[CREATED_USER_ID]	[ISSUE_PREFIX]	[RPT_FAX]
[CREATEDVIA]	[ISSUE_SITE_APN]	[RPT_GEOTYPE]
[DESCRIPTION]	[ISSUE_STATE]	[RPT_LOC_RECORDID]
[DUE_DATE]	[ISSUE_STATUS]	[RPT_NAME]
[DUE_DATE_USERID]	[ISSUE_SUBTYPE]	[RPT_PHONE]
[ISSUE]	[ISSUE_TYPE]	[RPT_SITE_APN]
[ISSUE_ADDRESS]	[ISSUE_ZIP]	[RPT_STATE]
[ISSUE_ALTERNATE_ID]	[LAST_UPDATE_DATE]	[RPT_ZIP]
[ISSUE_CITY]	[LAST_UPDATE_DATE_USERID]	[SEQ_NO]
[ISSUE_EMAIL]	[NOTES]	[TITLE]
[ISSUE_FAX]	[RECORDID]	
[ISSUE_GEOTYPE]	[RESOLUTION]	

Code Compliance email merge fields

[PREFIX]
[YRMO]
[SEQ_NO]
[CASE_NO]
[CASE_NAME]
[STARTED]
[STARTED_BY]
[CLOSED]
[CLOSED_BY]
[LASTACTION]
[LASTACTION_BY]
[FOLLOWUP]
[FOLLOWUP_BY]
[RECEIVED_BY]
[HOW_RECEIVED]
[CaseType]
[CaseSubType]
[CASE_LOCATION]
[SITE_APN]
[SITE_STREETID]
[SITE_NUMBER]
[SITE_STREETNAME]
[SITE_UNIT_NO]
[SITE_CITY]
[SITE_STATE]
[SITE_ZIP]
[SITE_LOT_NO]
[SITE_BLOCK]
[SITE_TRACT]
[SITE_SUBDIVISION]
[SITE_DESCRIPTION]
[SITE_ADDR]
[CODE_SECTION]
[DESCRIPTION]
[ASSIGNED_TO]
[REFERRED_TO]
[STATUS]
[FEES_CHARGED]
[FEES_PAID]
[BALANCE_DUE]
[PARENT_PROJECT_NO]
[OTHER_DATE1]
[OTHER_BY1]
[OWNER_NAME]
[RESIDENT_NAME]
[COMPLAINANT_NAME]
[RECORDID]
[LOCKID]
[LOC_RECORDID]
[DEPOSITTYPE]
[HISTORICAL_APN]
[PARENT_PERMIT_NO]
[PARENT_BUS_LIC_NO]
[REFERENCE_NO]
[SITE_ALTERNATE_ID]
[SITE_GEOTYPE]
[Parent_Generic1_ActivityNo]
[Parent_Generic2_ActivityNo]
[Parent_Generic3_ActivityNo]
[Parent_Generic4_ActivityNo]
[Parent_Generic5_ActivityNo]

Licensing email merge fields

[BALANCE_DUE]
[CHECKBOX1]
[CHECKBOX2]
[CHECKBOX3]
[CHECKBOX4]
[CHECKBOX5]
[CHECKBOX6]
[CHECKBOX7]
[CHECKBOX8]
[COMPANY]
[COMPANY_PRINT_AS]
[DEFAULT_INSPECTOR]
[DEPOSITTYPE]
[EMAIL]
[EMERGENCY]
[APPLIED]
[APPLIED_BY]
[EXPIRED]
[EXPIRED_BY]
[FAX]
[FEES_CHARGED]
[FEES_PAID]
[HISTORICAL_APN]
[ISSUED]
[ISSUED_BY]
[LIAB_CARRIER]
[LIAB_EXP]
[LIAB_ISS]
[LIAB_NO]
[LICENSE_NO]
[LICENSE_SUBTYPE]
[LICENSE_TYPE]
[LOC_RECORDID]
[LOCKID]
[MAIL_ADDRESS1]
[MAIL_ADDRESS2]
[MAIL_CITY]
[MAIL_STATE]
[MAIL_ZIP]
[MAINTEXTFIELD1]
[MAINTEXTFIELD2]
[MAINTEXTFIELD3]
[MAINTEXTFIELD4]
[MAINTEXTFIELD5]
[MAINTEXTFIELD6]
[MAINTEXTFIELD7]
[MAINTEXTFIELD8]
[NOTES]
[OWNER_NAME]
[PARENT_RECORDID]
[PHONE]
[PREFIX]
[RECORDID]
[REFERENCE_NO]
[SEQ_NO]
[SIC_2]
[SIC_3]
[SITE_ALTERNATE_ID]
[SITE_APN]
[SITE_BLOCK]
[SITE_CITY]
[SITE_DESCRIPTION]
[SITE_GEOTYPE]
[SITE_LOT_NO]
[SITE_NUMBER]
[SITE_STATE]
[SITE_STREETID]
[SITE_STREETNAME]
[SITE_SUBDIVISION]
[SITE_TRACT]
[SITE_UNIT_NO]
[SITE_ZIP]
[ST_LIC_EXP]
[ST_LIC_ISS]
[STATUS]
[STATUS_BY]
[TAG]
[TEXTFIELD1]
[TEXTFIELD2]
[TEXTFIELD3]
[TEXTFIELD4]
[TEXTFIELD5]
[TEXTFIELD6]
[TEXTFIELD7]
[TEXTFIELD8]
[W_COMP_EXP]
[W_COMP_ISS]
[W_COMP_NO]
[WRKR_COMP]
[YRMO]
[SITE_ADDR]
[OWNERSHIP_TYPE]
[RESALE_ID]
[SIC_1]
[TAX_ID]
[INVOICE_DATE]
[PHONE_EXT]

Permitting email merge fields

[PREFIX]	[SITE_BLOCK]	[NO_STORIES]
[YRMO]	[SITE_TRACT]	[NO_UNITS]
[SEQ_NO]	[SITE_SUBDIVISION]	[NO_BLDGS]
[PERMIT_NO]	[SITE_DESCRIPTION]	[JOBVALUE]
[APPLICATION_NO]	[TAX_RATE_AREA]	[FEES_CHARGED]
[PLANCHECK_NO]	[SCHOOL]	[FEE_ADJUSTMENTS]
[REFERENCE_NO]	[CENSUS]	[FEES_PAID]
[APPLIED]	[FWDODGE]	[BALANCE_DUE]
[APPLIED_BY]	[SITE_APN]	[OTHER_DATE1]
[APPROVED]	[SITE_ADDR]	[OTHER_BY1]
[APPROVED_BY]	[SITE_NUMBER]	[OWNER_NAME]
[ISSUED]	[SITE_STREETID]	[APPLICANT_NAME]
[ISSUED_BY]	[SITE_STREETNAME]	[CONTRACTOR_NAME]
[FINALED]	[SITE_UNIT_NO]	[RECORDID]
[FINALED_BY]	[SITE_CITY]	[LOCKID]
[EXPIRED]	[SITE_STATE]	[LOC_RECORDID]
[EXPIRED_BY]	[SITE_ZIP]	[PIN]
[VALID_FOR]	[SITE_ST_NO]	[DEPOSITTYPE]
[PARENT_PROJECT_NO]	[LOCATION_DESC]	[HISTORICAL_APN]
[PARENT_PERMIT_NO]	[DESCRIPTION]	[SITE_ALTERNATE_ID]
[PermitType]	[NOTES]	[SITE_GEOTYPE]
[PermitSubType]	[LOT_SF]	[Parent_Generic1_ActivityNo]
[STATUS]	[BLDG_SF]	[Parent_Generic2_ActivityNo]
[OCCUPANCY_TYPE]	[BLDG2_SF]	[Parent_Generic3_ActivityNo]
[GROUPCODE]	[GAR_SF]	[Parent_Generic4_ActivityNo]
[ZONING_CODE1]	[GAR2_SF]	[Parent_Generic5_ActivityNo]
[ZONING_CODE2]	[PORCH_SF]	[PARENT_BUS_LIC_NO]
[CONST_TYPE]	[PORCH2_SF]	
[SITE_LOT_NO]	[HEIGHT]	

Projects and Planning email merge fields

[PREFIX]	[SITE_DESCRIPTION]	[EXPIRED_BY]
[YRMO]	[ZONING]	[OTHER_DATE1]
[SEQ_NO]	[GENPLAN]	[OTHER_BY1]
[PROJECT_NO]	[LAND_USE]	[OWNER_NAME]
[PROJECT_NAME]	[FEES_CHARGED]	[APPLICANT_NAME]
[PROJECTTYPE]	[FEES_PAID]	[DEVELOPER_NAME]
[PROJECTSUBTYPE]	[BALANCE_DUE]	[RECORDID]
[PRIMARY_PIN]	[PROJECT_LOC]	[LOCKID]
[SITE_APN]	[PLANNER]	[LOC_RECORDID]
[SITE_OWNER]	[DESCRIPTION]	[DEPOSITTYPE]
[SITE_ADDR]	[APPLIED]	[HISTORICAL_APN]
[SITE_STREETID]	[APPLIED_BY]	[CONTRACTOR_NAME]
[SITE_NUMBER]	[APPROVED]	[REFERENCE_NO]
[SITE_STREETNAME]	[APPROVED_BY]	[SITE_ALTERNATE_ID]
[SITE_UNIT_NO]	[CLOSED]	[SITE_GEOTYPE]
[SITE_CITY]	[CLOSED_BY]	[Parent_Generic1_ActivityNo]
[SITE_STATE]	[STATUS]	[Parent_Generic2_ActivityNo]
[SITE_ZIP]	[STATUS_BY]	[Parent_Generic3_ActivityNo]
[SITE_LOT_NO]	[STATUS_DATE]	[Parent_Generic4_ActivityNo]
[SITE_BLOCK]	[RESOLUTION_NO]	[Parent_Generic5_ActivityNo]
[SITE_TRACT]	[PARENT_PROJECT_NO]	
[SITE_SUBDIVISION]	[EXPIRED]	

APN

Use these options to select a default format for tax parcel IDs (also known as *assessor parcel number* or *APN*). You can choose a predefined *numeric* format (indicated by #) or *alphanumeric* format (indicated by &), or a custom format that you define using # to represent numbers combined with & to indicate alphanumeric characters. To view a sample of the format you select, type an APN in the **Test a Sample Entry** box.

If you selected the **Enable Tax Map# Search** check box on the **System Settings** > Search page, use the tax map number search listing to control search options for the Search by Tax Map Number feature. This feature enables you to search in Community Development for all or part of an APN. You can set up the search by APN segment, combine segments into a single search field, or split segments into multiple search fields. You do not have to set up search fields for every character of the APN, but the characters you add to search fields must be consecutive.

The tax map number search listing includes multiple rows that each correspond to a portion of the APN that you want to be able to search in Community Development.

For each row in the listing:

- In the **Label** column, type a label to appear for this portion of the APN in the **Tax Map# Search** dialog box in Community Development.
- In the **Required** column, choose whether this portion is required for a tax map number search. Select the check box to require the field. Clear the check box to make the field optional.
- In the **Right Justified** column, choose whether this portion should be right-justified when typed in the **Tax Map# Search** dialog box in Community Development. Select the check box if you want text right-justified for this portion of the APN in the **Tax Map# Search** dialog box in Community Development. Clear this check box if you want the text left-justified.
- In the **Search Length** column, type the number of characters you want included in this search field.

You can set up a maximum of 10 search fields (10 rows in the listing). Select + to add search fields. Select × to delete search fields.

Examples: Assume you defined your APN format as &&& - #### - ### - ##.

To set up the tax map number search listing to enable search for each segment of the APN, you might set up WUM as follows:

Label	Required	Right Justified	Search Length
Segment 1	☑	☐	3
Segment 2	☑	☐	4
Segment 3	☑	☐	3
Segment 4	☑	☐	2

To split the second section of the APN into two search components, you might set up WUM as follows:

Label	Required	Right Justified	Search Length
APN A	☑	☐	3
APN B	☑	☑	2
APN C	☐	☐	2
APN D	☐	☐	3
APN E	☐	☑	2

To combine the last two sections of the APN into a single search field, you might set up WUM as follows:

Label	Required	Right Justified	Search Length
APN A	☑	☐	3
APN B	☑	☐	4
APN C	☐	☐	5

Printing

This preference sets the default output when using the **Print** function.

System Settings > Printing

Defaults

Default Print Action: Select one of the following **Print** options to set the default output:

- **Display** to view the document or report prior to printing.
- **PDF** to view the document or report as a pdf file.
- **Attach & Display** to automatically display the document and attach it to the record.
- **Email** to automatically create an email attachment.
- **Attach & Email** to automatically email the document and attach it to the record.

> **Tip:** Users can override these settings, but **Default Print Action** should be set to the most commonly used format.

Search

- **Enable Tax Map# Search**: Select this check box to enable searching by tax map number in Community Development. Clear this check box if you do not want to enable searches by tax map number. If you select this check box, the following preference appears:
  - **While in Land Management clicking on the Global Search textbox instantly opens the Tax Map# Search window**: If you select this check box, when a user in Land Management selects the search box in the application header, the **Tax Map# Search** dialog box appears instead of the standard search dialog box. Clear this check box if you want to use the standard search functionality for searches from Land Management.

Reviews

This preference provides the ability to set standard options for plan reviews.

System Settings > Reviews

Review Options

- **Restrict Date Returned in Reviews to the current date or future date**: Select to require the user to enter a returned date the same as or later than the current date on the user's computer.
- **Set Date sent on auto reviews to current date**: Select to automatically set the review sent date to the current date when a review is added.
- **Use workdates calendar for aging reviews (default is calendar days)**: Select to define the Community Development Workdates calendar as the source when determining the review's default due date.
- **Set RETURNED DATE when STATUS set on a Review**: Select to automatically set the returned date to the current date when a review status is selected.
- **Send an email alert when the default reviewer (with no alternate) or default AND alternate reviewers are unavailable on the due date of a new review**: Select to give the user ability to include an alternate reviewer in case someone is out of the office for an extended period of time or does not respond to the review in a timely manner. Select **Edit Reviewer(s) Unavailable Alert Email Template** to set up the format for the email.

  The alternate reviewer's name and email address must also be added to the Review List in Permitting or Projects and Planning preferences. Feature functionality is accessed when the reviewer designates time as reserved in his or her Community Development Calendar.
- Select **Edit Reviewer(s) Unavailable Alert Email Template** to customize the email that is sent to the reviewer when a review is added. The alert email is sent when:
  - The default reviewer is unavailable on the due date and no alternate reviewer is defined.
  - The default reviewer and alternate reviewer are both unavailable on the due date. Notification is *not* provided if the due date or reviewer is subsequently changed.

Chronology

This preference provides the ability to set standard options for the **Chronology** pane.

System Settings > Chronology

Chronology Options

- **Show Completed Date on 'ACTION' Entry Screen**: Select to add the completed date to the **Add Actions** screen.

AutoGen Numbers

This preference provides the ability to create a sequential numbering scheme.

System Settings > AutoGen Numbers

To create autogen numbers:

1. Select **+**.
2. Complete the following columns:
   - **Name/Description**
   - **Prefix**
   - **Last Value Used**
   - **Width**: For example, if you enter **4**, the maximum number that could be created is 9999.
   - **Increment By**: For example, if the current number is 50 and this field is **1**, the next available autogen number is 51.
   - **Leading Zero**: If you want leading zeros in the autogen number, select this option.
3. Select **Save**.

Tip: When two items from different modules are selected to be paid at the same time, the receipt number uses what is defined for **Multi_Receipt** in **System Settings** > **AutoGen Numbers**. **Multi_Receipt** must also be selected in the drop-down under **Cash Register Options** in **System Settings** > **Accounting** > **Cash Register**.

Contacts

System Settings > Contacts

Use this page to define the Master Contact List and enable direct lookup.

Contact Options

The **Contact Types** listing defines the Master Contact Type List for all Community Development modules.

To add contact types:

1. Select **+**.
2. Enter contact type.
3. Reorder items in the listing.
4. Save changes.

Note: Contact types must be unique. Duplicates are not allowed.

Plan Location

Plan Location defines and tracks the physical location of a set of plans associated with a Community Development record. Because a physical set of plans can be large or complex enough to occupy several locations, columns for both **Low Number** and **High Number** are provided to identify the entirety of the physical space.

System Settings > Plan Location

Plan Location Options

- **Allow Manual Entry of Plan Location**: Select to allow the user to manually enter the location for a set of plans (for example, **JimsDesk01**).

Adding plan locations

To add a plan location:

1. Select **+**.
2. Enter **Name** or **Description** of a physical location in the field.
3. Enter **Low Number** or starting location (*cube, bin*) of the physical file.
4. Enter **High Number** or ending location (*cube, bin*) of the physical file.
5. **Save** changes.

Workflow

This page is not used.

Online Portal

Use the **Online Portal** page to set system-level options for integration with the Citizen Engagement Portal. This page includes the following options:

- **Reveal Citizen Engagement Module**: Select this option to enable the Citizen Engagement preferences in Module Configuration. When you enable this option, you can access the Citizen Engagement preferences to make changes to the way citizens interact with their community development information and activities through the Citizen Engagement Portal. If you enable integration, see Citizen Engagement for details about customizing the Citizen Engagement Portal.

  Clear this option to disable the Citizen Engagement preferences in Module Configuration.

  > **Important:** If you change this field, you must log out of WUM and then log back in to see the effects of the change.

- **Resync Calculated Columns**: Select this button after you change calculated columns in your database. Selecting this button synchronizes the modified calculated columns with formulas in the UDF table structure. After you select this button, a message appears indicating whether the synchronization was successful or failed.

Audit Trail

This page provides the ability to capture and log system changes.

System Settings > Audit Trail

- **Enable Land Management Audit Trail (Site Change Log)**: Select to provide the ability to create a log entry in the Land Management Site Change Log for changes that are made to Land Management records. The Site Change Log records the following information:
  - Date/time the entry was made
  - Field that was changed
  - New value
  - Old value
  - User making the change
- **Enable Follow Me Audit Trail**: Select this option to display a **NEW** indicator on records in the Community Development Workspace **Follow** pane when the record is updated.
- **Enable Detailed Audit Trail**: Select to provide the ability to create a log of changes made to Community Development records. The feature will add the following two tables in the Community Development database:
  - **Prmry_AuditTrail**: Result of the most standard Community Development operations and contains the following fields:
    - CURRENT_VALUE: The value in the field after the change.
    - FIELD_NAME: The field where the change occurred.
    - ORIGINAL_VALUE: The value in the field prior to the change.
    - PRIMARY_KEY_VALUE: Unique ID of the record that was changed.
    - SQL_ACTION: Code that identifies the type of change (I = Insert, U = Update, D = Delete).
    - TABLE_NAME: The database table name where the change occurred.
    - TRANSACTION_DATETIME: The date and time the change occurred.
    - USER_ID: User ID of the Community Development user who performed the change.

- **Prmry_AuditTrail_SQL**: Is the result of SQL scripts executed against the Community Development database and contains the following fields:
    - SEQ: Sequence number of SQL statement when multiple statements are executed from a single process.
    - SQL_COMMAND: SQL statement that was executed.
    - TRANSACTION_DATETIME: The date and time the change occurred.
    - USER_ID: ID of the Community Development user who executed the script.
- **Enable User Login Audit Trail**: Select to create a unique table in the Community Development database that logs each user's changes. Tables are named **PRMRY_HISTORY_MMYY** (where MMYY is the two-digit month and two-digit year).

Access to Audit Trail Data

Access to Audit Trail tables is available using custom Crystal Reports or SQL Server Reporting Services.

Restrictions

System Settings > Restrictions

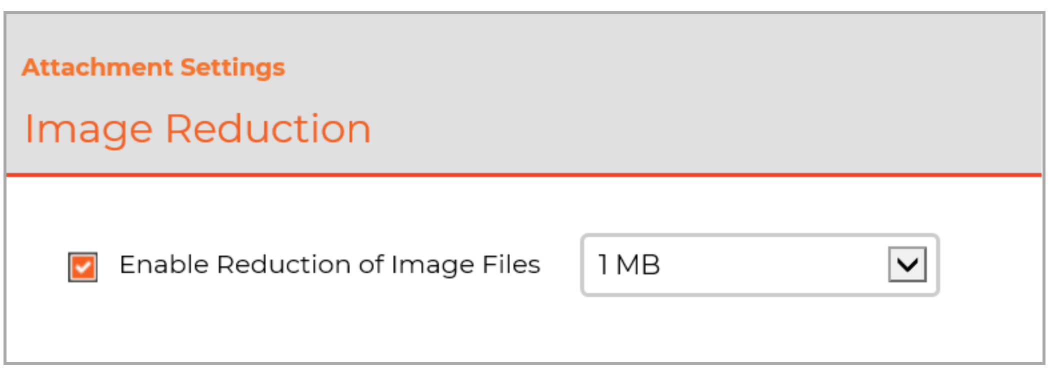
- **Open restrictions and warning flags by default on all records**: Select to ensure all restrictions and warnings are immediately visible on records.

Attachments

This allows reduction of attached images upon upload when they exceed the selected file size limit.

System Settings > Attachments

Use this option to increase performance speeds when generating reports with multiple images. Select the file size limit for images.



Accounting

Accounting contains preferences that apply to the entire Community Development application.

Accounting includes information and configuration for the following features:

- Account Numbers
- Account Distribution
- Fees
- Invoices
- Transactions
- Cash Register
- Online
- Bonds
- Deposits

Account Numbers

Account Numbers contains the master list of financial account numbers used in all Community Development modules.

Existing Community Development clients can build this table from historical data. Select **Build from Fees** to generate the account numbers from fees that currently exist in your database.

To add an account number, complete the following steps:

1. Select +.
2. Enter the account number.
3. If you want to include a description of the account, enter it in **Description**.
4. By default, new account numbers are added at the end of the listing. If you want the account number in a different position in the list, enter the position in the column.
5. Press Enter or select outside the listing to save the new entry.
6. If you entered a position for the new account number, select the column header to refresh the order of the listing.

Account Distribution

These options provide the ability to distribute a single fee into multiple account numbers based on defined percentages. Select **Enable account Re-Distribution (by percentage)** to use this feature.

To create an account distribution, complete the following steps:

1. Select **+**.
2. Enter the account code.
3. (Optional) Enter a description.
4. Select **Add** in the distribution listing.
5. Enter a fund number.
6. Enter an account number.
7. Enter a department number.
8. Enter the percentage of the total fee to distribute to this item. If you enter multiple items, the total of all items must be 100%.
9. Repeat steps 4–8.
10. To use the distribution, insert the account code in the **Account Number** field of the fees or subfees.

Note: This information is only stored in the Community Development database and is normally accessed using either a Financial System export script or a custom report. If you need more information about how to implement this feature, contact CentralSquare.

Fees

Use the system-level accounting fee options to set the standard options associated with fee assessment and collection.

Fee Options

This group includes the following options:

- **Expand Fee Schedule tree when Inserting New Fees**: This option causes the fee tree to automatically display the fee schedule with all fee groups expanded.
- **Enable Fee Audit Tracking**: This option enables the tracking of additions, changes, and deletions to fees by a Community Development system administrator.

  To view a record audit trail, go to an activity record in Community Development. Expand the **Financial Information** pane and then select **Fee History** on the functions menu.

- **Hide the Fee Formulas on the "Add Fees" window in Community Development**: Select this option if you do *not* want fee formulas to appear in the **Add Fees** dialog box in Community Development. Only the fee title appears, which provides a more streamlined view. Clear this option if you want fee formulas to appear in the **Add Fees** dialog box in Community Development. The fee formula appears after the fee title and provides more detail about the fee.

Account Number Options

This group includes the following options:

- **Account Number is Required for all FEES**: This option requires an account number to be assigned to all fees before they are assessed to a record. If a user attempts to enter a fee with no account number, a window appears to prompt the user to enter an account number before the fee will be assessed.
- **Undefined Account Numbers may be derived from Type**: This option provides the ability to assign a single account number to a record type. All assessed fees will be assigned the single account number. To assign an account number to a record type, see Record types.
- **Undefined Account Numbers may be derived from SubType**: This option provides the ability to assign a single account number based on a record’s subtype. All assessed fees will be assigned the single account number.

Deny Observer Access

These options disable actions in the **Financial Information** pane for users logged in with Observer access.

Invoices

Use the **Invoices** page to set preferences related to generating and tracking invoices.

If cashiering is disabled in your database, invoicing is not available.

This feature requires a Community Development-specific invoice that is not automatically installed with the application. Contact CentralSquare if you want to use this feature.

The **Invoices** page includes the following options:

- **Enable Invoicing**: Select this option to use the Community Development Invoicing feature. If you select this option, the **Invoice** column appears in the **Financial Information** pane in Community Development, which includes the invoice date and number. Also, an invoice payment screen is added to the user’s toolbar.
- **Invoice No. AutoGen Name**: This option provides the ability to select the invoice report used for generating receipts.

- **Enable Check Entry**: Select this option to allow users to receipt a check and disburse the funds manually.
- **Number of days for Invoice to be Overdue**: Use this option to define the number of days after which an invoice is considered overdue.

Transactions

This page includes options that apply to all transactions in Community Development.

Transactions

This section includes the following options:

- **Enable Manual Override**: If you want to allow users to override the status of a transaction with a status they choose, select this check box. The **Override Status** button appears in the **Payment Transaction Detail** dialog box. Clear this check box to disable the Override Status feature.

  Users must have the system-level CAN OVERRIDE TRANSACTION STATUS privilege to use this feature.
- **Lock Fees associated to outstanding transactions**: This option controls whether you can pay fees (create fee transactions) on an activity record that has a transaction with a status of **AwaitingResponse** or **TimedOut**. If you do not want to allow payments on records that have transactions with a status of **AwaitingResponse** or **TimedOut**, select this check box. To allow payments even when records have transactions with a status of **AwaitingResponse** or **TimedOut**, clear this check box. For more information about transaction status, refer to the *Community Development User Guide*.

  This option is applicable only if you use the Automatic Recovery feature with a payment processor that supports automatic recovery. If you choose not to use the Automatic Recovery feature, or if your payment processor does not support automatic recovery, clear this check box.
- **Enable Automatic Recovery**: This feature works with **Lookup Interval (minutes)** and **Transaction Timeout (minutes)** if your payment processor supports automatic recovery. This feature applies to payments made over the counter or online.

  If you select this check box, Community Development automatically checks for transactions that did not receive a response within the transaction timeout period since the previous lookup. This process synchronizes Community Development payment transactions with the payment processor's records. To use this feature, payment processor configuration must be defined in **Accounting** > **Cash Register** > **Payment Configuration**.

  If you do not want to use this feature or if your payment processor does not support automatic recovery, clear this check box.
- **Lookup Interval (minutes)**: Indicates how often the application checks for transactions that have had a status of **AwaitingResponse** for the amount of time defined in **Transaction Timeout (minutes)**.

If you cleared the **Enable Automatic Recovery** check box, this field is unavailable.

- **Transaction Timeout (minutes)**: Minimum amount of time a transaction must have a status of **AwaitingResponse** before the application checks for a status update.

Example: If you select **Enable Automatic Recovery** and then set **Lookup Interval (minutes)** to **20** and **Transaction Timeout (minutes)** to **60**, every twenty minutes the application checks for transactions that have had a status of **AwaitingResponse** for at least sixty minutes.

If you cleared the **Enable Automatic Recovery** check box, this field is unavailable.

Convenience Fees

Use the convenience fee options to charge a convenience fee when the payment method is a credit card.

You can charge a flat fee, a percentage of the transaction amount, both, or no convenience fee. You can set up separate fees for over-the-counter (OTC) transactions and online transactions.

Important: This feature is available only if Community Development Cash Register is enabled (**Disable Community Development Cashiering** check box in **System Settings** > **Accounting** > **Cash Register** is cleared).

To charge a convenience fee for over-the-counter payments paid with a credit card:

1. Select the **OTC Credit Card Convenience Fees** check box.
2. Complete the following fields:
   - **Account**: Select the internal account number for the convenience fee.

     Account numbers are defined on the **Accounting** > **Account Numbers** page. To view or change available account numbers, go to the **Accounting** > **Account Numbers** page.
   - **Percent**: If you want to charge a percentage of the payment as part or all of the convenience fee, enter the percentage. For example, to charge 3% of the payment amount, enter **3**. Otherwise, leave this field as **0**.
   - **Flat**: If you want to charge a flat fee as part or all of the convenience fee, enter the fee amount. For example, to charge a flat fee of $4.50, enter **4.50**.
3. Select **Save**.

To charge a convenience fee for online payments paid with a credit card:

1. Select the **Online Credit Card Convenience Fees** check box.
2. Complete the following fields:

- **Account**: Select the internal account number for the convenience fee.

  Account numbers are defined on the **Accounting** > **Account Numbers** page. To view or change available account numbers, go to the **Accounting** > **Account Numbers** page.
- **Percent**: If you want to charge a percentage of the payment as part or all of the convenience fee, enter the percentage. For example, to charge 3% of the payment amount, enter **3**. Otherwise, leave this field as **0**.
- **Flat**: If you want to charge a flat fee as part or all of the convenience fee, enter the fee amount. For example, to charge a flat fee of $4.50, enter **4.50**.

3. Select **Save**.

Payment Methods

This section lists the payment methods you set up.

The order of items in this list controls the order of options in the **Payment Method** field in Community Development.

To add a payment method, complete the following steps:

1. In the **Payment Methods** section, select +.
2. Enter the payment method description and then press Enter. The new payment method is added at the end of the list.
3. If you want the new item in a different position in the list, reorder the list.
4. Select **Save**.

To change a payment method, select the payment method and then enter the changes. Select **Save**.

To remove a payment method, select × in the row and then select **OK**.

Note: If you add payment methods of **cash**, **credit card**, **check**, **deposit**, **trust account**, or **EMV**, or any payment method using these words (such as **credit** or **trust**), you can reorder these payment methods in the list but you cannot change or remove them in WUM. Contact the support team if you need to rename or remove these payment methods.

Cash Register

The options on this page control cash register functions and payment processor configuration.

Important:

Depending on your payment processor, additional configuration is required in eTRAKiT or Citizen Engagement if you want to accept online payments. Contact the support team for more information.

Some payment processors require you to have an SSL (Secure Sockets Layer) certificate for your payment website. Contact your processor to find out if an SSL certificate is required. If an SSL certificate is required, obtain the certificate before setting up the configuration in WUM.

Cash Register settings do not apply if:

- Cashiering is disabled in your database.
- You use the Common Cash Receipts module. Payments are processed through the Common Cash Receipts module and settings are configured in that module, not in WUM.

Cash Register Options

The options in this section control cash register functions in Community Development.

Note: For more information about the Cashiering feature, refer to the *Community Development User Guide*, “Community Development Cashiering” section.

The following options are available for the Cash Register feature:

- **Disable Community Development Cashiering**: If you use Community Development Cashiering, clear this check box.

  If you use the Common Cash Receipts module, select this check box. Then, the remaining options in this section apply only to payments processed in Community Development (not in Common Cash Receipts), such as payments with deposits and trust accounts.
- **Receipt Number AutoGen Name**: Automatically generated (autogen) number type to use on receipts.

  Set up autogen numbers in **System Settings** > **System Settings** > AutoGen Numbers. To view a list of autogen numbers set up by your agency, select the **AutoGen Numbers** link.

  If you select **Disable Community Development Cashiering**, this option applies only to payments processed in Community Development (not in Common Cash Receipts), such as payments with deposits and trust accounts.

- **Mark all available records as selected**: Select this option if you want to automatically select all unpaid fees on any record added to the Cash Register.

  If you select **Disable Community Development Cashiering**, this option is not available.
- **Advance payment date to next business day (work calendar) after**: Use this option to specify the time that the payment date advances to the next business day. Type the hour and minutes in separate (unlabeled) fields and then select either **AM** or **PM**.

  For example, if you want payments made after 4:00 PM to show as paid on the following business day, type **4** in the hour field and **00** in the minute field. Then, select **PM**.
- **Restrict the Paid By Date from being editable**: Select this option if you do not want users to be able to change the **Date** field in the **Payment** dialog box.

Payment Configuration

If you use Cardknox or Paymentus as your payment processor, use this section to define your configuration.

Cardknox

You can enter configuration details manually or import the values from your current web.config settings, if available. To import existing Cardknox settings, select **Import Configuration**. Then select **Yes** to complete the import. Verify your T9_ROOT_FSP preference during the import process.

If you do not have an existing Cardknox configuration, work with Cardknox to obtain the correct values and complete the following fields:

- **Payment Provider**: This field is always **Cardknox**.
- **Payment Key**: Your Cardknox xkey value.
- **Payment URL**: This is a two-part field that defines the URL of your payment engine. The first part is the protocol—https://—which cannot be changed. The second part is the domain.
- **Payment Port**: Number of the port you are using for payment transactions.
- **Reporting Server**: URL of the reporting server you use.
- **Require Signature**: Select **Yes** if you want to require a signature. Select **No** if a signature is optional. The signature requirement can be changed for an individual transaction at the point of sale.

To verify that all the settings are correct, select the **Test Configuration** button. Messages appear on the page to indicate the test was successful or where settings are not configured properly.

Paymentus

Complete fields as follows:

- **Payment Provider**: Select **Paymentus**.
- **Payment Key**: Enter the token that Paymentus provides.
- **Payment URL**: This is a two-part field that defines the one-time payment and autopay payment URL. The first part is the protocol—https://—which cannot be changed. The second part is the domain. Enter the domain for your payment URL.

Online

Use this page to define settings for the payment vendor that processes payments made through eTRAKiT or Citizen Engagement. The following payment processors are supported for eTRAKiT:

- Cardknox
- Paymentus
- Converge
- CardConnect
- Authorize.Net
- CentralSquare Payments—Paya
- JetPay (also known as NCR)
- Municipal Services Bureau (MSB)
- Access Idaho
- USAePay
- PayPal (Payflow Pro)

> **Important:** The field definitions and requirements vary based on each payment processor's requirements. Refer to the Community Development configuration documentation for your payment processor or contact the Community Development support team for processor requirements.

If you use Citizen Engagement, contact the Community Development support team for information about supported payment processors and setup.

The following fields always appear on the page:

> **Note:** These are general field descriptions, not specific to a particular payment processor. Refer to the Community Development configuration documentation for your payment processor or contact the Community Development support team for processor requirements.

- **Payment Gateway**: Name of your payment processor.
- **Payment Vendor URL**: URL of your payment processor.
- **Payment Param1**: Processor-specific parameter 1.
- **Payment Param2**: Processor-specific parameter 2.
- **Payment Return URL**: Web address (URL) for your eTRAKiT GatewayReturn.aspx web page.
- **Payment UserName**: User name for logging in to your account on your payment processor's website.
- **Payment UserPassword**: Password for logging in to your account on your payment processor's website.
- **ShoppingCart Include Receipt On Comment2**: Payee and payment information, such as first name, last name, address, email address, and application types.

The following fields appear depending on the payment processor you use (processor selected in the **Payment Gateway** field):

- **Payment Reporting Server**: Server used for payment status reports.
- **Signature Key**: Authorize.Net signature key, used only if Authorize.Net is your payment processor.
- **Select this option to accept eChecks in eTRAKiT when your payment provider supports eChecks**: If your payment provider supports eChecks, select **TRUE**. When eChecks are supported and you select **TRUE**, an option to pay by eCheck appears in eTRAKiT.
- **Use GatewayReturn2**: This field is not used.

Bonds

This page provides the options and configuration for the **Bonds** pane in Community Development.

The **Bonds** page includes the following options:

- **Allow Bond Reduction even if Fees are Still Due**: Select this option to allow the user to reduce a bond when there is an outstanding bond amount on the record.
- **Limit 'Paid By' to Bond Contacts**: Select this option if you want the **Paid By** field options to include only the names of contacts added to the bond through the **Bonds** pane.

Bonds can be configured with unique contact types, secured-by codes, and bond documentation information.

> **To add a bond contact type, complete the following steps in the Bond Contact Labels listing:**

1. Select +.
2. Enter a unique name for the new bond contact type. The new bond contact type is added to the end of the list.
3. If you want to move the new item to a different position in the list, type the position number in the (reorder) column.
4. Select **Save**.

To add a secured-by code, complete the following steps in the Secured By Codes listing:

1. Select +.
2. Enter a unique name for the new code. The new code is added to the end of the list.

   You cannot use **Trust Account** or **Unknown** for the name.
3. If you want to move the new item to a different position in the list, type the position number in the (reorder) column.
4. Select **Save**.

Deposits

This page provides general options for the Deposits feature.

The **Deposits** page includes the following options:

- **Enable Deposits**: Select this option to allow deposits.
- **Pay fees with deposits automatically (no prompt)**: This option is not used. Instead, when you pay fees, deposit funds are applied first from the largest deposit amount to the largest fee and then to the remaining fees you select in order of largest to smallest. If the largest deposit reaches a $0 balance and additional fees remain, the next largest deposit is used and applied to the fees in the same order (largest to smallest). This process continues until all fees you selected are paid. If the largest deposit has enough funds to pay all the fees, other deposits are not used.
- **Deposit Threshold Warning**: Select this option if you want a warning to appear on records when the deposit balance is less than a specified amount. If you select this option, enter the threshold amount. The warning message appears in the **Financial Information** pane header in Community Development.

For more information about creating deposits, see Deposits.

Finance Enterprise account integration

A Community Development preference for real-time integration with Finance Enterprise is configured in WUM. This preference is located in **System Settings** > **Accounting** > **Account Numbers**.

This functionality uses CentralSquare web services for ledger and account data and authenticates using the User SID. For authentication, the user must be defined in the application pool where WUM is installed, exist in the domain, and be added into Finance Enterprise. The ledger drop-down menu appears empty if not configured correctly.

1. Choose a ledger from the drop-down menu at the top.
2. Select **Search** in the Staging Area and a confirmation message appears.
3. Select **OK** to load Finance Enterprise Accounts into the grid on the left.
4. Drag accounts from the left grid to the right grid to add them to Master Community Development Accounts.
5. Select **Save** to add the new account(s) to the Community Development prmry_accounts table. Community Development then shows the Finance Enterprise accounts on pages where account numbers appear.

Inspections

This page contains preferences that apply to the entire Community Development application.

Inspections includes information and configurations for:

- General Options
- Triggers
- Restrictions
- Date Settings
- Trade List
- Inspection Caps

General Options

IVR & .WAV Options

The following options support Interactive Voice Response (IVR) systems:

- **Enable Inspector PIN usage (IVR)**
- **Enable Inspection Type Code (IVR)**
- **Make .WAV files**
- **Enable IVR Messaging**

Your specific implementation determines whether these options need to be enabled.

Triggers

This page contains the system-wide options for the Inspections feature and includes the following options:

- **Set Inspection Completed Date to current date when Inspection result is Set**: To automatically set the completed date to the current date when a user selects an inspection result, select this check box.
- **Display notice if Fees are due when 'Add Inspection' is clicked**: To display a prompt to the user who identifies the amount currently due on the record, select this check box.

Restrictions

This page contains the system options that limit or require certain types of data in the Inspections feature:

Date Restrictions

- **Prevent COMPLETED date earlier than SCHEDULED date**: If you want to require the user to enter an inspection completion date on or after the scheduled date, select this check box.
- **Prevent COMPLETED date to be Future date**: Use this option to specify whether inspectors can select a date in the future when adding the inspection completed date. If you do not want inspectors to be able to select a future date for the inspection completed date, select this check box. To allow inspectors to select a future date for the inspection completed date, clear this check box.
- **Allow Inspection Type to be Changed if Completed Date Not Set**: If you want to allow the user to change the type of inspection prior to the completion date being set, select this check box.

Inspector Related Restrictions

- **Can't edit Inspector Name without OVERRIDE_INSPECTOR_LOCK permission**: To restrict the ability to reassign or change an inspector's name to either an Administrator or User with the override permission, select this check box.

Date Settings

This page contains the options and preferences that apply to the Inspections feature.

Inspection duration

To define a list of inspection durations:

1. Select **+**.
2. Enter the inspection duration.
3. If you want this duration to be the default for new inspections, select the **Default** check box.

4. Select **Save**.
5. By default, the new item is at the end of the listing. To move the item to a different position in the listing, drag the row. Or, change the number in the column. Then, select **Save**.

Display date fields

- Select **Show 'Completed Date' on 'INSPECTION' entry screen** to add the completed date field to the Add Inspection (cardview) screen.
- Select **Hide 'Scheduled Date' on 'INSPECTION' entry screen** to remove the scheduled date field from the Add Inspection (cardview) screen.

Trade List

Options on this page support the functionality of trade-specific inspections.

To add a trade name to the list:

1. Select +.
2. Enter a name or description of the trade.
3. Select **Save**.
4. To move the item to a different position in the listing, drag the row. Or, change the number in the column. Then, select **Save**.

For more information about trade-specific inspections, see Adding inspection types.

Inspection Caps

Inspection capping enables you to limit the number of inspections that can be scheduled each day for each inspector.

To configure inspection caps, complete the following steps:

1. Select the **Enable Inspection Caps** check box.
2. If you want multiple inspections on the same record to count as one inspection towards the daily cap, select the **Inspection Caps** check box.
3. Review the **Capped Inspectors** list. To add an inspector to the list, drag the inspector's name from the inspectors list on the left to the **Capped Inspectors** list. To remove inspection caps for an inspector, select ×.
4. Assign the capped inspector as the default inspector on the inspection(s) you want to cap. For more information about how to set a default inspector, see Adding inspection types.
5. Go to **System Settings** > **System Settings** > **Agency Calendar**. Ensure that all holidays and nonworkdays are set on your agency's calendar.

To set daily caps for each inspector, complete the following steps:

1. Select **Set Caps**.
2. In the **Select Month** field, choose the month you want to work with. You can set caps up to 90 days in advance.
3. For each day, for each inspector, enter a value to indicate the maximum number of inspections that can be scheduled that day for that inspector. You can enter values in the following ways:
   - Type the number for each day. The values are 0–99. Type a value from 1 to 99 to indicate the maximum number of inspections that can be scheduled. Type **0** to indicate that no inspections can be scheduled for that day.
   - Set a default workday cap for an inspector for the selected month. To set the default cap, type the number of inspections in the **Default** column and then select **Apply**. The default cap is applied to each day in the month and replaces any existing cap values. After setting the default cap, you can manually change the cap for a specific day.
   - Leave the field blank. When you select **Save**, Community Development sets blank workdays to 99.

   Note: Saturday and Sunday are nonworkdays by default and so the caps are set to 0. You can manually change the cap values for these days. If you set a value other than 0, the background changes to green to highlight that inspections can be scheduled for this inspector on this nonworkday.

4. Select **Save** to save your selections. Select **Cancel** to close the dialog box without saving changes.

To enable caps for an inspector:

1. Select the inspector(s) from the **Inspectors Available for Inspection Capping** listing.
2. Add the selected inspector(s) to the list on the right (capped inspector listing).

Important: Zeros entered in the listing indicate that no inspections can be scheduled. Fields will be empty until the inspection cap has been entered. Edited weekend cells appear green. Additional notes and warnings also appear.

Interfaces

This page contains the settings for interconnectivity between Community Development and other applications.

These applications include:

- Global Internet Links
- eTRAKiT
- Forms and Reports
- Mobile
- Spatial Connect
- Spatial Advisor
- Code Resources
- Exchange

Pop-up blockers must be disabled to use these features.

Global Internet Links

Options on this page define the internet and intranet links available to all Community Development users at your agency.

To create links:

1. Select +.
2. Select an option in the **Category** column.
   - **Internet Links**: Accessible through the Internet Links feature.
   - **Code Search Links**: Accessible through Internet Links in Code Compliance on the Notes screens.
   - **Imaging Links**: Accessible through the Imaging Links feature.
3. Enter a title or description for the link.
4. Enter the URL.
5. Select Browser if you want the link to open in a separate browser window.

Special tags can be used in URLs that will allow Community Development to pass data to the website. General tags will work with {all} groups and will map to listed database fields. Tags must be contained in braces { }.

- {**RECORD_NUMBER**}: PERMIT_NO (Permitting), PROJECT_NO (Projects and Planning), CASE_NO (Code Compliance), BUS_LIC_NO (Licensing), ST_LIC_NO (Entity Management), SITE_APN (Land Management)
- {**RECORD_TYPE**}: PERMITTYPE, PROJECTTYPE, CASETYPE, BUSINESS_TYPE, AECTYPE, GEOTYPE
- {**SITE_APN**}: SITE_APN (all modules). *If not present, will return blank.*
- {{**SITE_APN**}}: SITE_APN (all modules). Reformats value to the parcel formatting specified in **System Settings** > **APN**. For more information about parcel number formatting, see APN.
- {**LOC_RECORDID**}: LOC_RECORDID (all modules). *If not present, will return blank.*
- {**RECORD_GROUP**}: Will return group PERMIT, PROJECT, CASE, LICENSE, AEC, PARCEL.

eTRAKiT

System Settings > Interfaces > eTRAKiT

Show eTRAKiT Field in Attachments: Provides the ability to identify which attachments are visible in eTRAKiT. Enabling this feature adds an **eTRAKiT** column to the attachments screen. An attachment with the **eTRAKiT** box selected will be visible in eTRAKiT. Attachments where the **eTRAKiT** box is not selected will not be visible in eTRAKiT.

Forms and Reports

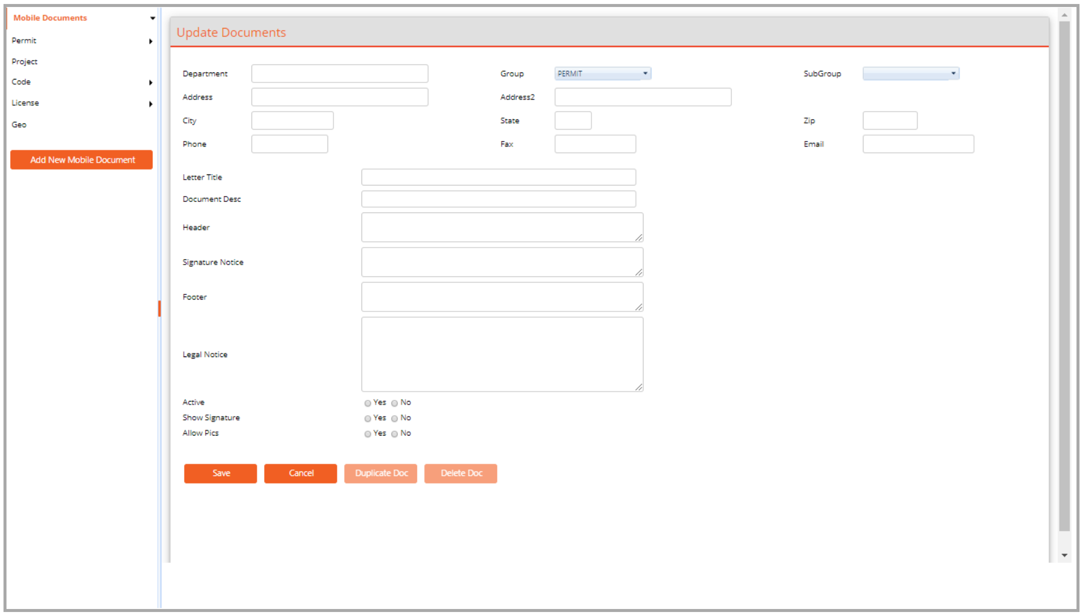
For information about how to create and configure merge documents, see Merge Documents.

If you use SSRS documents, your administrator might need to add the document to the appropriate folder in SSRS manager, and then add the document in WUM.

Mobile

These options enable you to define templates for documents you want to print from CentralSquare Mobiles.

1. Select **Add New Mobile Document**.

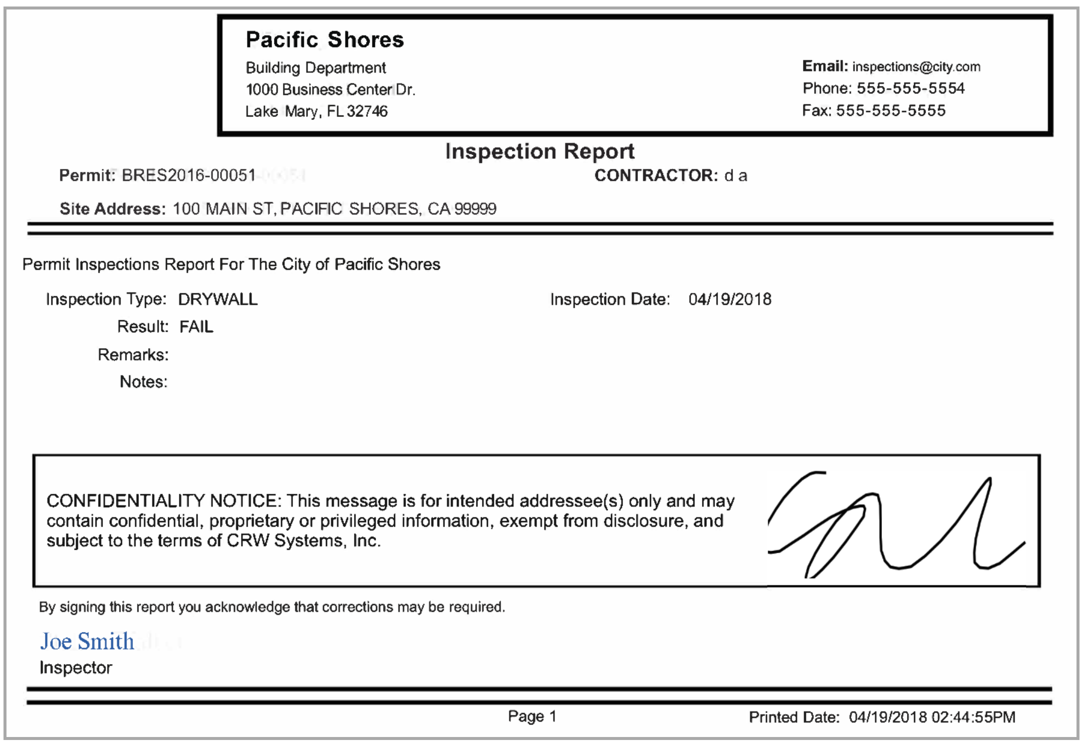


2. Complete the following fields as needed for your document based on your agency's requirements:
   - **Document Name**
   - **Document Desc**
   - **Department**
   - **Group**
   - **SubGroup**
   - **Address**
   - **Address2**
   - **City**
   - **State**
   - **Zip**
   - **Phone**
   - **Fax**

- **Email**
- **Letter Title**
- **Header**
- **Signature Notice**
- **Footer**
- **Legal Notice**
- **Active**: Select **Yes** to make this document available in CentralSquare Mobiles.
- **Show Signature**: Select **Yes** to enable the user to sign the document on the iPad.
- **Allow Pics**: Select **Yes** to enable the attachment of images (maximum of three) to the letter.

3. Select **Save**. The new document appears after CentralSquare Mobiles feeds are refreshed in WUM, usually daily.

   Below is an example result of printing a document in CentralSquare Mobiles with these settings.



Pacific Shores
Building Department
1000 Business Center Dr.
Lake Mary, FL 32746

Email: inspections@city.com
Phone: 555-555-5554
Fax: 555-555-5555

Inspection Report

Permit: BRES2016-00051 **CONTRACTOR:** d a

Site Address: 100 MAIN ST, PACIFIC SHORES, CA 99999

Permit Inspections Report For The City of Pacific Shores

Inspection Type: DRYWALL Inspection Date: 04/19/2018
Result: FAIL
Remarks:
Notes:

CONFIDENTIALITY NOTICE: This message is for intended addressee(s) only and may contain confidential, proprietary or privileged information, exempt from disclosure, and subject to the terms of CRW Systems, Inc.

By signing this report you acknowledge that corrections may be required.

Joe Smith
Inspector

Page 1 Printed Date: 04/19/2018 02:44:55PM

To duplicate (copy) existing documents:

1. Select the module title to expand the list of existing documents.
2. Select the document to duplicate/copy.
3. Select **Duplicate Doc**.
4. Change document elements are needed.
5. Select **Save**.

To delete existing documents:

1. Select the module title to expand of the list of existing documents.
2. Select the document to delete.
3. Select **Delete Doc**.
4. Select **Save**.

Spatial Connect

This preference is available *only with GIS Advanced* and requires additional configuration. Spatial connect allows for real-time GIS updates and spatial drawings on the fly. When using spatial connect real-time GIS updates, Community Development users might notice decreased performance speeds.

For additional Spatial Connect criteria and configuration requirements, contact CentralSquare Professional Services.

Spatial Advisor

Use Spatial Advisor to make automatically generated inspections, conditions, chronology/actions, reviews, and fees based on a location. (For example, a parcel in a historic district or near a river might require different or additional inspections than parcels in other areas.)

Select parameters to set spatial rules for the ArcGIS server.

Code Resources

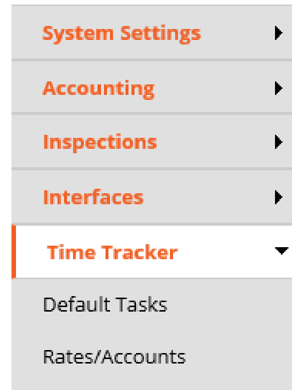
Use the fields on this page to manage the eCodes user name and password.

Exchange

Exchange Settings

Use options on this page to specify settings for the Microsoft Exchange server you use.

Time Tracker



Time Tracker provides the ability to track the amount of time spent on an activity (Chronology, Inspection, or Review) and automatically assess a fee based on the user's hourly rate.

To configure Time Tracker, complete the following steps:

1. Set the general options.
2. Define the default tasks.
3. Assign hourly rates and account numbers.

General Options

Time Tracker provides the ability to choose general preferences, including Community Development and WUM notification options.

Select the check box next to the desired activities and notification options.

Default Tasks

Time Tracker provides the ability to associate time with a generic activity or specific activity through **Default Tasks**.

You can select whether to use the generic title (Chronology Action, Inspection, or Review) or the activities title.

To use the generic title, select **Use "CHRONOLOGY ACTION" as Task Type**, **Use "INSPECTION" as Task Type**, or **Use "REVIEW" as Task Type**.

To use activity-specific titles:

1. Select **Use specific Action Type**, **Use specific Inspection Type**, or **Use specific Review Type**.
2. Select **Create Tasks for all Action Types**, **Create Tasks for all Inspection Types**, or **Create Tasks for all Review Types**.
3. Select **Save**. This creates a separate entry for each activity.

Rates/Accounts

To set the rate and accounts for a user, complete the following steps:

1. Select the user from the drop-down menu.
2. Enter the **Rate ($/hr)** for each task.

3. Select an account number for each task.
4. Select **Save**.

The following buttons are available:

- **Set All Rates**: To set the same rate for every activity for the selected user, select this button.
- **Set All Acct Numbers** To set the same account number for every activity for the selected user, select this button.
- **Copy to Other Users**: To copy the rates and account numbers from the selected user to another user, select this button.

> **Tip:** The deposits feature can be combined with Time Tracker to automatically create a fee that reduces or draws down the deposit as fees are incurred through the review, inspection, or chronology activity features. For more information about deposits, see Deposits.

GIS Configurations

The options in this group control maps and map features in Community Development and eTRAKiT. These options are set up by a CentralSquare GIS specialist during implementation or automatically configured when you upgrade to 19.3 or later. These options rarely require changes.

> **Warning:** ***Changes to these options can prevent GIS from working for your agency.*** If you want to change map services or map features, contact the Community Development support team.

GIS Configuration

This page stores settings that control the maps and map features in the GIS module of Community Development, including options for Spatial Advisor, geotype layers, map services, and map-related URLs.

Spatial Advisor Enable Option (Community Development)

- **Enable Spatial Advisor for Community Development**: Spatial Advisor is included with a GIS Advanced license and is used to optimize business processes such as adding a review or fees to a permit. If you have GIS Advanced and you want to use Spatial Advisor, select this check box. If you do not want to use Spatial Advisor or if you do not have GIS Advanced, clear this check box.

Geotype Layers/Map Service Option for ArcGIS Online

- **Select GeoType Layers/Map Service Configuration Option**: Source of maps in Community Development. Select one of the following values:

- **Default GIS Configuration**: Use a self-hosted ArcGIS server on premise.
- **ArcGIS Online Configuration**: Use ArcGIS online maps hosted by Esri.

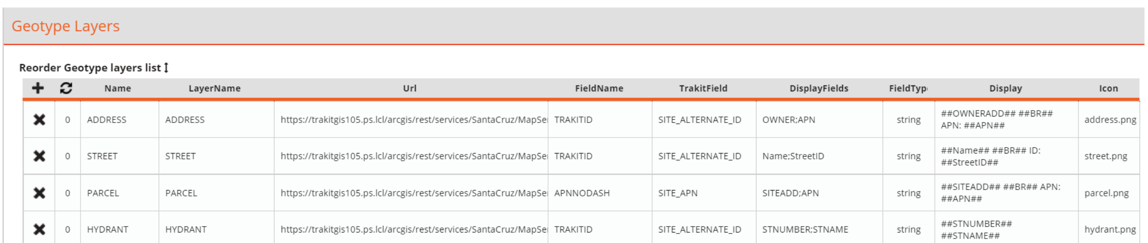
Geotype Layers

Use this section to link parcels from the map service to the Land Management record in the Community Development database. These options correspond to the Prmry_Types table, groupname GEO.

To add a layer, select +, and then complete the fields in the new row. Select **Save**.

To edit a layer, select a field in the row, and then make changes. Select **Save**.

To remove a layer, select ✖ in the row, and then select **OK**. Select **Save**.


Geotype Layers

Reorder Geotype layers list ↕

+		Name	LayerName	Url	FieldName	TrakitField	DisplayFields	FieldTyp	Display	Icon
✖	0	ADDRESS	ADDRESS	https://trakitgis105.ps.lcl/arcgis/rest/services/SantaCruz/MapSe	TRAKITID	SITE_ALTERNATE_ID	OWNER;APN	string	##OWNERADD## ##BR## APN: ##APN##	address.png
✖	0	STREET	STREET	https://trakitgis105.ps.lcl/arcgis/rest/services/SantaCruz/MapSe	TRAKITID	SITE_ALTERNATE_ID	Name;StreetID	string	##Name## ##BR## ID: ##StreetID##	street.png
✖	0	PARCEL	PARCEL	https://trakitgis105.ps.lcl/arcgis/rest/services/SantaCruz/MapSe	APNNODASH	SITE_APN	SITEADD;APN	string	##SITEADD## ##BR## APN: ##APN##	parcel.png
✖	0	HYDRANT	HYDRANT	https://trakitgis105.ps.lcl/arcgis/rest/services/SantaCruz/MapSe	TRAKITID	SITE_ALTERNATE_ID	STNUMBER;STNAME	string	##STNUMBER## ##STNAME##	hydrant.png

Each layer includes the following details:

- **Name**: Name of the geotype layer. This should match the TypeName column in the Prmry_ Types database table.
- **LayerName**: Layer name from the mapservice.
- **Url**: REST endpoint URL that connects your Community Development and map service.
- **FieldName**: Connection between your Community Development database and map service per record.
- **TrakitField**: Name of the corresponding field in the Community Development database.
- **DisplayFields**: Name of fields from the map service when the multiselect feature is used.
- **FieldType**: Database field type. Usually, the value is **string**.
- **Display**: Metadata information from your map service when the multiselect feature is used. Enter **##** to identify a field from the map service.

  For the PARCEL geotype, SA_Street_ and AIN from the map service are used to display information when the multiselect feature is used.
- **Icon**: File name of the icon used in the map display in the GIS module in Community Development. In most cases, this is **parcel.png** for PARCEL geotype or **address.png** for ADDRESS geotype.

If you want to use a custom icon, add the icon file to *Community Development root folder*/arcGIS/icons.

Map Services

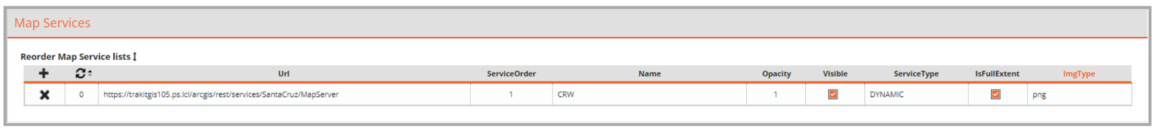
Use this section to manage the map services you use.

You can configure more than one map service. However, CentralSquare strongly recommends that you publish a single map service to include all the layers (geotype and nongeotype).

To add a service, select **+**, and then complete the fields in the new row. Select **Save**.

To edit a service, select a field in the row, and then make changes. Select **Save**.

To remove a service, select **×** in the row, and then select **OK**. Select **Save**.



Each service includes the following details:

- **Url**: URL of the map service.
- **ServiceOrder**: This is not used.
- **Name**: User-defined name of the map service. Do not use special characters or spaces in the name. However, you can use an underscore (_).
- **Opacity**: Degree of opacity. Enter a value from 0 to 1. A value of 0 indicates 0%—fully opaque, a value of 0.5 indicates 50% opacity, and a value of 1 indicates 100%—fully transparent.
- **Visible**: If you want this map service to appear when the map loads in the Community Development GIS module, select this check box. Generally, if you use multiple map services, you should select this check box.

  If you clear this check box, the map service is not visible until you open the GIS Table of Contents and manually select the map service.
- **ServiceType**: Enter one of the following values:
  - **DYNAMIC**: Draw maps when they are requested by the user.
  - **TILED**: Use cached images (tiles) to render the map.
- **IsFullExtent**: If you want the map to show as full extent when the map first loads, select this check box. Otherwise, clear this check box.
- **ImgType**: Type of image. The default value is **png32**. You can change this value or leave it blank, but CentralSquare recommends that you use the default value.

GIS Settings

Options in this section define REST endpoints, URLs, print layouts, proxy settings, and Google Maps settings. The options are:

- **Map Geometry ServiceURL**: Geometry service REST endpoint. This endpoint is used for geometric operations within Community Development, such as measuring distance and calculating the area of a parcel.
- **Print URL**: Print service REST endpoint.
- **AGS URL**: Root URL for the ArcGIS server.
- **Map URL**: Map service REST endpoint used in Community Development as a primary service.
- **Feature Service URL**: Map service REST endpoint for spatial querying based on attributes. If you want to use a feature service for Advanced GIS Query operations, enter the feature service URL.
- **Route URL**: Map service REST endpoint for calculating the shortest distance between two locations. If you use the Route Inspections tool, enter the route URL to use.
- **GeoCode URL**: Map service REST endpoint for geocoding addresses.
- **OverView Map URL**: Map service REST endpoint which is used as an overview map. The overview map appears in GIS in the lower right corner of the map.
- **Print Layouts**: Print layouts supported by the ArcGIS server. To enter multiple print layouts, separate values with a semicolon (;).

  Example: MAP_ONLY;A3 Landscape;A3 Portrait;A4 Landscape;A4 Portrait;Letter ANSI A Landscape;Letter ANSI A Portrait;Tabloid ANSI B Landscape;Tabloid ANSI B Portrait

- **GIS URL**: Prefixed string referencing the ASP page that renders the map in Community Development. The value must be **arcgis/trakitMapv4.aspx**.
- **Google Maps Key**: Google map key used for Google Maps (map view) and Google Maps Street View. Your Community Development URL should be associated with this key.
- **Stacked Parcels**: Determines whether parcels are stacked on top of each other. To stack parcels, select **TRUE**.
- **Street View**: If the Google Maps key is available for Google Maps Street View, select **TRUE**. If you are not using Google Maps Street View, select **FALSE**.
- **Earth**: Do not use this field.
- **Always Use Proxy**: Proxy use indicator. If you select **TRUE**, the map service must authenticate with a token for access. Enter the user name and password in **System Settings** > **General**, in the **ArcGIS Admin Login Options (Use for Tokens)** section. If your map service does not require authentication (user name and password), select **FALSE**.
- **Free Esri GeoCoder**: This field is not used and should be set to **FALSE**.

- **Initial Extent**: This field is not used and should be set to **FALSE**.
- **Spatial Connect**: If you use Spatial Connect, select **TRUE**. If you do not use Spatial Connect, select **FALSE**. Spatial Connect is available only if your agency has a GIS Advanced license.
- **IWA**: If you use Integrated Windows Authentication (IWA) to integrate your GIS server with Windows accounts, select **TRUE**. When a user tries to access a resource on the GIS server (REST endpoint), the GIS server redirects the request to the Identity Server to authorize the user's credentials.

  If you do not use IWA, select **FALSE**.

Base Map Settings

The option in this section defines the basemap type you use.

- **Base Map Type**: Basemap type you want to use in Community Development. Esri defines the available types. For a complete list of types, go to https://developers.arcgis.com/javascript/latest/api-reference/esri-Map.html#basemap.

Proxy List

Use options in this section to add valid proxy referrer URLs for the internal GIS proxy component, including all those required by the basemap.

To add a URL, select +, and then enter the URL in the new row. Select **Save**.

To edit a URL, select the URL, and then make changes. Select **Save**.

To remove a URL, select × in the row, and then select **OK**. Select **Save**.

eTRAKIT GIS Configurations

Spatial Advisor Enable Option (eTRAKiT)

- **Enable Spatial Advisor for eTRAKiT**: Spatial Advisor is included with a GIS Advanced license and is used to optimize business processes, such as adding a review or fees to a permit. If you have GIS Advanced and you want to use Spatial Advisor with eTRAKiT, select this check box. If you do not want to use Spatial Advisor or if you do not have GIS Advanced, clear this check box.

  Note: The Spatial Advisor URL must be publicly available. In other words, the URL should be accessible over the internet.

eTRAKiT GeoType Layers

This section shows the geotype layers you added on the **GIS Configuration** page *for reference only*. Do not add, change, or delete geotype layers from this page. To make any changes to geotype layers, go to **GIS Configurations** > **GIS Configuration** > **Geotype Layers**.

eTRAKiT GIS Settings

Options in this section define REST endpoints, URLs, print layouts, proxy settings, and Google Maps settings. The options are:

- **Map Service**: URL of the map service.
- **Map Geometry ServiceURL**: Geometry service REST endpoint. This endpoint is used for geometric operations within Community Development, such as measuring distance and calculating the area of a parcel.
- **Print URL**: Print service REST endpoint.
- **Feature Service URL**: Map service REST endpoint for spatial querying based on attributes. If you want to use a feature service for Advanced GIS Query operations, enter the feature service URL.
- **GeoCode URL**: Map service REST endpoint for geocoding addresses.
- **Use GIS Proxy**: Proxy use indicator. If you select **TRUE**, add URLs in the Proxy List section.
- **Free Esri GeoCoder**: If you want to use the free geocoder from Esri, select **TRUE**. Note that the free geocoder has some limitations. If you do not want to use the free geocoder from Esri, select **FALSE**.

Proxy List

Use options in this section to add valid proxy referrer URLs for the internal GIS proxy component, including all those required by the basemap.

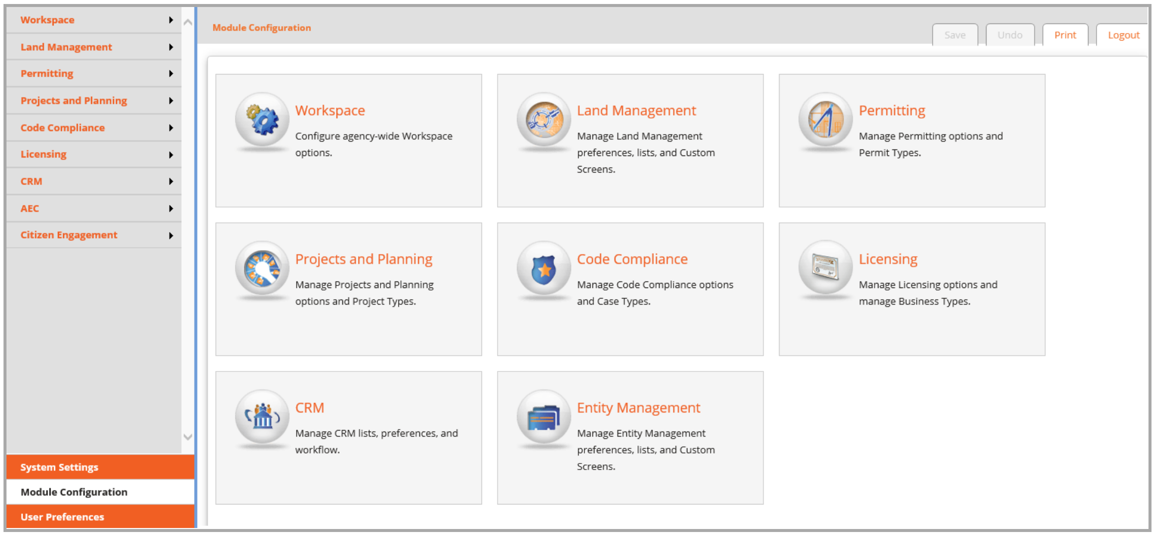
To add a URL, select +, and then enter the URL in the new row. Select **Save**.

To edit a URL, select the URL, and then make changes. Select **Save**.

To remove a URL, select × in the row, and then select **OK**. Select **Save**.

Module Configuration

Use options in Module Configuration to set preferences and requirements for specific areas of Community Development such as Permitting or Licensing. Options vary by area and can include setup or processing for record types, fees, reviews, inspections, custom screens, and automatic emails.



Workspace

The following option is available in the Workspace settings:

- **Include Subdivision within the My Tasks, Inspection Center, and Review Center widgets**: Select this option to display the subdivision name for residential addresses in the Community Development Workspace **My Tasks**, **Inspections**, and **Reviews** panes.

Enable Extended Filter

Adds the ability for the user to filter inspections in the **Inspection** center by ZIP Code or city name.

Land Management

The Land Management area contains preferences specific to land records.

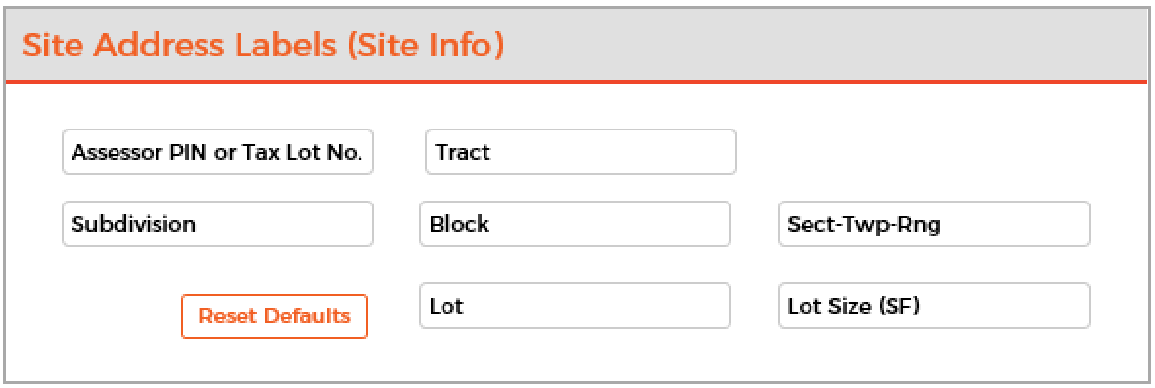
Site Info

Site Address Validation

Use the **Require linking to a Land Management record** option to require users to link new records to a Land Management record. This prevents users from entering site information directly on the record. Users must add Permitting, Projects and Planning, and Code Compliance records from the Land Managementrecord or from a Permitting, Projects and Planning, or Code Compliance record that is linked to the Land Management record that the new record will be linked to.

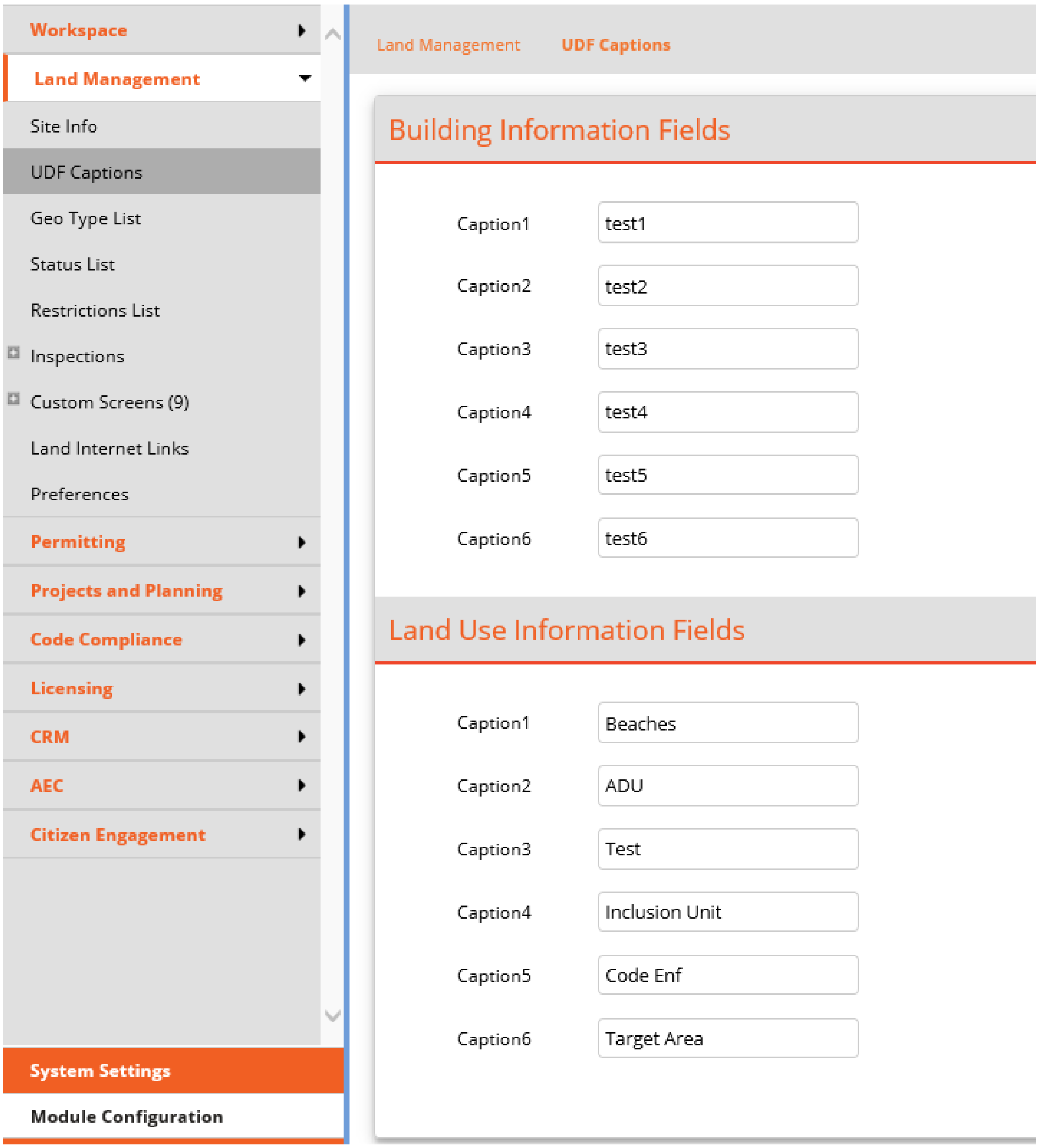
Site Address Labels

Use these options to customize the labels attached to the data fields in the Land Management site address section of Community Development. Enter unique labels on an as-needed basis. The **Reset Defaults** button returns the fields to the default labels, as shown in the image below.



UDF Captions

Use these settings to rename six captions in the **Building & Land Use Info** pane in Community Development. The corresponding fields in the database are located in Geo_OwnershipUDF and titled BLDGDATA01, BLDGDATA02, BLDGDATA03, BLDGDATA04, BLDGDATA05, BLDGDATA06, LANDUSE01, LANDUSE02, LANDUSE03, LANDUSE04, LANDUSE05, and LANDUSE06.



Geo Type List

Define specific geotypes that are used in the geo type list.

Add a geotype:

1. Select **Add** and enter the new geotype title.
2. (Optional) Sort the list.
3. Select **Save**.

Status List

Define the status list for Land Management records.

Add a status

1. Select **Add**.
2. Enter the new status.
3. (Optional) Sort the list.
4. Select **Save**.

Restrictions List

Define the restrictions list for Land Management records.

Add a restriction

1. Select **Add**.
2. Enter the new restriction.
3. Select **Save**.

Inspections

For information about configuring Inspections, see Inspections.

Custom Screens

For additional information about configuring custom screens, see Custom Screens.

Land Internet Links

For information about configuring internet links, see Module-Specific Internet Links.

Preferences

Land Management Settings

- **Allow users to edit type**: Choose whether to make the **Edit Type** function available for this module in Community Development. If you select the check box, the **Edit Type** function is available in Community Development. If you clear the check box, the function is not available in Community Development.

Parcel Options

- **Lock Parcel record when record status is**: This preference locks the Land Management record using the status field. For additional information about how to maintain the Land Management status list, see Status List.
- **Lock Parcel when Permit, Project, Case, or License Status has the Parcel-Lock flag turned on**: Enables you to set a specified status on a record in Permitting, Projects and Planning, or Code Compliance that would prevent any user from creating a new record linked to the Land Management record.

  To enable this feature:

  1. Go to **Module Configuration** > **Land Management** > **Preferences**.
  2. Select the **Lock Parcel when Permit, Project, Case, or License Status has the Parcel-Lock flag turned on** check box.
  3. Go to **Module Configuration** > **Permitting**, **Projects and Planning**, or **Code Compliance** > **Status List**.
  4. Select **Parcel Lock** for every status that can lock the Land Management record.

  A Land Management record can be locked by multiple records. A user will not be able to create a new record on the Land Management record until all locks are removed.

  To display the record number(s) and the user who applied the status lock, select the **Locked** indicator in Land Management.
- **Use AutoGen Number for New Parcels**: Used to identify the auto-number generator for temporary Land Management records.

  Important: The prefix for the auto-generated number used for temporary Land Management records *must* begin with the letter **T**. CentralSquare recommends using the prefix **TEMP**.
- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the user's privileges). Does not apply to system administrators.
- **Lock Status**: Enables lock status on parcel except for system administrators.

Addressing Options

- **Use advanced addressing fields with separate text boxes for each address element**: This feature adds fields to the Geo_Ownership table and the Land Management interface for street prefix, street name, street type, street suffix.

  Enabling this feature permanently alters the Geo_Ownership table.
- **Use Foreign Addressing**: Adds an additional field to enter the country code. Enter the default country code in the text box.
- **Use for Site Unit No**: Provides the ability to rename the **Site Unit No** field label.

Attachment Auto-Email Preferences

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Licensing

The Licensing area contains module-specific configurable components and preferences.

Advanced Processing

Use Advanced License Processing (ALP) to specify and perform license operations such as late fee assessment, automatic expiration, and email notification in bulk and unattended. Set up rules for batch processing in Community Development WUM and then perform the batch processing from Community Development, where you can also view the resulting changes to Licensing records.

Before using ALP functions in Community Development, set up the following options:

- Renewal Periods
- Parameter Sets
- Fee Assessment Rules

Renewal Periods

Use the renewal period options to add, modify, or delete date ranges used for renewal processes. After you set up renewal periods, assign a renewal period to each license type. Licenses that are assigned a renewal period can be renewed during the renewal period only.

Adding a renewal period

To add a renewal period, complete the following steps:

1. Go to **Module Configuration** > **Licensing** > **Advanced Processing** > **Renewal Periods**.
2. In the renewal period table, select **+**. A new row appears in the table.
3. Type or select values in the **Name**, **Month Start**, **Day Start**, **Month End**, and **Day End** columns.
4. Select **Save**. The date range appears in the **Date Range** column.

Community Development calculates the year portion of renewal periods and increments the year automatically. You do not have to enter a year when adding a renewal period.

A renewal period can cross calendar years. For example, a renewal period can start on November 1, 2021, and end on February 15, 2022.

Assigning a renewal period to a license type

Use this feature to assign one or more renewal periods to license types and subtypes.

You can assign multiple renewal periods to a license type as long as the renewal periods do not overlap (do not include any of the same dates).

Renewal periods assigned to a license subtype override the renewal period assigned at the type level. If you do not want a subtype to use the type-level renewal period, you must add a parameter set for the subtype. The parameter set for the subtype can be blank if you do not want a renewal period assigned to the subtype.

To assign a renewal period to a license type, complete the following steps *for each license type and/or subtype:*

1. Go to **Module Configuration** > **Licensing** > **License Types** > *license type* > **Parameter Sets**.
2. In the parameter set table, select **+**. A new row appears in the table.
3. In the **Renewal Period** column, select a renewal period.

   For more information about the **Parameter Set** column, see Parameter Sets.
4. Select **Save**.

Additional renewal period actions

In **Module Configuration** > **Licensing** > **Advanced Processing** > **Renewal Periods**, you can modify or delete a renewal period.

To modify a renewal period, select the row you want to change and change the fields as needed. Then select **Save**.

To delete a renewal period, select × in the row you want to delete. Select **OK** and then select **Save**.

Parameter Sets

Parameter sets are collections of actions that are completed during batch processing. Use the options on the **Parameter Sets** page to specify rules for renewing licenses through ALP batch processing.

To update an existing parameter set, select the corresponding column in the grid to change the parameter set name, description, or type. Select **Operation Setup** to change the actions that occur during batch processing for that parameter set.

To add a parameter set, complete the following steps:

1. Select +. A blank row appears in the grid.
2. Type the name and description for the parameter set.
3. Select the type of processing. The options are:
   - **Renewal**: Can only be run during a renewal period set up on the **Renewal Periods** page.
   - **Ad Hoc**: Can be run at any time and as often as required.
   - **Branch**
4. Select **Save**.
5. Select **Operation Setup** in the row you added.
6. Drag operations (actions) from the master list to the new parameter set.
7. When the parameter set includes all the actions you want to perform, select **Save**.
8. For each item in the parameter set listing:
   a. Select **Operation Values Setup**.
   b. Choose the values for each item in the listing.
   c. Select **Save**.
   d. Select **Back**.
9. Select **Back**.

The following additional options are available for parameter sets:

- **Batch Email eTRAKiT Renewals**
- **eTrakit Email URL**
- **Assigned Owner to Shared Search Group**
- **Change Assigned Owner to Shared Search Group**

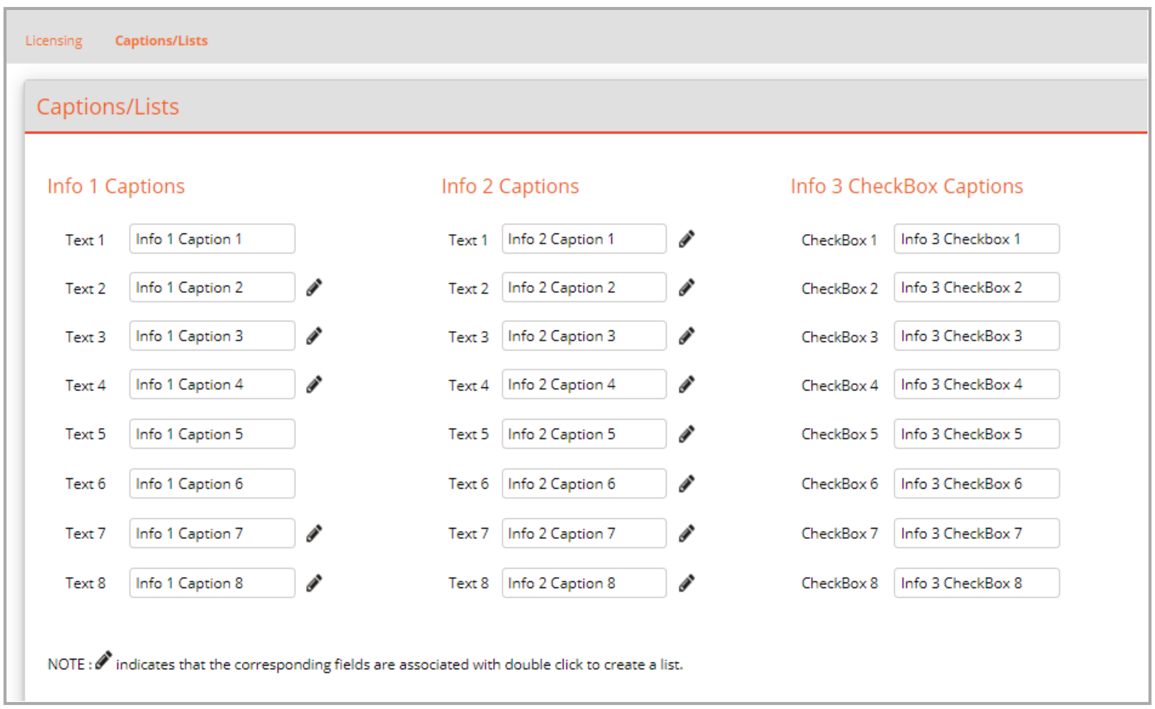
Fee Assessment Rules

Use this page to set up and manage rules for fees assessed during ALP batch processing.

If you change fee codes, be sure to update these rules.

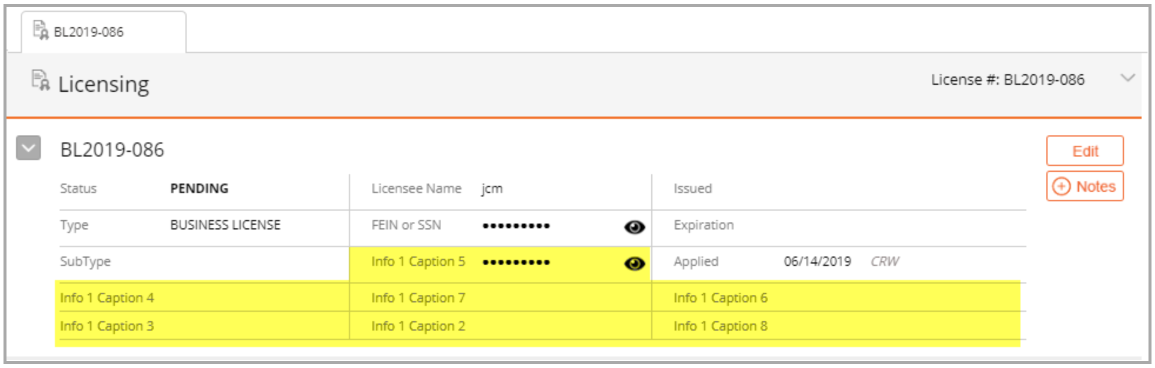
Captions/Lists

Use this page to define custom labels for select Licensing fields in Community Development.

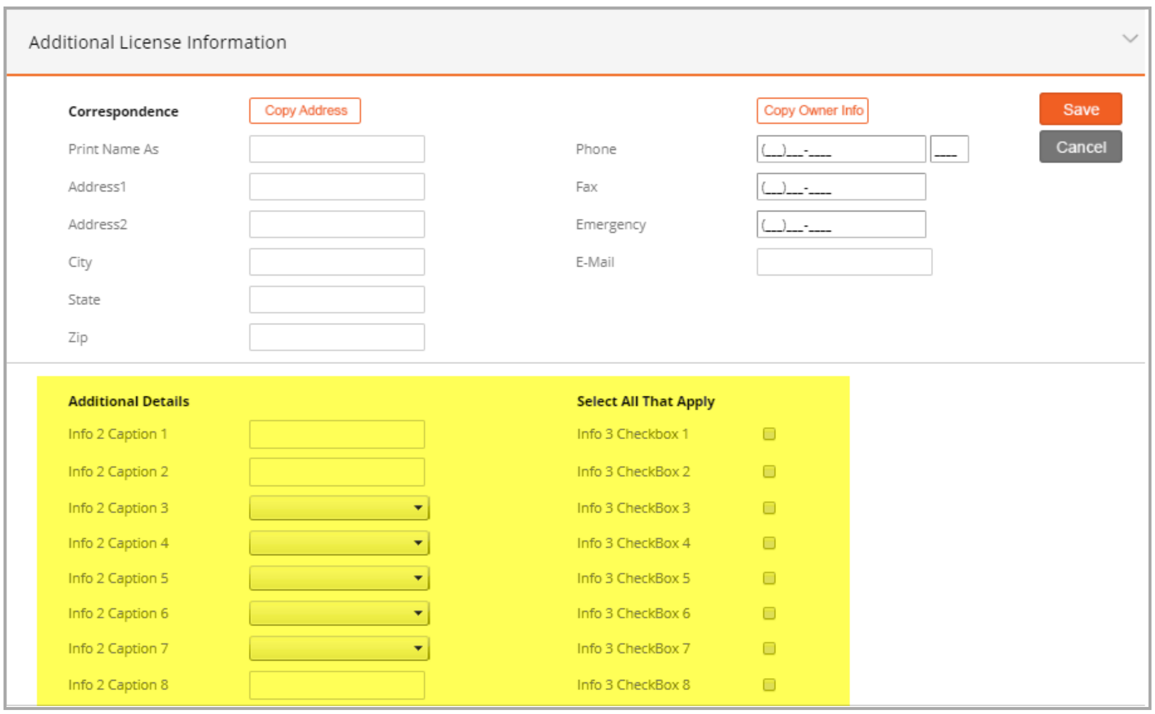


The captions you define in the **Info 1 Captions** section appear on the Licensing main information pane, as shown in the following image.

> **Note:** The **Text 1** field in the **Info 1 Captions** section is not used.



The captions you define in the **Info 2 Captions** and **Info 3 CheckBox Captions** sections appear in the **Additional License Information** pane in Community Development:



On the WUM page, fields that *do not* have next to them in the **Info 1 Captions** and **Info 2 Captions** sections are always text fields in Community Development. Fields that have next to them can be defined as text fields or drop-down lists. Fields in the **Info 3 CheckBox Captions** section are always check box fields.

To set up a drop-down list in the **Info 1 Captions** or **Info 2 Captions** section, complete the following steps:

1. Select ✎.
2. Select + to add an entry in the list.
3. Type the entry.
4. Repeat steps 2 and 3 until the list is complete.
5. Select × in a row if you need to delete an entry.
6. Select **Save**.

Departments

The Department feature provides the ability to associate a user with a specific department, a prefix with a specific department, and a record type with a specific department. This configuration enables your agency to limit a user's ability to create records associated with his/her department. For example, Building and Public Works are both using Permitting. By associating a user and a record type with a department, when the user creates a new record he or she will only be able to create records assigned to either their specific department or any record type designated as **All Departments**.

Enabling the Department feature

1. Create one or more departments.
2. Associate each user with a department. For more information about how to associate a user with a specific department, see User Names.
3. Associate a record type with a specific department or designate the record type as **All Departments**. For more information about how to associate a record type with a specific department, see Record types.
4. Associate a prefix with a specific department or designate the prefix as **All Departments**. For more information about how to associate a prefix with a department, see Adding a prefix.

Prefixes

For records in Permitting, Projects and Planning, Code Compliance, Licensing, and CRM, record number formats can contain a prefix and a sequential number. Only one record numbering format can be defined per Community Development module. The following list shows the available record number formats and examples of each format:

- Prefix only (BLD-0001)
- Prefix and year (BLD11-0001)
- Prefix and four-digit year (BLD2011-0001)
- Prefix, year, and month (BLD1101-0001)

- Year only (11-0001)
- Four-digit year (2011-0001)
- Year and month (1101-0001)
- No prefix (0001)

Record number formats are defined in **Module Configuration** > *module* > **Prefixes** or **Record Numbering**.

Defining a format for a module

1. (Optional) Select **Allow Manual Entry of Permit Number Prefix** to allow users to manually enter a prefix prior to record creation. A sequential number will still be assigned. This feature will add a prefix list item titled **User Definable**.
2. Select the record format from the list on the left and create prefixes.
3. Select the number of sequence digits (defines the number of digits in the sequential number).
4. Set the number of year/month grace days.

   Select the year or month for a new record that is created within the grace days window. For example, a department defines a format of prefix year and month with three grace days. A user creating a record on March 30, 2021 will be presented with a choice of the following Prefixes: BLD2103 or BLD2104. The Grace Days window extends this choice to the number of designated days prior to the end of the month or year and to the number of designated days after the beginning of the month or year. In the previous example, the Grace Days window would start on March 28–April 3. The default prefix is the current month.
5. Select **Rebuild Number Control**.

Adding a prefix

1. In the prefix grid, select **Add** and enter the prefix (maximum of six characters).
2. (Optional) Enter a description.
3. (Optional) Enter a department (only required if you want to limit the user's ability to select a prefix during record creation based on the user's and the prefix's assigned department).

Records

The Community Development record is the base object within each of the modules. A record can represent any definable object within your jurisdiction. Examples of records include parcels, permits, development projects, code compliance cases, licenses, or citizen complaints.

Records consist of configurable components and standard module data fields. This section describes how to add, modify, and delete the configurable components.

Records created within Permitting, Projects and Planning, Code Compliance, Licensing, and CRM have type-specific configurable components. The configurable components within Land Management and Entity Management are generic to the module.

Configurable components include:

- Record types
- Subtypes
- Valuations
- Fees
- Reviews
- Status
- Inspections
- Contacts
- Chronology
- Documents
- Custom Screens
- Preferences
- Workflow (CRM only)
- Auto Email by Type and Status (Entity Management only)
- License Types (Entity Management only)
- Job Value (Entity Management only)

Note: The following Community Development reserved words cannot be used in your configurable component titles: FEE, VOID, and PERMIT.

Record types

Record types are defined in Module Configuration.

Adding a record type

1. Go to **Module Configuration** > *module* > **Module Types** > **Types List**.
2. Select **+** and enter a name or title for the record. Record names must be unique.
3. Enter the department ownership (the default is **All Departments**). The Department Ownership feature provides the ability to limit the ability to create a record type to a single department. For more information about the Department feature, see Departments.

4. Select **Edit** if you want to limit which users, by department, can edit this record type. This feature is used in combination with Department Ownership. For example, a new record type called Work Order is created and assigned to the Public Works department. The Only Department Can Edit feature will require a user to be assigned to the Public Works department in order to edit the Work Order record. The record appears locked to users of all other departments. For more information about the Department feature, see Departments.
5. Select a default prefix. The default prefix is used when a record is created, unless it is changed by the user.
6. Select the **Only** check box if you want to restrict prefixes for this record type to the prefix you selected in the **Prefix** column. Clear this check box if you want users to be able to select a different prefix when they add records of this type.
7. Select a general ledger account number. This feature will assign the selected account number to all fees added to this record type. For information about how to add a general ledger account number, see Account Numbers.
8. Select the **eTRAKiT** check box if this record type is for an online permit, project, or license application.
9. (Optional) Select **eTRAKiT GeoType** to select one or more geotypes that the applicant can select when applying for an online permit or project.
10. (Optional) Select **eTRAKiT AECLicense** to define which license a contractor must hold in order to apply for a permit online. For more information about how to define AEC license types, see License Types for Entity Management.
11. Enter a description for the record.
12. Leave **Default Status** blank. This option is not yet implemented.
13. Reorder the type list as required.

    CRM only. To set a type as the default, move it to the first position and then select **Save**.
14. (Entity Management only) Select **Restrict** to identify Entity Management types where users will be prevented from viewing attachments. This feature is used in conjunction with the AEC: RESTRICT VIEW ATTACHMENTS privilege.
15. (Optional) CRM only. Select a default category for the record type, if required.

Record Overview

Module Configuration > *module* > Module Types > Type > Overview

Each record type contains a record overview. The overview is a listing of all of the configurable components for that particular record.

- Select **Print** for a complete list of the configurable components for the active record type.

Configurable components

Module Configuration > *module* > Module Types > Type

Configurable components are the objects that can be associated with a specific record type. Configurable components include record subtypes, contacts, fees, inspections, reviews, chronology activities, custom screens, and preferences. The majority of the configurable components are made up of lists that users make selections from.

Configurable components also include objects that can be automatically inserted into a record at the time the record is created (reviews, fees, and inspections).

Adding configurable components to a record type

This procedure applies to fees, subtypes, status, contacts, and valuations.

1. Expand the record's configurable components list.
2. Select the title of the component to configure.
3. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

   Configurable components master lists are also available within the module after the record type list.
4. If an item within a configurable component does not exist, select **Add** to create a new item. This action will add the component to both the type- or subtype-specific list and the master list.

   At a minimum, the Contacts configurable component should include the OWNER contact type. If this contact type is not included, the OWNER information from Land Management is not copied to the record.
5. **Prevent eTRAKiT Payment**: Select this check box for a status to prevent payments in eTRAKiT for permits or projects with this status. This feature is available in Permitting and Projects and Planning only, on the **Types** > *type* > **Status List** page.

   If you choose to use this feature in WUM, you must make the following selections in eTRAKiT Administrator:

   - For permits, select the **Skip Processing(In WUM)** check box in the eTRAKiT Administrator **Permitting** preferences > **Application** tab > **Payment** section.
   - For projects, select the **Skip Processing(In WUM)** check box in the eTRAKiT Administrator **Projects and Planning** preferences > **Application** tab > **Payment** section.

Auto-inserting configurable items

Reviews, fees, and inspections can be automatically added to a record based on either the record type or record subtype.

Auto-insert a review, fee, or inspection by record type:

1. Expand the record type.
2. Select the object to auto-insert (review, fee, or inspection).
3. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.
4. Select **Save**.

Auto-insert a review, fee, or inspection by record subtype:

1. Expand the record type.
2. Expand the record subtype.
3. Expand the specific subtype where you want to insert the review, fee, or inspection.
4. Select the object to auto-insert (Auto Fees, Auto Inspections, Auto Reviews).
5. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.
6. Select **Save**.

Chronology

The Chronology configurable component provides the ability to present a subset of the master chronology list based on the record type.

Create a subset of the master chronology list for a specific record type:

1. Expand the record's configurable components list.
2. Expand the record type.
3. Select **Chronology**.
4. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

   Configurable components master lists are also available within the module after the record type list.
5. If an item within a configurable component does not exist, select **Add** to create a new item. This action will add the component to both the type-specific list and the master list.

Auto Email by Status

Use this feature to send an email automatically based on changes to a record's status. Community Development sends an automatic email when the record is added with a status matching the auto email status, or when the status is changed to an auto email status by a user manually or by the Community Development API. Emails are not sent if the status is changed by a form or report.

You can set up automatic emails by status for:

- In Permitting: permit types, reviews
- In Projects and Planning: project types, reviews
- In Code Compliance: case types
- In Licensing: license types, reviews

To configure Community Development to send emails automatically based on status changes, complete the following steps:

1. Set up Community Development’s email feature if it is not already set up. For more information about the email feature, see the Email section.
2. Create the email templates by following the procedures in Adding an email template.
3. In WUM Module Configuration, go to the module and grouping you want to work with. For example, if you want to set up automatic emails for a permit called *Roof*, go to **Permitting** > **Permit Types** > **Roof**. If you want to set up automatic emails for permit reviews, go to **Permitting** > **Reviews**.
4. Select **Auto Email by Status**.
5. In the **Email From** field, type the email address you want the recipient to see as the sender of the email. For example, you might use a general email address such as permits@myagency.com, or you might use the email address of a specific person at your agency.
6. Select **+**.
7. For reviews, select the review type in the **Review Type(s)** column.
8. In the **Status** column, select the status that triggers the email to be sent.
9. In the **Email Template** column, select the email template to use.
10. In the **Email Address(es)** column, type an email address or type a contact type in brackets. For example, type **[applicant]** to send the email to the email address defined for the applicant.

    To send the email to multiple recipients, type a semicolon (;) between recipients. For example, type **[owner];ann.green@example.com** to send the email to the email address defined for the owner and also to a person with email address ann.green@example.com.

11. Select **Save**.

To change an existing automatic email rule, select the field you want to change in the listing. Select or type the new field value and then select **Save**.

To delete an existing automatic email rule, select × in the row you want to delete. Select **Save**.

Workflow (CRM only)

Module Configuration > CRM > Issue Types > Type > Workflow

Use the Workflow feature to automatically generate actions when the status of a CRM record changes. Actions include the ability to send or generate template-based emails or letters; or create a new linked record (permit, project, or code compliance case).

You can assign a maximum of five actions to a status.

Defining which status marks the record as completed

Complete the following steps:

1. Go to **Module Configuration** > **CRM** > **Issue Types** > *type* > **Workflow**.
2. Select **This Status Marks Issue as Completed** for one or more status values. This feature is used in conjunction with the **Issues are locked** check box on the **CRM Preferences** page.

Sending an email automatically

1. Select **Add/Edit Action** ⚙.
2. Select the **New** tab.
3. Select **Send**.
4. Select **Email** (default).
5. In the **To** field, select **User**, **Complainant**, or **Subject of Cmplnt**:
   - **User** provides the ability to send an email to one or more Community Development users (select **Assign Issue to User (first selected)** to indicate that the first user selected is also the default user for the record).
   - **Complainant** and **Subject of Cmplnt** provide the ability to insert the name and email address from the respective sections of the CRM record.
6. Select the email template from the **Using Template File** list. For information about how to create email templates, see Adding an email template.
7. (Optional) Select **Prompt before doing action** to allow users to confirm or cancel the action prior to completion.

Generating a letter automatically

1. Select **Add/Edit Action**.
2. Select **New**.
3. Select **Send**.
4. Select **Letter**.
5. Select **User**, **Complainant**, or **Subject of Complaint**. **Complainant** and **Subject of Complaint** provide the ability to insert the name and address from the respective sections of the CRM record.

   User provides the ability to automatically assign the record to a specific Community Development user. To assign the issue, select **Assign Issue to User (first selected)** and select the user from the user list.
6. Select the email template from the **Using Template File** list. For more information about how to create a letter using Community Development merge documents see Merge Documents.
7. Select **Prompt before doing action** to allow users to confirm or cancel the action prior to execution.

Adding a permit, code compliance case, or project automatically

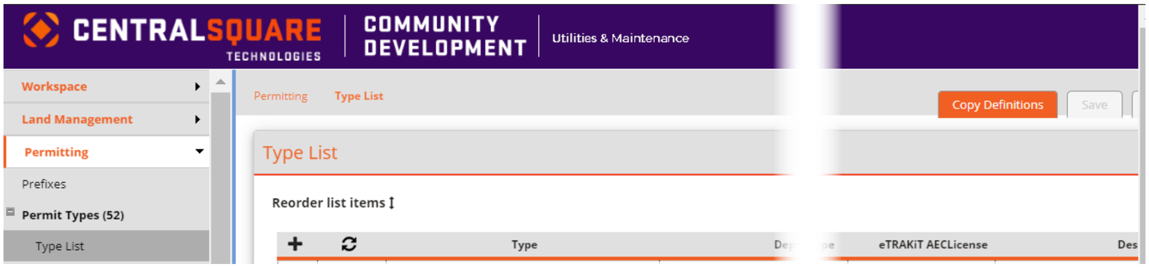
1. Select **Add/Edit Action**.
2. Select **New**.
3. Select **Create**.
4. Select **Permit**, **Violation**, or **Project**.
5. Select the prefix.
6. Select the type.
7. Select **Prompt before doing action** to allow users to confirm or cancel the action prior to execution.

   Use **No Action** to indicate the last action based on the current status.

Copy Definitions feature

Use this feature to copy existing components from one record type to another. For example, you can copy status values and inspection types from a *new roof* permit to a *reroof* permit, or copy subtypes and contact types from a commercial landscape permit to a residential landscape permit.

Copy Definitions is available at the top of the **Type List** pages in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management. The **Copy Definitions** button appears next to the **Save** button.



Copied definitions will *append* all existing attributes except **Custom Screens**. When records are appended, all items in the copy-from record are added to the copy-to record, even if the same item already exists. For custom screens, the existing screens are removed and screens from the copy-from record are added.

To copy component definitions:

1. Go to **Module Configuration** > *module* > *record* **Types** > **Type List**.
2. Select the **Copy Definitions** button.
3. From the **Copy Definition FROM** drop-down list, select the record type you want to copy from. For example, in Permitting, select the permit type.
4. In the **Definition to be Copied** list, select the types of components you want to copy from the record type selected in **Copy Definition FROM**. For example, select **Status Codes**, **Contact Types**, and **Custom Screens**.
5. In the **Copy Definitions to** list, select the record types you want to copy components to.
6. Select **Save**.

System preferences by record type

Permitting provides the ability to define system preferences at the record type level.

To enable or disable a system preference:

1. Open **Module Configuration** > **Permitting** > **Permit Types** > *permit type* > **Preferences**.
2. Select **Triggers**, **Restrictions**, or **Date Settings**.
3. Confirm that you want to add type-specific preferences.
4. Select or deselect preferences as required.

Note: Any preference enabled or disabled in this section applies only to this specific permit type.

For an explanation of the specific preferences, see Permitting.

To remove type-specific system preferences:

1. Open **Module Configuration** > **Permitting** > **Permit Types** > *permit type* > **Preferences**.
2. Select **Triggers**, **Restrictions**, or **Date Settings**.
3. Select **Revert** on the toolbar.
4. Confirm the removal of the type-specific preferences.

System preferences by record type (Code Compliance only)

For the Code Compliance module, you can define the following system preferences at the record type level.

The **Hide Chronology** and **Hide Contacts** features provide the ability to hide or remove from the view the chronology or contacts panel except for the designated department.

To define the department that can view either the **Chronology** or **Contacts** pane, select the department from the drop-down list.

Master Subtypes list

Add an item to the master Subtypes list:

1. Select **Add** and enter a title.
2. (Optional) Reorder the list.

To delete an item from the Master Subtypes list, select **Delete**.

Master Status list

Add an item to the master Status list:

1. Select **Add** and enter a status.
2. (Optional) Select **Parcel Lock** if you want the status to lock the attached Land Management record.
3. (Optional) *CRM only.* Select a CRM status. This feature is used when a CRM issue is linked to permit, project, or code compliance record and you want to automatically change the CRM status when a specified permit, project, or code compliance status is selected.

To set a status as the default, move it to the first position and select **Save**.

4. Reorder the list.

To delete an item from the Master Status list, select **Delete**.

Master Categories list (CRM only)

Module Configuration > CRM > Categories

Add an item to the CRM Categories list:

1. Select **Add** and enter a title.
2. (Optional) Reorder the list.

To delete an item from the Categories list, select **Delete**.

Master Created Via list (CRM only)

Module Configuration > CRM > Created Via

Add an item to the Created Via list:

1. Select **Add** and enter a title.
2. (Optional) Reorder the list.

   To set the default item, move it to the first position and select **Save**.

To delete an item from the Created Via list, select **Delete**.

Master Status list (CRM only)

Module Configuration > CRM > Status List

Add an item to the master Status list:

1. Select **Add**.
2. Enter a title.
3. (Optional) Reorder the list.

To delete an item from the master Status list, select **Delete**.

Master Chronology list

Add an item to the master Chronology list:

1. Open **Module Configuration** > *module* > **Chronology** > **Chronology List**.
2. Select **Add**.

3. Enter a title.
4. (Optional) Reorder the list.

To delete an item from the master Chronology list, select **Delete**.

License Types for Entity Management

Module Configuration > AEC > License Types

This list supports the ability to associate a license type with a specific permit type. When enabled, a contractor applying online for a specific permit type must hold an associated license type.

To add an item to the Master License Types list:

1. Select **+**.
2. Enter a title.
3. Reorder the list.
4. Select **Save**.

To delete an item from the **License Types** list, select **×**.

For information about associating a license type with a permit type, see the option to set **eTRAKiT AECLicense** types.

> **Note:** License types are added to the Community Development Entity Management record in the **License Types** pane.

Job Value for Entity Management

Module Configuration > AEC > Job Value

This list supports the ability to set a maximum job value per Entity Management record.

This feature must be enabled in eTRAKiT. The eTRAKiT configuration also provides the ability to define the message that appears if an applicant exceeds the job value limit.

The maximum job value is set in Community Development on the Entity Management record in the **License Types** pane.

To add an item to the Job Value list:

1. Go to **Module Configuration** > **AEC** > **Job Value**.
2. Select **Add**.
3. Enter an amount or the word **UNLIMITED**. This amount represents the maximum job value.

UNLIMITED allows the applicant to enter any job value when applying for a permit online.

4. (Optional) Reorder the list.

To delete an item from the Job Value list, select **Delete**.

Custom Screens

Use the Custom Screens feature to design templates where users can enter jurisdictional-specific data. Custom screens are available in the following modules and functional areas:

- Land Management
- Permitting
- Projects and Planning
- Code Compliance
- Licensing
- Bonds
- Conditions
- Inspections
- Violations

You can add a maximum of nine 10-field layout screens and nine 12-field layout screens per record type. This means that any one Community Development record type can have a maximum of 18 custom screens with a maximum of 244 custom fields.

The location of the **Custom Screens** group varies by module and functional area. For most modules, custom screens options are under each record type. For example, in Licensing, select **License Types**, then select a specific license type, and then select **Custom Screens**. For functional areas, select the module, then the functional area, then the **List** page. For example, to manage custom screens related to inspections in Permitting, select **Permitting**, then **Inspections**, and then select **Inspections List**.

Defining custom screens requires two steps:

1. Adding data fields
2. Designing a custom screen

Adding data fields

To add a data field, complete the following steps:

1. If you are adding a data field to a module record type: In the navigation pane, select **Types**, select a specific record type, select **Custom Screens**, and then **Data Fields**. For example,

select **Permitting** > **Permit Types** > **Plumbing** > **Custom Screens** > **Data Fields**.

If you are adding a data field to a functional area: In the navigation pane, select the functional area and then the **List** page. For example, select **Inspections** > **Inspection List**.

2. For functional areas only, select the icon in the UDF column.
3. Select **+**.
4. Enter a data field name. Adhere to the following rules when entering field names:
   - Enter a maximum of 24 characters.
   - Use only a–z, A–Z, 0–9, and the underscore (_) character (other characters, including space, are not allowed).
   - Do not start a name with a number.
   - Do not use spaces. If the field name is more than one word, you must place an underscore (_) between the words (for example, DEFAULT_INSPECTOR).
5. Select the field type. The options are:

   TEXT: Alphanumeric data, including special characters. Maximum 8000 characters.

   DATE: Date, which users can select from the calendar icon on the custom screen. Date and time data from January 1, 1753, through December 31, 9999 is valid, with an accuracy of three-hundredths of a second, or 3.33 milliseconds.

   INTEGER: Integer (whole number) data from -2^31 (-2,147,483,648) through 2^31 - 1 (2,147,483,647).

   FLOAT: Floating precision number data with the following valid values: -1.79E + 308 through -2.23E - 308, 0 and 2.23E + 308 through 1.79E + 308.

   MEMO: Text field that stores data that exceeds 2000 characters in length in the MEMOS table (for example, permit_memos, project_memos, or case_memos). Use this field type for text fields that exceed the 8000 character maximum or when you want the data to show in a notes or memo window instead of a text box.

   BOOLEAN: Check box. Data is stored in Community Development as a 0 or 1.

   Tip: If you anticipate using a Boolean field in a report or merge document and you do not want the data to show as 0 or 1, use a text field that has an associated drop-down list (Yes or No) instead.
6. For text fields, set the **Size** field to the maximum number of characters you want to allow in the field. The default for text fields is 60 characters.
7. Select **Save**.

Warning: If you delete a custom screen field, Community Development deletes the associated data.

Designing a custom screen

To add a custom screen, complete the following steps:

1. Select **Add Custom Screen**.

   Tip: If a record type already has 18 custom screens, the **Add Custom Screen** button does not appear.

2. Select the custom screen layout. Community Development enables you to create a custom screen with either 10 or 12 fields.

   A record type can have a maximum of nine 10-field layout screens and nine 12-field layout screens.

3. In the **Screen Label** field, type a title for the custom screen.

   If you want the screen to be available to citizens online, type **eTRAKiT** as the first word in the title.

4. For each data field on the screen:
   - Enter a caption. The **Caption** field size is 24 characters.
   - Select the Database Field Name. Custom fields are located at the bottom of the list and have the number 2. in front of the field name (for example, 2.COAST_ZONE).
   - Use ▼ and ▲ to arrange the order of the fields.

5. Select from the following options as required by your agency's procedures:
   - Select **Read Only** for data that is for information only.
   - Select **Options** to create a pick list or autogen number.

Create a pick list:

1. Select **Options** next to the field.
2. Select **Pick List**.
3. Select **+**.
4. Type the text for the drop-down list item.
5. Repeat as needed.

   Tip: To reorder the list, drag a row to a different position.

6. Select **OK**.

Tip: To create multiple drop-down lists, enter the items separated by commas and save.

Create an autogen (automatically generated) number:

1. In **System Settings**, add the auto-generated number.
2. In the navigation pane, select **Module Configuration** > *module* > **Types** > **Custom Screens**, and then select the custom screen you want to work with.
3. Select ⚙ for the field you want to work with.
4. Select **AutoGen**.
5. In the unlabeled drop-down field, select the title of the autogen number you added in step 1.
6. Select **Save**.

Tips:

- To remove or clear a field definition, select **Reset Data Field**.
- Deleting a custom screen removes the screen only. Deleting a custom screen does not delete the associated field or the associated data.
- Contractor passwords are not viewable from the **Company Information** pane unless the System Administrator adds it as a custom screen. Users can view and edit contractor passwords once they are added as a custom screen.

Valuations

Valuations stores and manages the information required to calculate and track the job value of a record in Permitting. Once valuations are set up, they must be associated with specific Permitting record types. Set up valuations using the following procedures:

- Adding a valuation
- Editing valuations
- Deleting valuations

Adding a valuation

1. Open **Module Configuration** > **Permitting** > **Valuations**.
2. Select **Add**.
3. Enter a valuation code (maximum 12 characters). Valuation codes must be unique.
4. Enter a description of the valuation calculation (maximum 40 characters).
5. Enter a unit cost.
6. Select the unit of measure from the **Units** drop-down list.
7. (Optional) If the valuation is a subvaluation, select the valuation category from the

Sub-Valuation of drop-down list.

8. Associate the new valuation(s) with specific permit type(s), as applicable.

Add a valuation category

1. Open **Module Configuration** > **Permitting** > **Valuations**.
2. Select **Add**.
3. Enter a valuation code (maximum 12 characters). Valuation codes must be unique.
4. Enter a category title in description (maximum 40 characters).
5. Select **DET** from the **Units** drop-down list.

Tip: Double-click a valuation in the master list to edit the properties.

Valuation Options

- **Expand Valuation Schedule tree when inserting New Valuations**: This preference will automatically expand each node in the valuation schedule when the user opens the valuations schedule screen.
- **Enable Model Home Templates**: This preference enables functionality or streamlining user workflow with model home permits and projects using model home templates. Templates are configurable according to builders, models, and base and optional valuations.

1. Select preference to enable functionality.
2. Create new valuations by selecting **Add** and entering the valuation code, description, unit cost, units (EA), and subvaluation (if any) and then selecting **Save**. Units must be specified as **EA** to be used with the Model Home Template feature.

Tip: Additional Administrator options for setup (Configure Model Homes & Admin Options) are available in the Community Development interface on the **Valuations** pane. Instructions for use are included in the *Community Development User Guide*.

Fees

The **Fees** pages store information used to calculate, assess, and collect fees and deposits in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management. After you set up fees, the fees must be associated with specific record types in Permitting, Projects and Planning, and Code Compliance.

Depending on your agency's requirements, you might need to set up account numbers, lookup tables, and stored fee formulas before you set up fee schedules and fees. You should also review fee preferences. Refer to the following sections for more information:

- Account Numbers
- Lookup tables
- Adding fee formulas
- Fee preferences

Fee schedules

A fee schedule defines a group of fees that are available in Community Development. In each fee schedule, you can add multiple fees and test or validate fee formulas. Your agency can set up multiple fee schedules, but only one fee schedule can be active. The following options determine which fee schedule is active:

- **Effective On**: Select the date this fee schedule will begin to be applied to Community Development records.
- **Test**: Select this check box for fee schedules that are not currently in effect. Clear this check box for the active fee schedule or schedules that are tested and ready for use as of the effective date.

> **Tip:** The active fee schedule is the fee schedule with the most recent **Effective On** date not in the future and the **Test** check box cleared. If two fee schedules have the same effective date and both have the **Test** check box cleared, the fee schedule that was assigned that date first will be used.

Use the **Fee List** page to add, modify, or delete fee schedules and define fees in a fee schedule. At the top of the page, the **Schedule Name** drop-down list shows fee schedules you added previously.

Refer to the following sections for detailed procedures:

- Adding a fee schedule
- Fee definitions
- Adding fee formulas
- Editing a fee schedule name
- Deleting a fee schedule

Adding a fee schedule

1. Go to **Module Configuration** > *module* > **Fees** > **Fee List**.
2. Select **+** next to the **Schedule Name** field.

3. Type a schedule name for the new schedule.
4. From the **Copy Existing Schedule** drop-down list, select the name of the fee schedule to copy.
5. Select **Save**.
6. In the **Effective Date** field, enter the date Community Development will begin using the fee schedule.
7. Select the **Test** check box for fee schedules that are not ready to go into effect. Clear this check box for the active fee schedule.
8. Add or change fees as needed in the fee listing. For more information about fee settings, see Fee definitions.
9. Select **Save**.

Note: This action adds a fee schedule for all Community Development modules. Community Development can have only one *active* fee schedule. The active fee schedule is the fee schedule with the most recent **Effective On** date not in the future and the **Test** check box cleared.

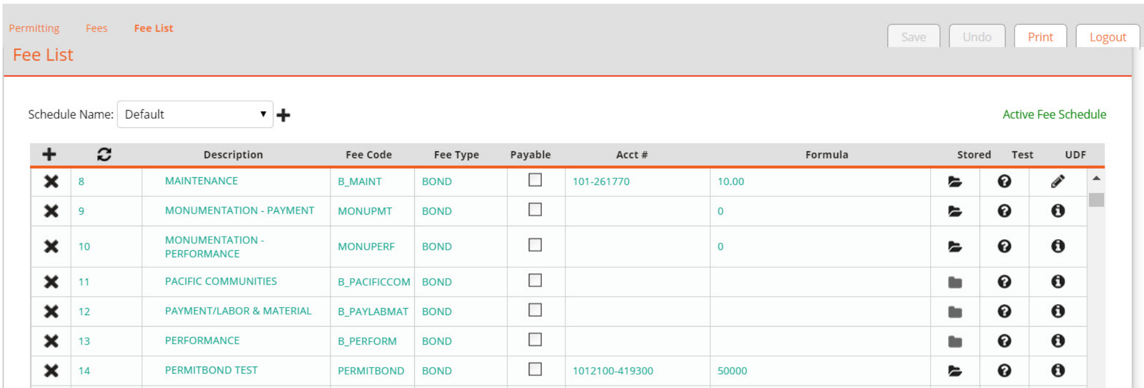
Fee definitions

You can add multiple fees to each fee schedule you set up. From the **Fee List** page, you can add, view, and modify fee definitions.

Tip: CentralSquare recommends that you set up your standard account numbers, lookup tables, and stored fee formulas before creating fees. Refer to the following sections for more information:

- Account Numbers
- Lookup tables
- Adding fee formulas

The fee schedule listing includes the following settings and functions for each fee:



- **Description**: Short explanation of the fee. This description is the fee title you see in Community Development.
- **Fee Code**: Unique identifier for the fee. The fee code can include letters and numbers.
- **Fee Type**: Type of fee. Select **FEE**, **DEPOSIT**, **BOND**, or **BOND-SPECIFIC**.

  If you select **BOND**, you can add the fee from the **Bonds** pane in Community Development.

  Fees designated as **BOND-SPECIFIC** are treated as fees, not bonds—they do not have any of the additional properties that a bond has, such as UDFs, notes, or contacts. The **BOND-SPECIFIC** fee type is used solely as a tag for reporting.
- **Payable**: Payable by deposit option. Select this check box to allow this fee to be paid by deposits. Clear this check box if you do not want to allow this fee to be paid by deposits.
- **Acct #**: Your agency's internal account number associated with this fee. This field might be required depending on your agency's settings in **System Settings** > **Accounting** > **Fees**.
- **Formula**: Formula used to calculate the fee. Type the formula you want to use to calculate the fee. Or, if the fee is a set amount, type the amount. For more information about formulas, see Adding fee formulas.
- **Stored**: Stored formula icon and link. *Stored formulas* are formulas saved in a text file, typically because they are very long. An open folder icon in this column indicates a formula is assigned to this fee. A closed gray folder icon indicates no formula is assigned. Select the icon to add or edit the formula.
- **Test**: Test formula link. Select in this column to test and validate the formula you entered in the **Formula** column.
- **UDF**: Link that opens the Bonds Custom Screens editor. For bond fee types, appears in this column if you set up custom screens for this fee or appears in this column if you have not set up custom screens. Select the icon to open the **Custom Screens—BONDS—UDF** dialog box. This column is blank for all other fee types.

Adding a fee

1. Go to **Module Configuration** > *module* > **Fees** > **Fee List**.
2. In the fee listing, select **+**.
3. In the dialog box, complete the following fields:
    - **Item Type**: Select the type of fee. The options are **FEE**, **DEPOSIT**, **BOND**, or **BOND-SPECIFIC**. If you select **BOND**, you can add the fee from the **Bonds** pane in Community Development.

      Fees designated as **BOND-SPECIFIC** are treated as fees, not bonds—they do not have any of the additional properties that a bond has, such as UDFs, notes, or contacts. The **BOND-SPECIFIC** fee type is used solely as a tag for reporting.
    - **Payable by Deposit**: Select this check box to allow this fee to be paid by deposits. Clear this check box if you do not want to allow this fee to be paid by deposits.
    - **Code**: Type a unique identifier for the fee. The fee code can include letters and numbers.
    - **Description**: Type a short explanation of the fee. This description is the fee title you see in Community Development.
    - **Account Number**: Select your agency's internal account number associated with this fee. This field might be required depending on your agency's settings in **System Settings** > **Accounting** > **Fees**.
    - **Sub Fees of**: If you are adding a subfee, select the parent fee.
    - **Formula**: Type the formula you want to use to calculate the fee. Or, if the fee is a set amount, type the amount.

      For more information about formulas, see Adding fee formulas.
4. If you selected **BOND** in the **Item Type** field, complete these additional fields:
    - **Minimum Percent reduction**: Type the minimum percentage a bond can be reduced.
    - **Max Reduction in 12 months**: Enter the maximum bond reduction that can occur within a 12-month period.
    - **Bond Explanation**: Select a bond explanation. Bond Explanations are PDF files that can be linked to a specific bond. These files are stored in //*file server*/bin32.
    - **Create bond inspection 90 days prior to bond expiration**: Select or clear this check box as needed.

    To view or set up custom screens for bonds, select **Bond Custom Screens**. Add or modify custom screens and then select **Save**.
5. Select **Save**. The fee appears in the fee listing.
6. Select **Save** on the **Fee List** page.

Adding fee formulas

Fee formulas determine how a fee amount is calculated in Community Development. Fee amounts can be entered by users; assessed as flat fees; based on custom screen fields, tiered rate schedules, other fees, or subfees; or established as a minimum or maximum for a record, as a truncated value, or as a variable described by the user after the fee is created.

Fee formula elements

The following table lists common fee elements and how they can be used.

Formula element	Description	Use case example	Formula example
Mathematical operations	Standard math symbols for addition (+), subtraction (−), multiplication (*), and division (/).	See examples in this table.	
Manual amount	User-defined fee amount entered manually when the fee is added to a record.	The fee for copies from microfiche is an administrative hourly fee plus the actual cost of the copies.	Leave the formula blank.
Flat fee	Static amount.	The fee to issue a Certificate of Occupancy is always $50.	50
QTY	Variable for a quantity that you enter manually when the fee is added to the record.	The fee for an electrical inspection is $1.05 per outlet. When the fee is added to the record, you must enter the number of outlets in the **QTY** field.	QTY * 1.05

Formula element	Description	Use case example	Formula example
Fee lookup table	Variable for the value defined in the specified field in the specified lookup table. For more information about lookup tables, see Lookup tables.	The plan check fee is 65% of the building fee. The lookup table is BLDGFEE, which bases the fee amount on the BLDGSF field.	[BLDGFEE] * 0.65
MIN	Function that evaluates to the lesser of two specified values. Each value can be a variable (such as QTY) or a flat amount.	The fee is the value of QTY or 15, whichever is less.	MIN(15,QTY)
MAX	Function that evaluates to the greater of two specified values. Each value can be a variable (such as QTY) or a flat amount.	The fee is the value of QTY or 15, whichever is greater.	MAX(15,QTY)
INT	Function that truncates a decimal to a whole number (evaluates to the floor of the decimal). The decimal value can be manually entered, from a field, or calculated.	For a fire hazard inspection fee, you want to charge a whole dollar amount that is 2% of the total job value, rounded down. If the job value is $172,810.46, the fee evaluates to $3,456.	INT(JOBVALUE * 0.02)

Formula element	Description	Use case example	Formula example
ITEMIZE	Function that sums associated subfees. **Note:** Use this function on its own without any other calculations in the formula.		[ITEMIZE]
Fee code	Function that sums all fees with the specified fee code on the record.	You want to charge a fee that is 20% of the total of all deposits on the record. The fee code for a deposit is DEPOSIT.	{DEPOSIT} * 0.2
MINIMUM	Function that evaluates to the difference between the total amount of all fees on the record and a specified minimum fee amount. If the total fees on the record is greater than the minimum amount, this fee evaluates to 0 (no additional fee is charged). If the total fee amount is less than the minimum amount, the difference between the minimum and the total is charged.	You specify that the total amount of fees for permits must be $100. A permit has total fees of $55, excluding this fee. This fee evaluates to $45 to meet the minimum. A permit has total fees of $120, excluding this fee. Because $120 is more than the minimum, the record is not charged an additional fee.	[MINIMUM:100]

Formula element	Description	Use case example	Formula example
MAXIMUM	Function that evaluates to the difference between a specified maximum fee amount and the total amount of all fees on the record. If the total fees on the record is less than the maximum, this fee evaluates to 0 (no additional fee is charged). If the total fee amount is greater than the maximum, the difference between the total and the maximum is charged.	You specify that the total amount of fees for permits must be $100. A permit has total fees of $55, excluding this fee. This fee evaluates to 0 (no additional fee is charged) because the total fees amount does not exceed the specified maximum. A permit has total fees of $120, excluding this fee. This fee evaluates to −$20, which reduces the total amount of fees to the $100 maximum.	[MAXIMUM:100]
Custom screen field	Variable that represents the value from a specified custom field. The custom field must be of type integer or float. **Note:** If the field does not exist or is not applied to the specific record type, the variable is replaced with 0. For more information about custom screens, see Custom Screens.	The landscaping plan review fee is 15% of the number of acres of the property. The housing development plan check fee is a flat fee of $1300 plus an additional $100 per lot. The custom screen field for number of lots is NO_LOTS.	ACRES * 0.15 1300 + (NO_LOTS * 100)

Formula element	Description	Use case example	Formula example
JOBVALUE	*Permitting only.* Function that sums a permit's valuation items.	An engineering plan check fee is 10% of a permit's total job value.	JOBVALUE * 0.1

Additional examples

For an electrical inspection, the fee is based on the number of wall switches at a graduated rate. The first 10 switches are charged a rate of $1 each. Additional switches are charged $0.75 each. The formula is:

(MIN (QTY,10) * 1) + (MAX (QTY − 10,0) * 0.75)

For an electrical inspection, the fee is based on the number of wall switches at a graduated rate *with a minimum fee*. The first 5 switches are charged a flat rate of $10. Additional switches are charged $0.75 each. The formula is:

10 + (MAX (QTY − 5,0) * 0.75)

For an electrical inspection, the fee is based on the number of wall switches at a graduated rate *with a maximum fee*. Switches are charged at a rate of $0.75 each, with a maximum fee of $15. The formula is:

MIN((QTY * 0.75),15)

A plan check fee is based on a percentage of other fees: 75% of the sum of electrical, mechanical, and plumbing fees (fee codes ELEC, PLUMB, and MECH). The formula is:

({ELEC} + {PLUMB} + {MECH}) * 0.75

Editing a fee schedule name

1. Go to **Module Configuration** > *module* > **Fees** > **Fees List**.
2. Select the fee schedule from the **Schedule Name** list.
3. Select **Edit** next to **Schedule Name**.
4. Enter the new name and select **Save**.

Deleting a fee schedule

1. Go to **Module Configuration** > *module* > **Fees** > **Fees List**.
2. In the **Schedule Name** list, select the fee schedule you want to delete.

3. Select **+** next to the **Schedule Name** field.
4. Select **OK** to confirm.

Lookup tables

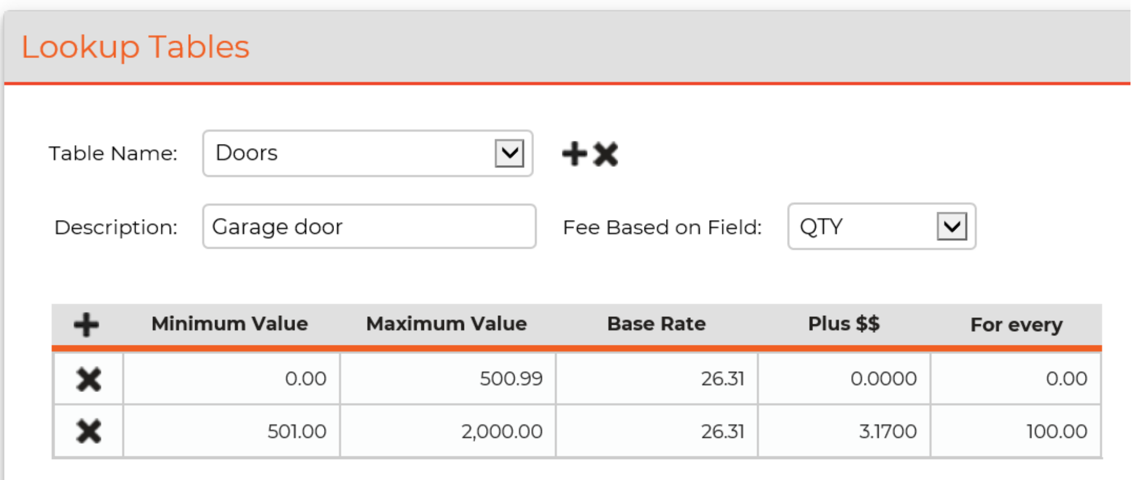
Lookup tables define tiered rates for fees based on a field such as square feet or job value. Each tier (row) in the table defines the base rate and additional amount to charge for the tier.

Understanding lookup tables

Lookup tables are designed based on language written by the building code governing bodies. Here is an example of this language:

$26.31 for the first 500, plus $3.17 for each additional 100, or fraction thereof, to and including 2000.

This building code language translates to a lookup table like the one shown here:



	Minimum Value	Maximum Value	Base Rate	Plus $$	For every
✖	0.00	500.99	26.31	0.0000	0.00
✖	501.00	2,000.00	26.31	3.1700	100.00

The building code language corresponds to the following headings in the lookup table:

- **Minimum Value** and **Maximum Value**: Value range of the basis (based-on) field for the tier.
- **Base Rate**: Flat amount to charge when the basis field value falls in this tier.
- **Plus $$**: Additional amount to charge when the basis field value falls in this tier, based on the number of units in the **For every** column.
- **For every**: Number of units used to determine the multiplier for the **Plus $$** amount.

In this example, when the basis field value falls between 0 and 500.99, the base rate of $26.31 is charged. Because **Plus $$** and **For every** are 0 for this tier, no additional amount is charged.

When the basis field value falls between 501 and 2000, the fee equals the base rate of $26.31 plus the additional amount based on **Plus $$** and **For every**. The additional amount is calculated in three steps:

basis − **Minimum Value** = Difference from minimum

Floor(Difference from minimum / **For every**) + 1 = Multiplier

Multiplier * **Plus $$**

The building code example states "…plus $3.17 for each additional 100, *or fraction thereof…*" so the calculation adds 1 to the multiplier to account for the fraction.

When the basis field value is greater than 2000, no fee is charged because no tier is defined for values greater than 2000.

Here are more detailed examples using the lookup table above:

Quantity	Base rate	Difference from minimum	Multiplier for the additional amount	Formula	Fee amount
0	$26.31	Not applicable because this tier does not include an additional amount (**Plus $$** and **For every** are 0)		$26.31 + ($3.17 * 0)	$26.31
200	$26.31	Not applicable because this tier does not include an additional amount (**Plus $$** and **For every** are 0)		$26.31 + ($3.17 * 0)	$26.31
501	$26.31	501 − 501 = 0	0 + 1 = 1	$26.31 + ($3.17 * 1)	501
601	$26.31	601 − 501 = 100	Floor(100/100) + 1 = 2	$26.31 + ($3.17 * 2)	601
750	$26.31	750 − 501 = 249	Floor(249/100) + 1 = 3	$26.31 + ($3.17 * 3)	750
2000	$26.31	2000 − 501 = 1449	Floor(1449/100) + 1 = 15	$26.31 + ($3.17 * 15)	2000
2001	Not defined	$0			2001

Unless **For every** is 0, the fee charged when the value equals the **Minimum Value** is not equal to the **Base Rate**. At the **Minimum Value**, the fee is calculated by the **Base Rate** + 1 times the **Plus $$**.

Working with lookup tables

1. Go to **Module Configuration** > *module* > **Fees** > **Lookup Tables**.
2. In the **Table Name** field, select the name of the table you want to edit. Or select **+** to add a lookup table.
3. Enter or edit the table description. This description is for internal use only.
4. In the **Fee Based on Field** drop-down list, select the field on which the fee is based or enter the custom screen field name. If you enter a custom screen field name, do not include the 2.
5. Enter values in the listing for each fee tier.
6. Select **Save**.

Fee preferences

Setting fee preferences for a module

To set fee preferences for a module, go to **Module Configuration** > *module* > **Fees** > **Preferences**. Fee preferences are available in the following modules:

- Permitting
- Projects and Planning
- Code Compliance
- Licensing
- Entity Management

Permitting

- **Prevent ISSUE before all FEES are paid**: **Issued Date** on the permit information pane is unavailable if any fee on the record has an amount greater than zero.
- **Default Contact Type for Fees Paid By**: Displays the name field from the **Contacts** pane of the selected contact type. For example, if Joe Applicant is the name listed on the APPLICANT contact type and you select **APPLICATION** in **Default Contact Type for Fees Pay By**, **Joe Applicant** will be the default name shown on fees payment screen.
- **Receipt Numbers AutoGen Name**: Defines the autogen number used on the receipt. Manually add a receipt number by selecting **<none defined>**.

- **In Valuations, use Permit building square footage as quantity when SF or SQ units selected**:
  - If you clear this check box, the number of units for EA, LF, SF, and SQ are entered into the quantity field of the valuation and stored in the quantity field in the related Valuations table. For more information about adding valuations, see Adding a valuation.
  - If you select this check box and the valuation is defined using SF or SQ as the unit of measurement, Community Development obtains and stores the unit of measurement in the BLDG_SF field located in the main table. The quantity field in the **Valuations** pane is unavailable.

    Additionally, with this preference enabled, the following fields are available: BLDG2_SF, GAR_SF, GAR2_SF, LOT_SF, PORCH_SF, PORCH2_SF, plus any user-defined float field from the Permitting module. The quantity field in the **Valuations** pane is unavailable. To use this option, add a custom screen that contains one or more of the fields. Enter the units into the custom screen, which is then used in the valuations calculations. For more information see Custom Screens.

    Warning: User-defined float fields cannot exceed a field size of 6 characters when used in calculating valuations.

    Note: Depending on your database configuration, this check box might not be available.

Projects and Planning

- **Default Contact Type for Fees Paid By**: Displays the name field from the **Contacts** pane of the selected contact type. For example, if Joe Applicant is the name listed on the APPLICANT contact type and you select **APPLICATION** in **Default Contact Type for Fees Pay By**, **Joe Applicant** will be the default name shown on fees payment screen.
- **Receipt Numbers AutoGen Name**: Defines the autogen number used on the receipt. Manually add a receipt number by selecting **<none defined>**.
- **Enable Comments field in Fees**: This option is not used.
- **Enable Comments field in Sub-Fees**: This option is not used.

Code Compliance

- **Enable Comments field in Fees**: This option is not used.
- **Enable Comments field in Sub-Fees**: This option is not used.

Licensing

- **Enable Comments field in Fees**: This option is not used.
- **Enable Comments field in Sub-Fees**: This option is not used.

- **Pro-Rate/Penalty %**: If you want to be able to prorate fees (charge less than 100 percent) or charge a penalty (more than 100 percent), set up percentages in the **Pro-Rate/Penalty %** listing. The percentages you set up appear in Community Development in the **Pro-Rate/Penalty %** drop-down list when you assess a fee.

Entity Management

- **Prompt for setting Expiration date to end of year**: Prompts user to confirm the automatic setting of the **Expires** date in the **Company Information** pane to December 31 of the current year.
- **Prompt for setting Expiration date to specific date**: Prompts user to confirm the automatic setting of the **Expires** date in the **Company Information** pane to the date selected in the preference.
- **Prompt for setting the Primary Business License Expiration to specific date**: Prompts the user to confirm the automatic setting of the **Expires** date field for the primary license in the **License Information** pane to the date selected here.
- **Enable Comments field in Fees**: This option is not used.
- **Enable Comments field in Sub-Fees**: This option is not used.

Invoicing

To enable the invoicing feature, use the options in **System Settings** > **Accounting** > **Invoices**.

If you want to use automatically generated (autogen) numbers for invoices, add an entry in the AutoGen Numbers table. See AutoGen Numbers for more information.

Cashiering Receipts

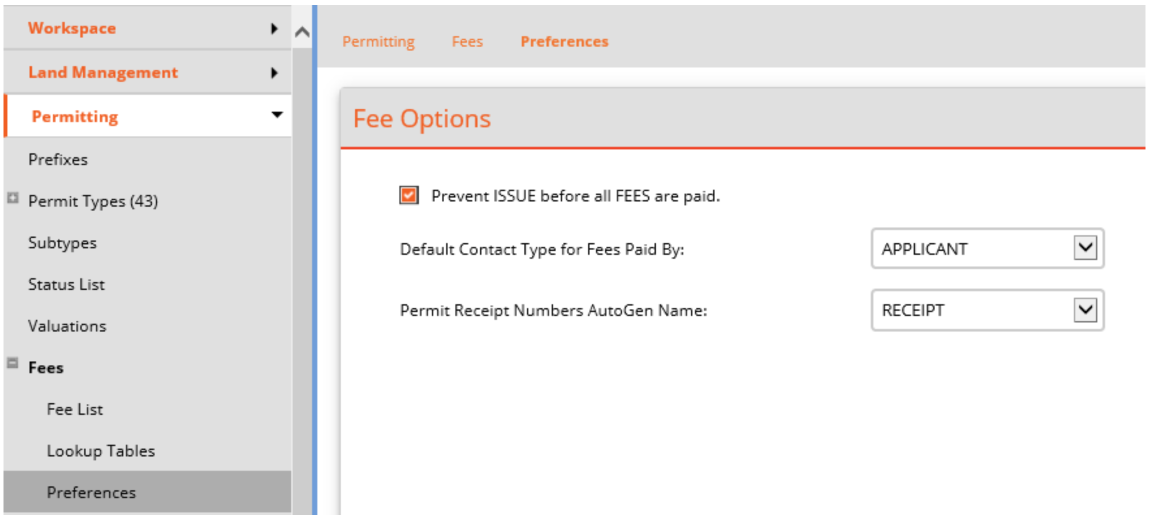
There are two types of cashiering receipts: manual entry for individual receipts and automatically generated (autogen) numbering for multiple receipts.

These options apply only if you use Community Development Cashiering.

Using manual receipt numbers

Module Configuration > *module* > Fees > Preferences

When the **Receipt Numbers AutoGen Name** option is set to **<none defined>**, you can enter a manual prefix for a receipt. This option is available in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management.



Using autogen receipt numbers

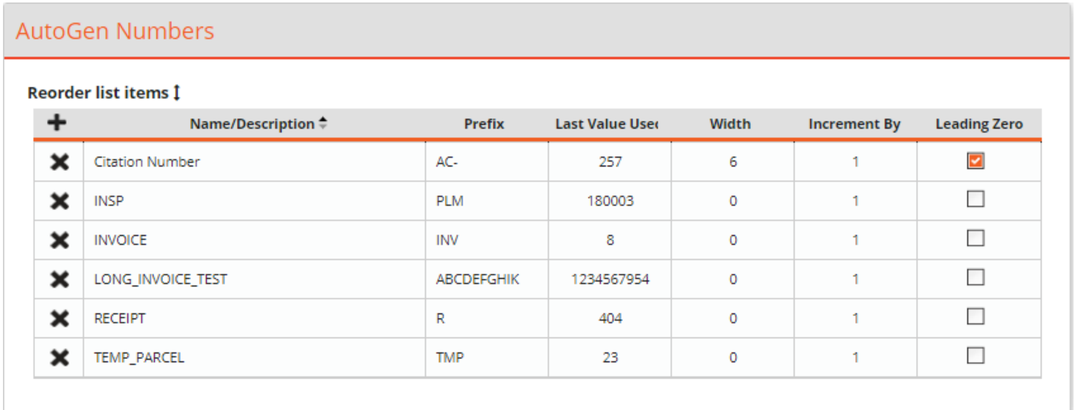
When two items from different modules are selected to be paid at the same time, the receipt number is based on Multi_Receipt settings.

Note: If you want to use this feature, cashiering must be enabled in your database.

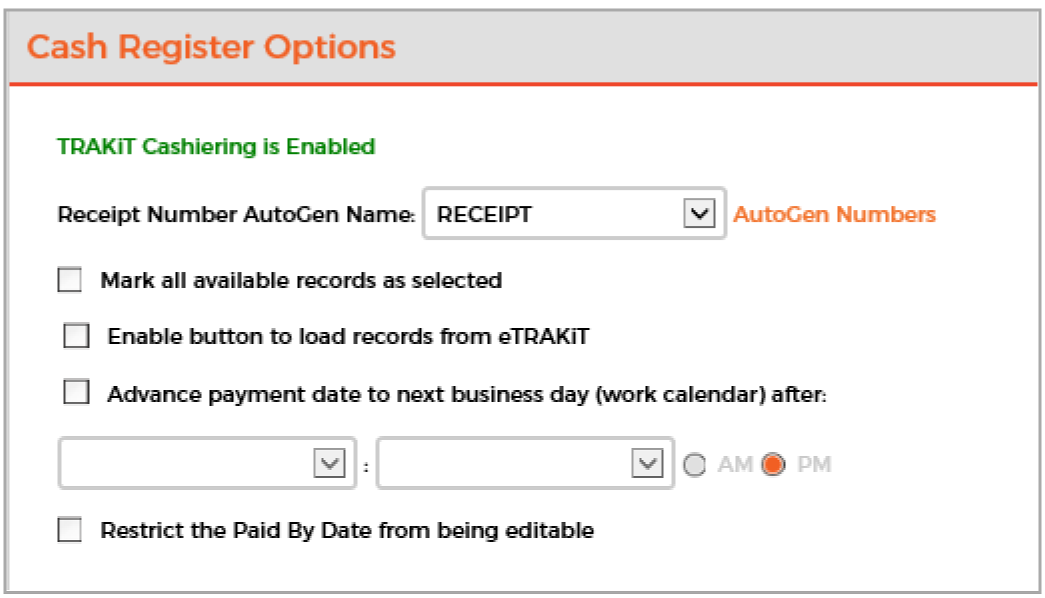
To use Multi_Receipt receipt numbering, complete the following setup:

1. Go to **System Settings** > **AutoGen Numbers**.
2. Select **+**.
3. In the **Name/Description** column, type **Multi_Receipt**.
4. Type values for the **Prefix**, **Last Value Used**, **Width**, and **Increment By** options.
5. Select the **Leading Zero** check box if you want the receipt numbers to include leading zeros.

6. Select **Save**.



7. Go to **System Settings** > **Accounting** > **Cash Register**.
8. In the **Cash Register Options** section, select **Multi_Receipt** in the **Receipt Number AutoGen Name** field.



9. Select **Save**.

Deposits

Deposits provides the capability of collecting funds on a record that can then be used to pay fees as they are incurred.

Adding deposit definitions

CentralSquare recommends that you set up standard account numbers before deposits are created.

Adding a deposit in your system setup

1. Open **Module Configuration** > *module* > **Fees** > **Fee List**.
2. Select **Add**.
3. Select **Deposit** from **Item Type**.
4. Enter a code for the deposit. The deposit code must be unique and not exceed 12 characters in length. The deposit code can consist of both letters and numbers (for example, PLANREVDEP01).
5. Enter a description (maximum of 40 characters). The description is the title of the deposit the user sees in Community Development.
6. (Optional) Select an account number.
7. Enter the deposit amount in the **Formula** field. Deposit amounts are either fixed (for example, $5,000) or manually entered by the user.
8. Select **OK**.

Note: Deposits cannot be a part of a group or have subfees.

Tips:

- Deposits appear in blue text on the fee schedule and must be associated with a specific record type in the application setup for Permitting, Projects and Planning, Code Compliance, or Entity Management (AEC).
- For more information about system settings for deposits, see Deposits.
- The deposits feature can be combined with Time Tracker to automatically create a fee that reduces or draws down the deposit as fees are incurred through the review, inspection, or chronology activity features. For more information about Time Tracker, see Time Tracker.

Bonds

Adding bond definitions

1. Open **Module Configuration** > *Permitting* or *Projects and Planning* > **Fees** > **Fee List**.
2. Select Add.
3. Select **Bond from Item Type**.
4. Enter a code for the bond. The bond code must be unique and not exceed 12 characters in length. The bond code can consist of both letters and numbers (for example, ENCRBND01).
5. Enter a description (maximum of 40 characters). The description is the title of the deposit the user sees in Community Development.
6. (Optional) Select an account number.
7. Enter the bond formula.
8. (Optional) Enter the minimum percentage a bond can be reduced.
9. (Optional) Enter the maximum bond reduction that can occur within a 12-month period.
10. (Optional) Select a bond explanation.

    Bond Explanations are PDF files that can be linked to a specific bond. These files are stored in //*file server*/bin32.
11. Select **OK**.

Note: Bonds cannot be a part of a group or have subfees.

Tips:

- Bonds appear in green text on the fee schedule and must be associated with a specific record type in the application setup for Permitting or Projects and Planning.
- For more information about system settings, see Bonds.
- Custom screens can be used to track bond-specific information. For more information about creating custom screens, see Custom Screens.

Print Queue

Print Queue defines the document(s) that are available from the Print feature in the **Bonds** pane.

To define the list of available documents, place the documents/reports that users will print in the //<*app server*>/ Documents/<*module name*>/BONDS folder.

Reviews

Reviews stores information used to track reviews in Permitting, Projects and Planning, and Licensing. Set up reviews using the following procedures:

- Adding review types
- Editing review types
- Deleting review types
- Grouped Reviews
- Reviewers List
- Status codes for reviews
- Standard notes for reviewers

Adding review types

Adding a review type

1. Open **Module Configuration** > *module* > **Reviews** > **Reviews List**.
2. Select **Add**.
3. Enter a name for this review in the **Review Name** field (maximum of 20 characters).

   Note: Review names are saved in all uppercase letters regardless of the case you enter.

4. Enter a description of this review in the **Review Description** field (maximum of 60 characters).
5. In the **Default Reviewer** field, select the name of the person you want assigned to this review type when a review of this type is added.

   You can change the default reviewer manually for individual reviews if necessary.

6. In the **Alternate Reviewer** field, select the name of the person you want to complete the review if the default reviewer is not available.

   If both the default reviewer and alternate reviewer are unavailable, the review is assigned to the alternate reviewer.

7. In the **Email Address for Alert Email if Reviewer(s) unavailable** field, enter the email address of the person to receive an email if the default and alternate reviewers are both unavailable.
8. If another review is a prerequisite to the review you are adding, select the prerequisite review type in the **Required Previous Review** field. Users cannot schedule the review until the prerequisite review is passed.

9. Enter the number of days after the review is added that the review is due in the **Default Due Date aging from 'Sent Date'** field. If you enter a value, then the review due date is set automatically when the review is added to the record. The default setting for this feature is **Calendar Days**.
10. **Exclude from Approval Trigger**: Depending on your system preferences, Community Development can automatically set a record to Approved status when all reviews are set to a certain status. To exclude this review from the record approval, select this option. To require this review for record approval, clear this check box. For more information about how to automatically set the Approved date, see Review Preferences.
11. Use fields in the **Automatic Next Review** section to specify a review that will be added automatically to the record after this review is assigned a specified status:
    a. In the **When this status is set** field, select the status that the new review must be assigned before the next reviews are added.
    b. In the **Insert this Review** field, select the review to add.
12. Select **Save**.

Setting up an automatic next review

1. Select one or more status codes to trigger the next review.
2. Select the review to insert.

Editing review types

To edit a review type, go to **Module Configuration** > *module* > **Reviews** > **Reviews List**.

You can edit the review properties directly in the listing or double-click the review you want to edit to open a dialog box, which contains more options than the listing.

Save your changes.

Deleting review types

1. Open **Module Configuration** > *module* > **Reviews** > **Reviews List**.
2. Select **Delete** next the review that you want to remove from your setup.

   If this review is automatically added to a new record, remove the review from each record type in your record's configurable components.

Grouped Reviews

To facilitate review scheduling and reporting, you can organize review types into groups such as City, County, and State or 1st Submittal and 2nd Submittal.

Adding a group

1. Go to **Module Configuration** > *module* > **Reviews** > **Grouped Reviews**.
2. Select **Add** next to the **Group** drop-down list.
3. Enter a group name (maximum of 12 characters) and then select **Save**.

Editing a review group title

1. Open **Module Configuration** > *module* > **Reviews** > **Grouped Reviews**.
2. Select the group.
3. Select **Edit** and enter the new review group name.
4. Select **Save**.

Deleting a review group

1. Open **Module Configuration** > *module* > **Reviews** > **Grouped Reviews**.
2. Select the group.
3. Select **Delete**.
4. Select **OK**.

Adding a review to a group

1. Open **Module Configuration** > *module* > **Reviews** > **Grouped Reviews**.
2. Select the group.
3. Select one or more reviews from the **Master Reviews List** and drag them to the **Review Group** list.
4. (Optional) Reorder as required.

Deleting a review from a group

1. Open **Module Configuration** > *module* > **Reviews** > **Grouped Reviews**.
2. Select the group.
3. Select **Delete** next to the review item **Review Group** list.
4. (Optional) Reorder as required.

Tip: The default Community Development **Review** pane consists of the following columns: **Review Type**, **Reviewer**, **Sent Date**, **Due Date**, **Returned Date**, **Status**, and **Remarks**. This feature enables you to track the number of submittals for a record.

Reviewers List

Defining the Reviewer drop-down list within each Community Development module

1. Open **Module Configuration** > *module* > **Reviews** > **Reviewers**.
2. Select one or more users from the **Master Users List** and drag them to the **Reviewers** list.
3. (Optional) Reorder as required.

Removing a user from the Reviewers list

1. Go to **Module Configuration** > *module* > **Reviews** > **Reviewers**.
2. Select **Delete** next to the reviewers name in the **Reviewers** list.
3. (Optional) Reorder as required.

Tip: To quickly add a new user account, select the **Master User List Add** button. For more information about user accounts and privileges, see User Administration.

Tip: Reviewers should have a Community Development user account. Consider adding outside reviewers (for example, other government agencies) as Community Development users with limited privileges. Though it is not recommended, it is also possible to add a reviewer that is not a Community Development user by selecting the **Reviewers List Add** button. However, these reviewers are not granted access to Community Development and cannot enter results. Furthermore, reports and historical data might be incomplete since the reviewers' full names are not referenced in the User Accounts section.

Status codes for reviews

Defining the Review Status drop-down list

1. Go to **Module Configuration** > *module* > **Reviews** > **Status List**.
2. Select Add.
3. Enter the review status (maximum 30 characters)
4. (Optional) Select **Set Returned Date**. This feature automatically sets the returned date to the current date when the status is selected (no user prompt).
5. (Optional) Select **Prompt**. This feature prompts the user to confirm the setting of the returned date when the status is selected.
6. (Optional) Reorder as required.

Editing a review status

1. Go to **Module Configuration** > *module* > **Reviews** > **Status List**.
2. Select the field next to the status that you want to change.

Deleting a review status

1. Go to **Module Configuration** > *module* > **Reviews** > **Status List**.
2. Select **Delete** next to the review.

Standard notes for reviewers

Standard notes are predefined list of frequently used comments for reviews that can speed up data entry. They are in the Notes screen of reviews.

Adding a standard note for reviewers

1. Go to **Module Configuration** > *module* > **Reviews** > **Standard Notes**.
2. Select a reviewer's name or **All Reviewer**s.
3. Select **Add**.
4. Enter the comment/note in the **Standard Note** field.
5. Select whether this standard note is available for all review types or one review type.
6. (Optional) Reorder as required.

Deleting a standard note

1. Go to **Module Configuration** > *module* > **Reviews** > **Standard Notes**.
2. Select a reviewer's name or **All Reviewers**.
3. Select **Delete** next to the standard note.

Copying a standard note to one or more reviewers

1. Go to **Module Configuration** > *module* > **Reviews** > **Standard Notes**.
2. Select a reviewer's name.
3. Select the note to copy.
4. Select **Copy Notes to Another User**.
5. Select one or more users.
6. Select **Save**.

Review Preferences

The following are module-specific preferences associated with reviews:

- **Copy Review Dates on Permit Duplication** (Permitting): Controls whether the review **Sent**, **Due**, **Returned**, and **Sent By** field values are copied to the new record when you duplicate a permit and choose to copy reviews to the new record. Select this check box to copy the fields to the new record when a permit is duplicated. Clear this check box to leave the fields blank in the new permit.

- **Enable email messagebox when sending automatic emails for reviews** (Permitting, Projects and Planning): Select this option if you want to be able to make ad hoc changes to the emails sent automatically by Community Development to reviewers for permits and projects.
- **Lock Reviews to all except designated staff or ADMIN** (Permitting, Projects and Planning, or Licensing): Limits the ability to edit a review to only the selected reviewer or a Community Development system administrator.

Review Status Preferences

- **Set Permit Status to 'Approved' when the status of all reviews are set to _ and Send Email to** (Permitting, Projects and Planning): This feature provides the ability to automatically set the status of the permit to APPROVED when all of the statuses of each unique review on the record are set to one or more of the indicated statuses. Entering an email address in the **And Send Email to** box will generate an email notifying the user who all reviews have been completed.
- **Set Permit Status to**: Set the Automatic Default status to apply to permits once all review statuses are set to the user-defined list of statuses. A warning message appears when no default preference is set.
- **Review Status Codes That Satisfy Prerequisites**: When used, this feature provides the ability to automatically set the status of the permit to APPROVED when the required SEQUENCE of statuses on the record are met.

Auto Email Preferences

- **Send an Automatic Email when the Review is Reassigned** (Permitting, Projects and Planning): A Community Development-generated email is automatically sent to the assigned reviewer when a review is reassigned to a different reviewer.
- **Send an Automatic Email to the Assigned Reviewer when a Review is Added** (Permitting, Projects and Planning): A Community Development-generated email is automatically sent to the assigned reviewer when a review is first added to the record. This applies to auto reviews and reviews added manually.

  This option does *not* control whether an email is automatically sent when the reviewer assignment changes.
- **Custom Email Templates**: Select to use a custom email template for automated email. Once selected, a custom text file can be added and placed on the server in the **Documents** > **Email** > **Review** > *module* folder. The custom template then appears as a selectable option in the drop-down menu.

  Send an approval email to multiple addresses by separating each address with a semicolon (;).

Print Queue

Print Queue defines the document(s) that are available from the Print feature in the **Reviews** pane.

Enable the print queue function in **System Settings** > **Reviews**.

Place the documents/reports that users will print in the **//<app server>/Documents/*module name*/ REVIEWS** folder.

Auto email by module and review type

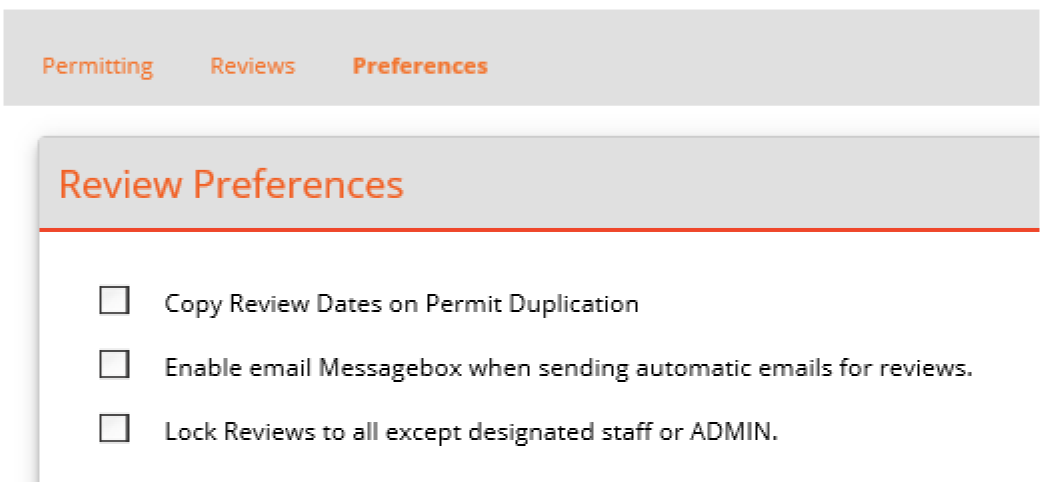
This feature automatically generates email from optional custom templates both by module and review type. When you enable this feature, each review type generates an email to the assigned reviewer when a review is added.

System Settings > Email

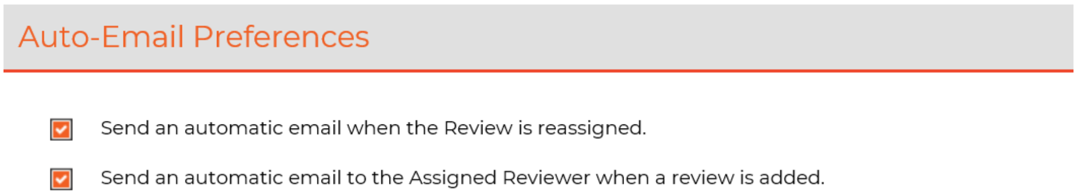
1. From the **E-mail Protocol** drop-down menu, select **SMTP**.
2. Enter the server name.
3. Enter the port (typically 25).

Module Configuration > Permitting or Projects and Planning > Reviews > Preferences

1. Expand the Configurable Components Record List, expand **Reviews**, and then select **Preferences**.



2. Under Review Preferences, select **Enable email messagebox when sending auto review emails**.
3. Under Auto-Email Preferences, select **Send an automatic email to the Assigned Reviewer when a review is added**. This sends a default email to the Reviewer.



4. When **Custom Email Templates** is selected, a user-customized text file is utilized as the email template and overrides the system default. Loaded templates appear as selectable options under the drop-down menu.
5. Select **Add**, **Review Type**, and **Email Template**. A maximum of one email template can be associated with each review type in each module.

Note: If a review email is needed for a type and template that has not been specified in the table, the template that has been selected in the drop-down menu is used.

Trades

Use the trades feature to manage inspection requests, inspector lists, and inspection result codes based on an assigned trade.

Limiting an online inspection request by trade

1. Create a list of trades in WUM **System Settings** > **Inspections** > **Trade List**.
2. Ensure that each Entity Management record type corresponds to a trade defined in step 1.
3. Associate a trade to an inspection type. For more information about how to associate an inspection with a trade, see Adding inspection types.

Limiting the list of inspectors and available result codes by trade

1. Create a list of trades in WUM **System Settings** > **Inspections** > **Trade List**.
2. Associate an inspector with a trade. For more information about how to associate an inspector with a trade, see Defining trade-specific inspectors.
3. Associate a result code set with a trade. For more information about how to associate an inspector with a result code set, see Defining trade-specific results.

Inspections

The Inspection configuration stores information used to schedule inspections in Land Management, Permitting, Projects and Planning, Code Compliance, and Licensing.

Inspection Preferences

Inspection preferences are in the **Module Configuration** > *module* > **Inspections** section for Land Management, Permitting, Projects and Planning, Code Compliance, and Licensing. Preferences vary by module.

Land Management

The **Inspections** section for Land Management includes the **Inspection Options** page with multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see Adding inspection types. The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific Land Management record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are shown to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 PM).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Permitting

The **Inspections** section for Permitting includes the **Preferences** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Show eTRAKiT inspection request types in Permits Type Definitions**: Adds eTRAKiT inspections as a configurable component in permit type definitions. For more information, see Configurable components.
- **Inspection Time Increments**: Use this option to define how time increments are shown to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 PM).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes multiple sections.

The **Inspector Assignment** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see Adding inspection types. The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific Land Management record.
- **Insp Type Overrides Geo**: If you select this option, when a default inspector is assigned to both the inspection type and a Land Management record, the inspector assigned to the inspection type takes precedence over the inspector assigned to the Land Management record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Use Default Inspector2 when Permit Prefix is**: The inspector assigned as the Default

Inspector2 for a specific inspection type is assigned as the default inspector for records that match the selected prefix.

The **Inspection Triggers** section includes the following option:

- **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is**: The finaled date is automatically set to the current date when the selected inspection result code is entered for all inspection types that begin with a double asterisk (for example, **Building Final).

The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see Re-Inspection Fee Schedule.

Restrictions page

The **Restrictions** page includes the following options:

- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Enable Per-Record Inspection Sequencing**: Select this option to define a per-permit inspection sequence. Inspections must be completed in order. A user cannot schedule an inspection until all prerequisite inspections are cleared.

  To enable inspection sequencing, complete the following steps:

  1. Select **Enable per-record inspection sequencing**. Enabling this feature adds an additional column labeled with a pound sign (#) to the Community Development **Inspections** pane and the Workspace **Inspection Center**.
  2. Number each inspection. An inspection numbered zero (0) is exempt from sequencing.
  3. In the **Inspection Result Codes that Satisfy Prerequisites/Sequencing** list, select one or more inspection results that satisfy the sequencing requirement.

     This feature overrides the inspection's REQUIRED PREVIOUS INSPECTION setting.
- **Allow Inspection Scheduling based on permit status**: Select this option to define the status the permit must have before the inspection can be scheduled. Clear this option if you want to allow inspections to be scheduled regardless of the permit status.

  Note: This does not prevent an inspection from being added to the record but does prevent the scheduled date from being set.

Projects and Planning

The **Inspections** section for Projects and Planning includes the **Preference** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see Adding inspection types. The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific Land Management record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are shown to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 PM).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see Re-Inspection Fee Schedule.

Code Compliance

The **Inspections** section for Code Compliance includes the **Preferences** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Follow-Up Date to Most Recent Inspection Scheduled**: Automatically sets the follow-up date to the most recent inspection scheduled date.
- **Set Last Action Date to Most Recent Inspection Scheduled**: Automatically sets the last action date to the most recent inspection scheduled date.
- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see Adding inspection types. The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific Land Management record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
  - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
  - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are shown to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 PM).
- **Disable Inspections**: Disable and removes the inspections feature from the user interface. This option is visible or invisible based on your configuration. Contact the Community Development support team for more information.

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see Re-Inspection Fee Schedule.

Licenses

The **Inspections** section for License includes the **Preference** group with multiple pages.

Preferences page

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see Adding inspection types. The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific Land Management record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
  - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
  - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are shown to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 PM).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see Re-Inspection Fee Schedule.

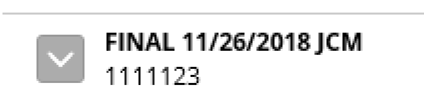
Re-Inspection Fee Schedule

Use options in the **Re-Inspection Fee Schedule** section to set up fees that are added automatically if an inspection fails with a specific result.

The Re-Inspection Fee Schedule options are available for permits, projects, code compliance cases, and licenses.

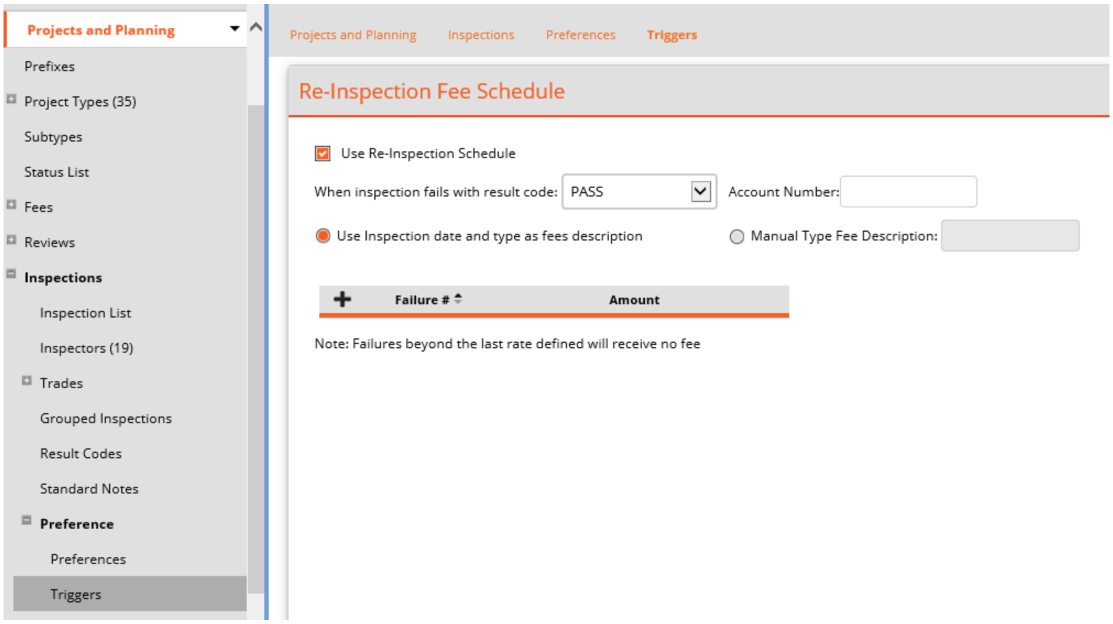
- **Use Re-Inspection Schedule**: Select this check box if you want to use a reinspection fee schedule to add fees automatically when an inspection fails with a specific result. The other options on the **Triggers** page are available only if you select this check box.
- **When inspection fails with result code**: Select the result that triggers the reinspection fee to be added to the record.
- **Account Number**: Type an account number to which reinspection fees are posted.
- **Fee description options**: Select one of the following options for the fee description that appears in the Community Development **Financial Information** pane for automatic reinspection fees.
    - **Use Inspection date and type as fees description**: Select this option to use the failed inspection date and type for the fee description. In the Community Development **Financial Information** pane, the fee name appears as the inspection name followed by the date the fee was applied and the user ID of the user who changed the inspection status.

      For example, if a Final inspection failed on November 26, 2018, and the inspector's user ID was JCM, the fee description looks like this:

    - **Manual Type Fee Description**: Select this option to use a fee description that you define as the fee description for all automatic reinspection fees. Type the fee description in the field.
- Fee schedule: Use the fee schedule table to define the fee amount for each reinspection. For example, you could set up a $50 fee for the first failed inspection, a $200 fee for the second failed inspection, and a $500 fee for the third failed inspection. To add a fee, select + and then type the fee amount. To remove a fee, select × in the fee row.

If a project or license requires more reinspections than you specify in the table, reinspection fees are not added for the later inspections. For example, if you set up three fees and a project or license fails four inspections, Community Development adds fees for the first three failed inspections but not the fourth.



To set up a reinspection fee schedule, complete the following steps:

1. Select the **Use Re-Inspection Schedule** check box.
2. Select a result that triggers the reinspection fee to be added to the record.
3. In the **Account Number** field, type an account number to which reinspection fees are posted.
4. Select one of the following options:
   - **Use Inspection date and type as fees description**: Select this option to use the failed inspection date and type for the fee description.
   - **Manual Type Fee Description**: Select this option to use a fee description that you define as the fee description for all automatic reinspection fees. Type the fee description in the field.
5. In the fee schedule table, select **+**.
6. In the **Failure #** column, type the failed inspection number. For example, if you are setting up the fee for a first failed inspection, type **1**.
7. Enter the fee amount for the failed inspection.
8. Repeat steps 5–7, if needed.
9. Select **Save**.

Inspection procedures

Adding inspection types

1. Open **Module Configuration** > *module* > **Inspections** > **Inspections List**.
2. Select **Add**.
3. Enter an inspection name.
4. (Optional) Enter an inspection description.
5. (Optional) Enter the IVR code in **Inspection No**.
6. (Optional) Select up to three **Required Previous Inspections** from the drop-down lists. Users cannot schedule the inspection until the required inspections are passed. To define the result code(s) that will satisfy the prerequisite, select one or more result codes from the **Inspection Result Codes that Satisfy Prerequisites/ Sequencing** (**Permitting** > **Inspections** > **Preferences** > **Restrictions**). See Enable Per-Record Inspection Sequencing.

   This feature is disabled if the Per Record Sequencing feature is enabled.
7. (Optional) Set the **Trade** requirement for the inspection.

   This feature is used to limit an AEC contractor's ability to initiate an inspection request to only those assigned to his or her trade.

(Optional) Set up an Automatic Re-inspection when an Inspection Receives Certain Result Codes

1. Select the result to trigger a reinspection (for example, **Failed**).
2. Select the inspection to insert.
3. Select the interval type used to schedule the reinspection (days, years, 12/31 for the last day of the following year).
4. Enter the length of the scheduling interval (number of days or years before the reinspection).

(Optional) Set the Inspection Defaults

1. Depending on your system preferences, default inspectors might be assigned by geographic area or record type. If this inspection is assigned by type, select the **Default Inspector**.
2. If this inspection is assigned to a secondary default inspector for permits with a certain prefix only, select the **Inspector for Permits with Prefix** (the prefix must be set up in your system preferences). For more information about how to create a prefix, see Adding a prefix.
3. Enter the **Default Duration** for the inspection. This field defines the inspection duration when the inspection is scheduled using the **Calendar Scheduling** feature. For example, an inspection with a duration of 1 hour when scheduled on the calendar starting at 0800 would span from 0800 to 0900.

Create Custom Screens for an Inspection Type

1. Open **Module Configuration** > *module* > **Inspections** > **Inspections List**.
2. Either select **UDF** on the Inspections List or double-click the inspection type and then select **Custom Screens**.
3. Set up additional data fields and Custom Screens for the selected inspection type as explained in Custom Screens.

Inspector List

Defining the inspector list within each Community Development module

1. Open **Module Configuration** > *module* > **Inspections** > **Inspectors**.
2. Select one or more users from the **Master Users List** and drag them to the **Inspectors** list.
3. (Optional) Enter the IVR code for each inspector.
4. (Optional) Define the icon that represents the inspector on Scheduled Inspections map.
5. (Optional) Reorder as required.

Removing a user from the inspectors list

1. Open **Module Configuration** > *module* > **Inspections** > **Inspectors**.
2. Select **Delete** next to the inspector's name in the **Inspectors** list.
3. (Optional) Reorder as required.

Tip: To quickly add a new user account, select the **Master User List Add** button. For more information about user accounts and privileges, see User Administration.

Tip: Inspectors should have a Community Development user account. Consider adding outside inspectors (for example, contract inspectors) as Community Development users with limited privileges. Though it is not recommended, it is also possible to add an inspector that is not a Community Development user by selecting the **Inspectors List Add** button. However, these inspectors are not granted access to Community Development and cannot enter results. Furthermore, reports and historical data might be incomplete since the inspector's full names are not referenced in the **User Accounts** section.

Defining trade-specific results

This feature provides the ability to create a set of inspection result codes that are unique to a trade.

1. Open **Module Configuration** > *module* > **Inspections** > **Trades** > **Results by Trade**.
2. Select the trade from the drop-down list or select **Add** to create a new Trade item.

3. Select one or more result codes from the **Master Result Code List** and drag them to the **Results list for Trade Type**.
4. (Optional) Reorder as required.

Defining trade-specific inspectors

This feature provides the ability to associate an inspector with a trade.

1. Open **Module Configuration** > *module* > **Inspections** > **Trades** > **Inspectors by Trade**.
2. Select the trade from the drop-down list or select **Add** to create a new Trade item.
3. Select one or more Inspector names from the **Master Inspector List** and drag them to the **Inspector List for Trade**.
4. (Optional) Reorder as required.

Grouped inspections

To facilitate inspection scheduling and reporting, you can organize inspection types into groups (for example, **Electrical**, **Mechanical**, **Plumbing**) within each Community Development module.

Adding a group

1. Open **Module Configuration** > *module* > **Inspections** > **Grouped Inspections**.
2. Select **Add** next to the **Group** drop-down list.
3. Enter a group name (maximum of 12 characters).
4. Select **Save**.

Editing an inspection group title

1. Open **Module Configuration** > *module* > **Inspections** > **Grouped Inspections**.
2. Select the group.
3. Select **Edit**.
4. Enter the new review group name.
5. Select **Save**.

Deleting an inspection group

1. Open **Module Configuration** > *module* > **Inspections** > **Grouped Inspections**.
2. Select the group.
3. Select **Delete**.
4. Select **OK**.

Adding an inspection to a group

1. Open **Module Configuration** > *module* > **Inspections** > **Grouped Inspections**.
2. Select the group.
3. Select one or more inspections from the **Master Inspections List** and drag them to the **Inspection Group** list.
4. (Optional) Reorder as required.

Deleting an inspection from a group

1. Open **Module Configuration** > *module* > **Inspections** > **Grouped Inspections**.
2. Select the group.
3. Select **Delete** next to the inspection item in **Inspections Group** list.
4. (Optional) Reorder as required.

Defining result codes for inspections

1. Open **Module Configuration** > *module* > **Inspections** > **Result Codes**.
2. Select **Add**.
3. Enter the result code (maximum of 20 characters).
4. (Optional) Create an automatic reinspection fee by adding the reinspection fee code into the **Fee Code** column and the reinspection fee amount into the **Amount** column. For more information about creating fees, see Fee definitions.
5. (Optional) Reorder as required.

Standard notes for inspectors

Standard notes are predefined lists of frequently used comments for inspectors that can speed up data entry. They are in the **Notes** screen of inspections.

Adding a standard note for inspectors

1. Open **Module Configuration** > *module* > **Inspections** > **Standard Notes**.
2. Select an inspector's name or **All Inspectors**.
3. Select **Add**.
4. Enter the comment/note in the **Standard Note** field.
5. Select whether this standard note is available for all inspection types or one specific inspection type.
6. (Optional) Reorder as required.

Deleting a standard note

1. Open **Module Configuration** > *module* > **Inspections** > **Standard Notes**.
2. Select an inspector's name or **All Inspectors**.
3. Select **Delete** next to the standard note.

Copying a standard note to one or more inspectors

1. Open **Module Configuration** > *module* > **Inspections** > **Standard Notes**.
2. Select an inspector's name.
3. Select the note to copy.
4. Select **Copy Notes to Another User**.
5. Select one or more inspectors.
6. Select **Save**.

Adding standard remarks for batch scheduling

Standard remarks are predefined list of frequently used comments or statements from which a user can select one or more when using the batch scheduling feature.

1. Open **Module Configuration** > *module* > **Inspections** > **Standard Remarks**.
2. Enter a list of standard remark(s). Each remark must begin on a new line and can be a maximum of 40 characters in length.

Event Scheduler

The Event Scheduler stores defined events and their associated activities and time frames. Use this feature when an event requires standard actions at a scheduled time frame in relation to the event.

Example: Assume that for a public hearing, you always need to hold a staff meeting 30 days before the hearing and provide public notice 15 days before the hearing. You could set up an event called Public Hearing that includes the public hearing, staff meeting, and public notice. When you add the event to an activity record in Community Development, you set the date for the public hearing and Community Development adds the staff meeting, public notice, and public hearing actions on the correct dates.

This feature is available in Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management (AEC).

The **Event Scheduler** page includes the following areas:

- **For All Events**: Select one of the following options:
  - Select **Use Work Dates Calendar** if you want to include only work days when counting days before an event (this excludes weekends and holidays).
  - Select **Use All Days - including weekends and holidays** if you want to include weekends and holidays when counting days before an event.

    The option you select applies to events you set up after you make the selection. It does not change events that are already set up.
- **Event Scheduler**: This area lists all the events previously set up by your agency and enables you to add, modify, and delete events. In the listing, you can:
  - Add an event. Select + in the header and follow the instructions in Adding an event.
  - Delete an event. Select × in the row of the event you want to delete and then select **OK**. See Deleting an event.
  - Reorder events. Drag events in the listing to change the order. WUM updates the number for each event in the listing as you move events. The order you define in WUM is the order in which the events are listed in the **Event Type** drop-down list in Community Development.
  - Renumber the events. If you manually renumbered the list and want to reassign sequential numbers, select ⟳.
  - Select whether the event uses the Cascading Dates feature. Select the **Cascading Dates** check box if you want dates for future events for the event type to be adjusted when you use the Edit Event feature in Community Development to change the date of one of the events. Clear the check box if you do not want dates to be adjusted automatically.
  - Open the **Add/Edit EventScheduler** dialog box to change an event or related activities. See Editing an event.

Adding an event

To add an event and related actions, complete the following steps:

1. Go to **Module Configuration** > *module* > **Event Scheduler**.
2. In the **Event Scheduler** area, select +.
3. In the **Event Title** field, type a title for this event. The maximum number of characters is 50.
4. Select the **Cascading Dates** check box if you want dates for future events for this event type to be adjusted when you use the **Edit Event** function in Community Development to change the date of one of the events. Clear the check box if you do not want dates to be adjusted automatically.

The Cascading Dates feature is available only for events you add after you install release 18.1 HF07 or later.

5. In the action listing, select **+**.
6. In the **Description** column, type a description for the action. The maximum number of characters is 30.
7. Select the **# of Days** column.
8. Type the time frame for the action. Type a negative number for an activity that occurs *before* the event date (for example, **-5** for five days prior to the event). Type a positive number for an activity that occurs *after* the event date (for example, type **3** for three days after the event). Type **0** for the event and any actions that occur on the same day as the event.
9. Repeat steps 5–7 until you have added all the actions for this event.

   If you add an action that you do not need, select **×** in the row to delete it.
10. Select **Save**.
11. On the **Event Scheduler** page, select **Save**.

Editing an event

To edit an event or related actions, complete the following steps:

1. Go to **Module Configuration** > *module* > **Event Scheduler**.
2. Double-click the row for the event you want to change.
3. Update the event title, **Enable Cascading Dates** check box, and actions listing as needed.

   The Cascading Dates feature is available only for events you add after you installed release 18.1 HF07 or later.
4. Select **Save**.
5. On the **Event Scheduler** page, select **Save**.

Existing events and related actions in Community Development do not change. Events you add after you save changes reflect the updates to the event or actions.

Deleting an event

When you delete an event in WUM, existing events and related actions in Community Development are not deleted. However, you can no longer add events of this type in Community Development.

If you use the Cascading Dates feature, you cannot delete event types that have pending (not completed) actions in Community Development.

To delete an event, complete the following steps:

1. Go to **Module Configuration** > *module* > **Event Scheduler**.
2. In the row of the event you want to delete, select ✕.
3. Select **OK** to confirm the deletion.

Conditions

Conditions stores the definitions for the Conditions feature in Permitting, Projects and Planning, and Licensing.

Enabling the Conditions feature

1. Open **Module Configuration** > *module* > **Conditions** > **Conditions List**.
2. Select **Allow Multiple Conditions**.

Adding a condition

1. Open **Module Configuration** > *module* > **Conditions** > **Conditions List**.
2. Select **Add**.
3. Enter a condition name.
4. Enter condition notes.
5. Select a default contact. For more information about how to define this list, see Defining the default contacts list.
6. Create a custom screen. For more information, see Custom Screens.
7. Reorder as required.

Grouped conditions

Adding a group

1. Open **Module Configuration** > *module* > **Conditions** > **Grouped Conditions**.
2. Select **Add** next to the **Group** drop-down list.
3. Enter a group name (maximum of 12 characters).
4. Select **Save**.

Editing a condition group title

1. Open **Module Configuration** > *module* > **Conditions** > **Grouped Conditions**.
2. Select the group.
3. Select **Edit**.

4. Enter the new review group name.
5. Select **Save**.

Deleting a condition group

1. Open **Module Configuration** > *module* > **Conditions** > **Grouped Conditions**.
2. Select the group.
3. Select **Delete**.
4. Select **OK**.

Adding a condition to a group

1. Open **Module Configuration** > *module* > **Conditions** > **Grouped Conditions**.
2. Select the group.
3. Drag one or more conditions from the **Master Conditions List** and to the **Conditions Group** list.
4. (Optional) Reorder as required.

Deleting a condition from a group

1. Open **Module Configuration** > *module* > **Condition** > **Grouped Conditions**.
2. Select the group.
3. Select **Delete** next to the condition item in **Conditions Group** list.
4. (Optional) Reorder as required.

Departments

To add a department, complete the following steps:

1. Go to **Module Configuration** > *module* > **Conditions** > **Departments**.
2. Select **Add** and enter a title.
3. (Optional) Reorder as required.

Status List

Adding a condition status

1. Open **Module Configuration** > *module* > **Conditions** > **Status List**.
2. Select **Add** and enter a status title.
3. (Optional) Reorder as required.

Contacts

Defining the default contacts list

1. Open **Module Configuration** > *module* > **Conditions** > **Contacts**.
2. Select one or more names. Names are available in the Contact drop-down list when creating or editing a condition.

Preferences

- **If Default Contact not defined, insert current user**: The currently logged in user's name will be assigned as the default contact when no default contact is assigned on the conditions list definition.

Triggers (Projects and Planning only)

- **Prevent Create Sub permits**: Disables the creation of subpermits in a project for selected statuses.
- **Enable Project Status Lock**: Enables a project status to be locked based on whether selected conditions are met.
- **Enable Project Fee Status**: Disables editing of project fee status until selected conditions are satisfied.
- **Enable Sub-Permit Status**: Disables editing of a subproject or subpermit status until conditions are met.
- **Enable Sub-Permit Limitation**: Displays a user warning message when subprojects or subpermits are created on a project with conditions.
- **Enable Restriction Message Warnings**: This option is not used.

Checklists

Checklists provide an option for determining multiple conditions with Inspections and Reviews. Checklists must be configured in WUM for use with inspection and review types.

Checklist Rules

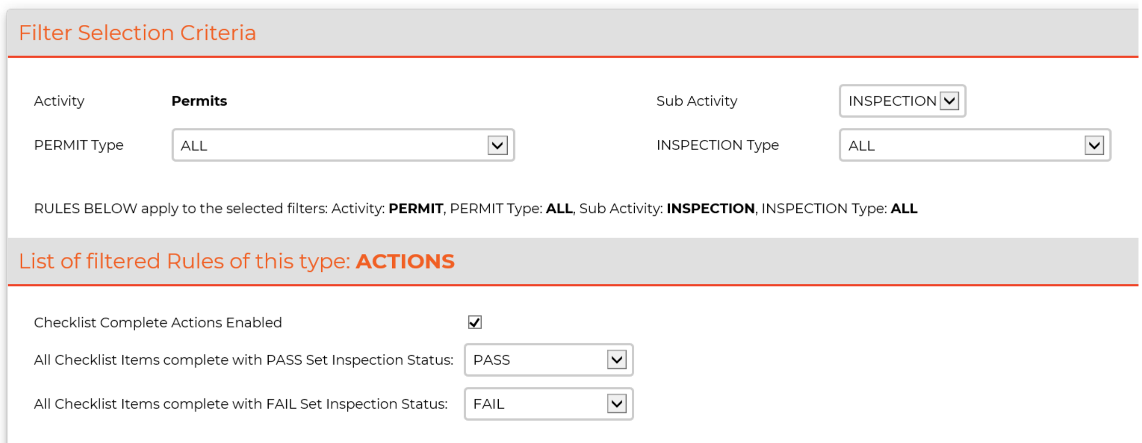
Module Configuration > *module* > Checklists > Checklist Rules

Global checklist rules are configured based on the record type and either the inspection type or review type. The rule options for each setting combination are shown below.

Checklist Rules: ACTIONS

- **Checklist Complete Actions Enabled**: Select to turn on the functionality for actions to occur after the checklist is updated and finished.

- **All Checklist Item Complete with PASS Set Inspection Status**: Select the status from the drop-down menu to apply to the parent record when a checklist is complete, which includes all linked reviews and inspections. This only applies when the **Checklist Complete Actions Enabled** check box is selected.
- **All Checklist Items Complete with FAIL Set Inspection Status**: Select the status from the drop-down to apply to the parent record when a checklist has at least one failure, which includes all linked reviews and inspections. This only applies when the **Checklist Complete Actions Enabled** check box is selected.



Checklist Rules: RESTRICTIONS

- **Enable Checklist Restrictions**: Select the check box to turn on the ability to restrict certain actions.
- **List of Restricted Statuses**: Select from the available list of statuses to limit the user from editing an inspection or review to the listed statuses until the checklist linked to that inspection or review is complete.

Checklist Rules: GENERAL

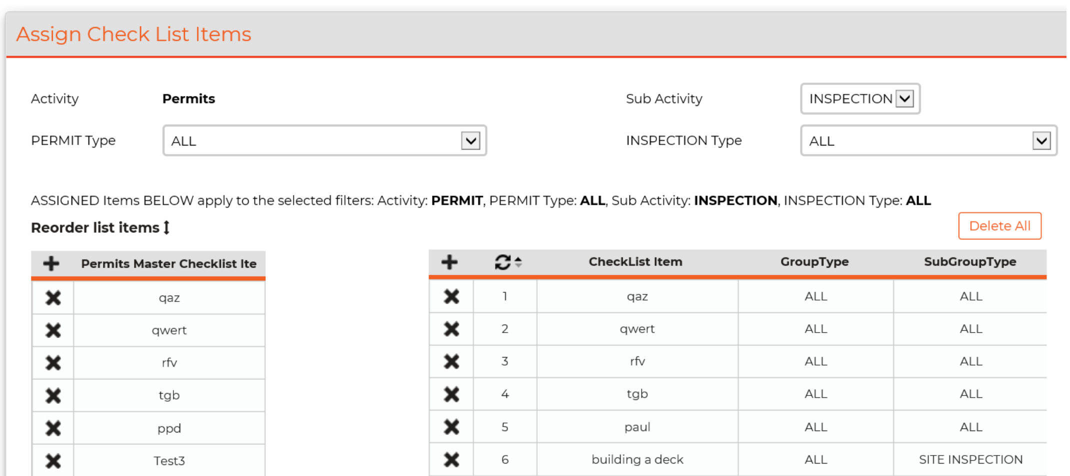
- **Copy Checklist Details for Autos of Type INSPECTION**: Select this check box to ensure checklists carry forward to subsequent inspections or reviews if an inspection or review has been failed.

Build Checklists

Module Configuration > *module* > Checklists > Build Checklists

Checklist options are built based on Record Type and either Inspection Type or Review Type. Options can be configured for each combination of settings. For this example, a permit is shown below.

1. Choose the permit type from the drop-down menu.
2. Select the subactivity from the drop-down menu. The choices are **Inspection** or **Review**.
3. Choose the inspection type or review type from the drop-down menu.
4. Drag all applicable global checklist items from the master list on the left to the specifically configured list on the right. For checklist items assigned to the selected types and subactivity, select **+** to create a new one-time item in the table on the right.



5. Select **Save** when done.

eTRAKiT Roles

Use the **eTRAKiT Roles** page to select contact types for which you want to configure custom views in eTRAKiT. Configuration options in eTRAKiT Administrator determine which fields logged-in users can see based on their contact type for an activity.

To select contacts to configure, drag a contact from the **Master Contact List** on the left of the page to the listing on the right. Save your changes, and then go to eTRAKiT Administrator to complete the setup. For details about the setup in eTRAKiT Administrator, refer to the *eTRAKiT Administrator* guide, “Display” section under module preferences > General.

The **eTRAKiT Roles** page is available in WUM **Module Configuration** for Land Management, Permitting, Projects and Planning, Code Compliance, Licensing, and AEC.

Module System Preferences

This section defines module-specific system preferences.

Permitting

Enable or disable a system preference

1. Go to **Module Configuration** > **Permitting** > **Preferences**.
2. Select **Preferences** and then **Triggers**, **Restrictions**, or **Default Date Settings**.

Preferences

The following permit system preferences apply to the entire module and are not type-specific. For more information about permit type-specific preferences, see System preferences by record type.

Delete Permit

- **Delete Permit Record**: Deletes a specified permit record. This option is available *only* for Admin users. Users without Admin permission cannot access the **Delete Permit** function.

Main Permit—Options

- **Show dialog box to allow copy of Description and Notes to new Sub-Permit**: Allows the user to determine when the description and notes are copied to a subpermit. When disabled, the notes and description are automatically copied to the subpermit.
- **Disable Attachments DELETE**: Disables all users’ ability to delete attachments (this feature overrides the users’ privileges). Does not apply to System Administrators.
- **Lock Permit FINALED DATE on All Permit Types**: Locks the finaled date field for all users. Does not apply System Administrators.
- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.

Permit Sub-Screen Indicators

Select one of the following options to define how panes with multiple items display the total number of items in the pane title:

- **No indicator**: Only the title appears (for example, **Contacts**)
- **Asterisk indicator**: An asterisk (*) appears after the pane title (for example, **Contacts***)
- **Record Count Indicators**: The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)

Attachment Auto-Email Preferences

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Default Triggers

These preferences are available at the module level and the permit type level. To set or change preferences at the module level, go to **Module Configuration** > **Permitting** > **Preferences** > **Triggers**. To set or change preferences at the permit type level, go to **Module Configuration** > **Permitting** > **Permit Types** > *type* > **Preferences**.

When you add a permit, you can set these preferences specifically for the permit type. If you set these preferences for the permit type, the type-level settings are used rather than the module-level settings.

If you do *not* set these preferences for the permit type, the module-level settings are used.

If you have not set the preferences at the type level, the page name appears dimmed. When you select the page, a prompt appears asking if you want to set up custom preferences. Select **OK** to set the preferences at the permit level or select **Cancel** to retain module-level settings for the permit type.

Status Triggers

The following triggers apply to the status field:

- **Default Status for New Permit**: Defines the initial status when the permit record is created.

> **Note:** If you use eTRAKiT, the value in the eTRAKiT **New Status** field overrides this WUM setting for permit applications submitted in eTRAKiT. The **New Status** field is in eTRAKiT Administrator **Permitting** > **Application** > **Custom**.

- **Reset Permit Status on Review Status Change**: Changes the permit status to the selected status and clears the approved date when the status of any existing review is changed.
- **Change Status on ISSUED date TO**: Automatically sets the permit status to the one selected when the issued date is entered.
- **Set Status to 'FINALED' when finaled date is entered**: Automatically set the permit status to **FINALED** when the user enters the finaled date manually or automatically.

  The finaled date can be set automatically when the final inspection is passed. For more information about this feature, see Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is.

  The expiration date can be automatically cleared when the finaled date is entered. For more information, see Clear Expiration date when Finaled date is entered.
- **Change Permit Status when Finaled date to**: Provides the ability to select a specific status when the finaled date is entered.

Lock Triggers

- **Lock Permit Record after Issued date**: Locks the permit information, contacts, valuations, financial information, chronology, and custom screen panes after the issued date is set. Additionally, you can exclude the **Chronology** pane and **Financial Information** pane from the lock by selecting **Exclude Chronology Pane**, **Exclude Financial Pane**, or **Exclude Contacts**.
- **Lock Permit after Finaled date or Expired date (Applies to Inspection & Reviews)**: Locks the permit record (including the **Reviews** and **Inspections** panes) when the finaled date is entered or on the expiration date of the permit.
- **Lock Permit when Status is**: Defines the status that locks the entire permit record except for bonds.
- **Lock Permit REVIEWS after ISSUED date**: Locks all panes in the record except for **Bonds**.
- **Lock Permit Status except for ADMIN**: Only System Administrators are able to change the permit status manually.

Date Triggers

- **On create, set Approved and Issued to current date**: Automatically sets the approved and issued date to the current date when the record is initially created.
- **Clear Expiration date when Finaled date is entered**: Clears the expiration date when the finaled date is entered.

  The finaled date can be set automatically when the final inspection is passed. For more information about this feature, see Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is.

- **Set ISSUE date on Print Request**: Select this check box if you want the application to automatically set the issued date to the current date when you print the permit. Clear this check box if you do not want the application to automatically set the issued date to the current date when you print the permit.

  Important: This option is available at the module level and at the permit type level. The setting at the module level is used only when there is no entry in the database for the permit type setting. The permit type setting is in **Module Configuration** > **Permitting** > **Permit Types** > *type* > **Preferences** > **Triggers** > **Date Triggers**.

- **On create, set Approved date to current date**: Automatically sets the approved date to the current date when the record is created.

Default Restrictions

These preferences are available at the module level and the permit type level. To set or change preferences at the module level, go to **Module Configuration** > **Permitting** > **Preferences** > **Triggers**. To set or change preferences at the permit type level, go to **Module Configuration** > **Permitting** > **Permit Types** > *type* > **Preferences**.

When you add a permit, you can set these preferences specifically for the permit type. If you set these preferences for the permit type, the type-level settings are used rather than the module-level settings.

If you do *not* set these preferences for the permit type, the module-level settings are used.

If you have not set the preferences at the type level, the page name appears dimmed. When you select the page, a prompt appears asking if you want to set up custom preferences. Select **OK** to set the preferences at the permit level or select **Cancel** to retain module-level settings for the permit type.

- **Prevent ISSUE before APPROVED**: Disables the ability to set the issued date until an approved date is entered.
- **Prevent ISSUE before all FEES are paid**: Disables the ability to set the issued date if there is a balance due on the permit.
- **Prevent ISSUE unless Status set to**: Disables the ability to set the issued date until the permit status matches the status selected in this preference.
- **Prevent Creating Sub-Permits when locked**: Disables the user’s ability to create a subpermit when the record is locked.

Default Date Settings

These preferences are available at the module level and the permit type level. To set or change preferences at the module level, go to **Module Configuration** > **Permitting** > **Preferences** > **Triggers**. To set or change preferences at the permit type level, go to **Module Configuration** >

Permitting > **Permit Types** > *type* > **Preferences**.

When you add a permit, you can set these preferences specifically for the permit type. If you set these preferences for the permit type, the type-level settings are used rather than the module-level settings.

If you do *not* set these preferences for the permit type, the module-level settings are used.

If you have not set the preferences at the type level, the page name appears dimmed. When you select the page, a prompt appears asking if you want to set up custom preferences. Select **OK** to set the preferences at the permit level or select **Cancel** to retain module-level settings for the permit type.

- **Default Expiration Days: Automatically set when Permit is Issued**: Automatically sets the *expiration* date on the permit when the *issued* date is entered. Expiration date is calculated from the current date and based on calendar days. This action requires user confirmation unless you select **Suppress User Prompt**.
- **Suppress User Prompt**: When you select **Default Expiration Days: Automatically set when Permit is Issued**, automatically sets the expiration date without user confirmation.
- **Default Expiration Days: Automatically Set After Inspection when Result Is**: Automatically sets the expiration date on the permit when either the selected status is set or any status is set on an inspection. Expiration date is calculated from current date and based on calendar days. This action requires user confirmation unless you select **Suppress User Prompt**.
- **Suppress User Prompt**: When you select **Default Expiration Days: Automatically Set After Inspection when Result Is**, automatically sets the expiration date without user confirmation.
- **Permit Date Label**: Custom label you want to use for the sixth (last) date on the permit main information pane.
- **Permit Date Setting (days) Automatically Set**: Values used for automatically calculating and setting the sixth date on the permit information screen. Select the check box to use this feature. Then, in the first text box, enter the number of days. In the drop-down list, select which existing date the sixth date is based upon.

Projects and Planning

The following system preferences are available for the Projects and Planning module.

Enable or disable a system preference

1. Open **Module Configuration** > **Projects and Planning** > **Preferences**.
2. Select **Preferences**, **Triggers**, or **Restrictions**.

The following is a list of explanations for the Projects and Planning system preferences.

Preferences

- **Show Tooltip while Adding Condition and Condition Groups**
- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.
- **Delete Project Record**: Deletes a specified project record.
- **Change Label for Planner drop-down**: Default label is **Planner**. When enabled, enables your agency to define the label associated with the name drop-down list on the project main information pane.
- **Project Sub-Screen Indicators**: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:
    - **No indicator**: Only the title appears (for example, **Contacts**)
    - **Asterisk indicator**: An asterisk (*) appears after the pane title (for example, **Contacts***)
    - **Record Count Indicators**: The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)
- **Default Date Settings**: Projects and Planning provides the ability to change the labels associated with the dates on the **Project Information** pane (except for **Applied**).

    Warning: The **Projects and Planning** pane in the Community Development Workspace uses the closed date to define which records are displayed. Changing the closed label might cause the **Projects and Planning** pane to indicate incorrectly which projects are currently open.

    Warning: Community Development standard Projects and Planning reports use the default label settings. Changing the labels might cause the Projects and Planning standard reports to display incorrect or misleading data.

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Triggers

- **Lock Project Record After CLOSED**: Locks the record after the closed date is entered.
- **Default Status for New Project**: Defines the initial status when the record is created.

  If you use eTRAKiT, the value in the eTRAKiT **New Status** field overrides this WUM setting for project applications submitted in eTRAKiT. The **New Status** field is in eTRAKiT Administrator **Projects and Planning** > **Application** > **Custom**.

Restrictions

- **Prevent Creating Sub-Projects When Locked**: Disables the user's ability to create a subproject when the record lock is set.
- **Prevent Creating Sub-Permits When Locked**: Disables the user's ability to create a subpermit when the record lock is set.
- **Prevent Linking Cases to CLOSED Projects**: Disables the user's ability to link an existing Code Compliance record to the project after the closed date is entered.
- **Only Allows the Assigned Planner or the Admin to Edit the Project**: Limits the ability to edit the project main information, **Chronology**, **Financial Information**, **Conditions**, and **Custom Screens** panes to either the assigned staff member or system administrator. Also, any contact record automatically inserted at the time the record is created is only editable by the assigned staff member or system administrator.
- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the users' privileges). Does not apply to system administrators.
- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for Microsoft Windows Word documents (.DOC) to read-only when attached to a record.
- **Enable Project Sync Feature**: Enables a master project to be created at the same time as linked subprojects with synchronized descriptions, details, and dates. Once selected, the status settings in the drop-down list become available for selection.

Code Compliance

The following system preferences are available for the Code Compliance module:

Enable or disable a system preference

1. Open **Module Configuration** > **Code Compliance** > **Preferences**.
2. Select **Preferences**, **Triggers**, or **Restrictions**.

The following is a list of explanations for the Code Compliance system preferences:

Preferences

- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.
- **Set Follow-Up Date to Most Recent Chronology Action**: Automatically sets the **Follow-Up** date to the most recent Chronology Activity's **Action Date**.
- **Set Last Action Date to Most Recent Chronology Action**: Automatically sets the Last Action date to the most recent Chronology Activity's Action Date.
- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Triggers

- **Change Label Optional Case Date**: Provides the ability to customize the label used to identify the sixth (last date) on the case information pane.
- **Delete Case**: Deletes the specified case record.
- **Default Officer for New Cases**: Provides the ability to set the default officer based on either the officer assigned to the Land Management record or an individual from the drop-down list. Select **Geo-Based** to assign the officer based on the Land Management record.
- **Default Status for New Cases**: Defines the initial status when the record is created.
- **Email Notify Officer when New Case is Created from Land Management**: Automatically generates an email to the officer, selected by the user, that a new case was created.
- **Enable Cross-Link Function**: The Community Development default behavior provides the ability to create linked cases and duplicate cases. A linked case creates a parent-child relationship between the records. Duplicating a case creates a copy of the original case record.

  Note: Enabling the Cross-Link function changes the default behavior and provides the ability to create a new case record that is linked to the current case record and copies information from the current record (site info, contacts, custom screens, and fees) to the new case record, as required. All records created using this feature are listed on the **Tree** tab under **Linked Cases**. There is no parent-child relationship for cross-linked cases.

- **Lock Case Record After CLOSED**: Locks the record after the CLOSED date is entered. To exclude the Chronology pane from this setting, select **Exclude Chronology Pane from the Code Compliance Case Closed Lock** or **Exclude Attachments**.
- **Lock Chronology Item After Saved**: Places a lock on the chronology record after the user leaves the chronology pane.
- **Lock Chronology Items After Action Date**: Locks the Chronology activity after the Action Date is passed.

Restrictions

- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the user's privileges). Does not apply to System Administrators.
- **Record Sub-Screen Indicators**: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:
  - **No indicator**: Only the title appears (for example, **Contacts**)
  - **Asterisk indicator**: An asterisk (*) appears after the pane title (for example, **Contacts***)
  - **Record Count Indicators**: The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)
- **Protected Contacts**: Provides the ability to hide the selected contact or contacts from users who do not have the CODE: CAN VIEW PROTECTED CONTACTS privilege.

Licensing

The following system preferences are available for the Licensing module:

Enable or disable a system preference

1. Open **Module Configuration** > **Licensing** > **Preferences**.
2. Select **Preferences**, **Triggers**, **Restrictions**, or **License Options**.

The following is a list of explanations for the Licensing system preferences.

Preferences

- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.

- **License Sub-Screen Indicators**: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:
  - **No indicator**: Only the title appears (for example, **Contacts**)
  - **Asterisk indicator**: An asterisk (*) appears after the pane title (for example, **Contacts***)
  - **Record Count Indicators**: The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)
- Encrypt MainTextField1–5: Select this option if you want to encrypt the field value for this field. Fields that are encrypted appear masked as dots in Community Development. Users with appropriate privileges can unmask the value.

  Important: These options *cannot* be toggled on and off. Once you select the option to encrypt a field and you save your changes, you cannot clear the option.

  Note:
  Ensure the fields you want to encrypt are not set up as drop-down lists. Drop-down lists cannot be encrypted.

  For more information about user privileges related to masked fields, see descriptions of the following privileges in the Available privileges section:

  - AEC DENY VIEW FEINSSN
  - Licensing DENY VIEW FEINSSN
- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Triggers

In the **When a Business License is paid** section:

- **Prompt for setting License Expiration to a specified date**: Prompts the user to accept the automatic setting of the license expiration date to the specified date when fees are paid.
- **Prompt for setting License Expiration date to end of year**: Prompts the user to accept the automatic setting of the license expiration date to 12/31 of the current year when fees are paid.

Additional options:

- **Set the STATUS for a new Business License to**: Defines the initial status for a new business license record.

- **Delete License2**: Enables you to delete a license record. Select this button, enter the record number, and then select **Delete**.
- **Display Custom Screens on business type**: Provides the ability to create business type-specific custom screens.
- **Show Confidentiality message on Owner Tab**: Displays a message to the user when the Owner Contact information is accessed. To define or edit the message, select the **message** link in the system preference title.
- **Delete License**: Deletes the specified license record.
- **Verify Unique Business Name**: Notifies the user if the business name exists. Users can choose to continue or change the business name.
- **Verify Unique Business Tax ID**: Notifies the user if the business tax ID exists. Users can choose to continue or change the tax ID.
- **When a Business License is paid, Set TAG for Printing**: Automatically sets the TAG field in the license_business table to the value of one (1) when fees are paid.

Tip: The TAG field can be viewed or manually set through the custom screens. For more information about adding a field to a custom screen, see Custom Screens.

Restrictions

- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for Microsoft Word documents (.DOC) to read-only when attached to a record.
- **Disable Attachments DELETE** (Licenses): Disables a user's ability to delete License record attachments (this feature overrides the user's privileges). Does not apply to System Administrators.
- **Allow Only ONE License Per Business With Prefix**: Default behavior allows the creation of multiple licenses per business record with a prefix. Enabling this feature only allows one license per business record with a prefix.
- **Allow Only ONE License Per Business Without Prefix**: Default behavior allows the creation of multiple licenses per business record without a prefix. Enabling this feature only allows one license per business record without a prefix.
- **Lock All Drop-downs to Prevent Text Entry**: Requires the user to select from the drop-down lists only. Users cannot manually enter data.
- **Set Word (.DOC) to Read-Only (License)**: Automatically sets the attribute flag for Microsoft Word documents (.DOC) to read-only when attached to a record.
- **Disable Attachments DELETE (Business)**: Disables user's ability to delete business record attachments (this feature overrides the user's privileges). Does not apply to System Administrators.

- **Disable Print Queue (Shows Only the Current Record)**: By default, the Community Development print feature provides the user with the ability to queue up documents from different records within the same module and then print them all simultaneously. By selecting this system preference, the print queue is disabled and the user is only able to print documents from the current record.

CRM

The following system preferences are available for the CRM module:

Enable or disable a system preference

1. Open **Module Configuration** > **CRM** > **Preferences**.
2. Select **Preferences**.

The following is a list of explanations for the CRM system preferences.

Preferences

- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.
- **Due Date is Set _ days from current date**: Calculates the due date from the current date based on the number of days entered. CRM uses calendar days to calculate the due date.
- **Disable BCC Emails to Logged in User when issue is created from Community Development**
- **Issues are Locked**: The record is locked when the status designated as **This Status Marks the Issue as Completed** is selected.
- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

AEC (Entity Management)

The following system preferences are available for the Entity Management module:

Enable or disable a system preference

1. Open **Module Configuration** > **AEC** > **Preferences**.
2. Select **Preferences**, **Contractor Options**, or **Sub-Screens**.

The following is a list of explanations for the AEC system preferences.

Preferences

- **Allow users to edit type and subtype**: Choose whether to make the **Edit Type/Subtype** function available for this module in Community Development. If you select the check box, the **Edit Type/Subtype** function is available in Community Development. If you clear the check box, the function is not available in Community Development.
- **AEC Registration Number AutoGen name**: Defines how Entity Management registration numbers are created. Select an existing autogen number from the list to automatically number a new Entity Management record.
- **AEC Receipt Number AutoGen name**: Defines the autogen number used on the receipt.
- **AEC Receipt Document Name**: Defines the document that is used to generate a receipt in Entity Management. These documents are stored in *YourAppServer**YourDataDirectory*\Documents.
- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in Community Development. Then, choose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Contractor Options

- **Enable Contractor PIN**: This option is not used.
- **Verify Contractor when selected from 'Lookup From' on Search/Scan screen**: The user is notified if any of the following dates have expired: state license (registration number expiration date), licensing agency, or insurance (Workers Compensation and Liability).
- **Ignore Any License Date Check when the Field is Empty**: Ignores any of the following fields during the contractor verification process if the fields are empty: state license, licensing agency, or insurance (Workers Compensation and Liability). The user is only notified if a field has a date that is expired. To use this feature, you must select the **Verify Contractor when selected from 'Lookup From' on Search/Scan screen** check box.
- **Check for Expired Date in AEC to Flag Contact**: Select this check box if you want an alert icon to appear in the **Contacts** pane in Community Development for contractors with an expired state license. Clear this check box if you do not want the alert icon to appear.
- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for Microsoft Word documents to read-only when attached to a record.
- **Disable Attachments DELETE**: Disables users' ability to delete attachments (this feature overrides the user's privileges). Does not apply to System Administrators.

- **Disable Print Queue (Show Only the Current Record)**: By default, the Community Development print feature provides the user with the ability to queue up documents from different records within the same module and then print them all simultaneously. By selecting this system preference, the print queue is disabled and the user is only able to print documents from the current record.
- **Link AEC Types to Prefixes**: Provides the ability to generate prefix-based record numbers. Select **Link AEC Types to Prefixes** and then create an autogen number for each Entity Management type. The name/description of the autogen number must begin with **AEC_** (for example, AEC_Attorney).
- **Default Status for New AEC Record**: Defines the default status when an Entity Management record is created.

  If you use eTRAKiT, the value in the eTRAKiT **New Status** field overrides this WUM setting for entity applications submitted in eTRAKiT. The **New Status** field is in eTRAKiT Administrator **Entity Management** > **Application** > **Custom**.
- **Delete AEC**: Deletes the specified Entity Management record.

The following Entity Management preferences allow you to customize the standard field labels:

- **Change Label for Company Information**: Replaces **FEIN or SSN** with customized label (main information pane).
- **Change Label for License Types**: Replaces **License Types** with customized label (**License Types** pane).

Sub-Screens

Record Sub-Screens Indicators: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:

- **No indicator**: Only the title appears (for example, **Contacts**)
- **Asterisk indicator**: An asterisk (*) appears after the pane title (for example, **Contacts***)
- **Record Count Indicators**: The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)

Citizen Engagement

Use these settings to customize views and actions on your Citizen Engagement Portal. These options appear only if you enabled the Citizen Engagement Portal by selecting the **Reveal Citizen Engagement Module** option in **System Settings**.

Citizen Engagement settings include the following functional areas:

- Geo
- Permits

- Projects
- Code
- Licenses
- CRM
- AEC
- Inspections
- System

Geo

Geo settings include the following pages:

- Search Filters
- Tab Maintenance

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select + and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select × in the row for the search filter you want to remove.

For Land Management records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Type**: Select if you want to define a rule based on the record type.
  - **Status**: Select if you want to define a rule based on the record status.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
  - If you selected **Type** in the **FieldName** column, the options are the geo types that you set up on the **Module Configuration** > **Land Management** > **Geo Type List** page.

- If you selected **Status** in the **FieldName** column, the options are the Land Management record status values that you set up on the **Module Configuration** > **Land Management** > **Status List** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

Permits

Permits settings include:

- Applications
- Attachments
- Preferences
- Required Fields
- Restrict Type/SubType
- Search Filters
- Tab Maintenance
- Type Specific Preferences

Applications

Use this page to define settings for the permit application process on the Citizen Engagement Portal.

The **Defaults** section includes the following options:

- **Set default prefix when submitting a new permit application**: Type the prefix you want Community Development to assign to permit numbers when the permit is added through the Citizen Engagement Portal. If you leave this blank, the default prefix is used.
- **Set default status when submitting a new permit application**: Type the status you want Community Development to assign to permits added through the Citizen Engagement Portal. If you leave this blank, the default prefix is used.

The **Customize Application** section includes options for customizing users' searches for permit locations and the message that appears when an applicant cannot be set as confidential:

- **Enable Address Entry**: Select this check box allow applicants to type an address if the permit location is not listed in search results. Clear this check box if you want applicants to always choose from search results.
- **Enable Parcel Search**: Select this check box to allow applicants to search by parcel number to find the permit location. Clear this check box to disable search by parcel number. If you select this option, a search-by field appears so the applicant can choose to search by address or parcel.
- **Set label for Parcel Search**: If you enabled parcel search, type the text for the drop-down list item that applicants will select to perform a search by parcel number. For example, type **Parcel** or **Site APN**.

- **Set error message to display when applicant cannot be set as confidential**: Type the message that appears when the applicant cannot be set as confidential.

  Note: When an applicant is set as confidential, asterisks appear on the screen in place of the applicant's name when someone other than the applicant views the permit details.

Attachments

Use this page to define options for allowing users to upload attachments for permits through the Citizen Engagement Portal. This page includes the following options:

- **Users who can upload attachments**: Select one of the following options:
  - **Require Contractor Login**: Select this option to allow only registered, logged-in contractors to upload attachments.
  - **Require Self-Registration**: Select this option to allow only registered, logged-in public users to upload attachments.
  - **Either**: Select this option to allow registered, logged-in public users, and contractors to upload attachments.

    Note: Your selection in this field applies only if you select the **Allow attachments to be uploaded** check box.
- **Allow attachments to be uploaded**: Select this check box to allow users to upload attachments for permits. Clear this check box if you do not want to allow users to upload attachments.
- Status listing: This listing includes all the status options defined in your system for permits. Select the **Allow** check box for a status if you want to allow users to upload attachments when the permit has that status. Your selections apply only if you selected the **Allow attachments to be uploaded** check box.

Preferences

The Preferences page includes the following options:

- **Enable Print Permit Link**: Select this check box to show the printer icon and link after a user selects a permit number from the dashboard. Clear this check box if you do not want to show the printer icon and link.
- **Force Print Permit to use a hard-coded 'ISSUED' Permit Status**

Required Fields

The **Required Fields** group contains multiple pages. Select or clear check boxes on these pages to define which fields appear and which fields are required for a permit application.

On the **Contacts** page, select a contact type from the **Contact Type** field. Then, select the fields that you want to appear and be required when this contact type is added to a permit.

> **Note:** The **Contact Type** field lists the types of contacts you added to permit types in Permitting.

On the **Options** page, select check boxes for additional fields you want to appear and be required during the permit application process.

Use the **UDFs** page to select the custom fields you want to require during the permit application or renewal process. For example, you might want to require fields that are used to calculate fees so that fees are calculated correctly.

All the fields on custom screens appear during the permit application or renewal process but only the fields you select on this page are required.

> **Note:** Fields you select as required on the **UDFs** page are also required in eTRAKiT or Citizen Engagement if the custom screen is available in eTRAKiT or Citizen Engagement based on the screen name. See Custom Screens for more information about naming screens for use in eTRAKiT or Citizen Engagement.

The **UDFs** page includes the following options:

- **Type** field: This field lists the types of permits you set up on the **Permitting** > **Permit Types** > **Type List** page. Select a permit type.
- **Custom Screen** field: If you defined custom screens for the permit type you selected, the custom screens are listed in this field. Select a custom screen.
- **Required** column: Select the check box for the fields that you want to require during the permit application and renewal process.

Restrict Type/SubType

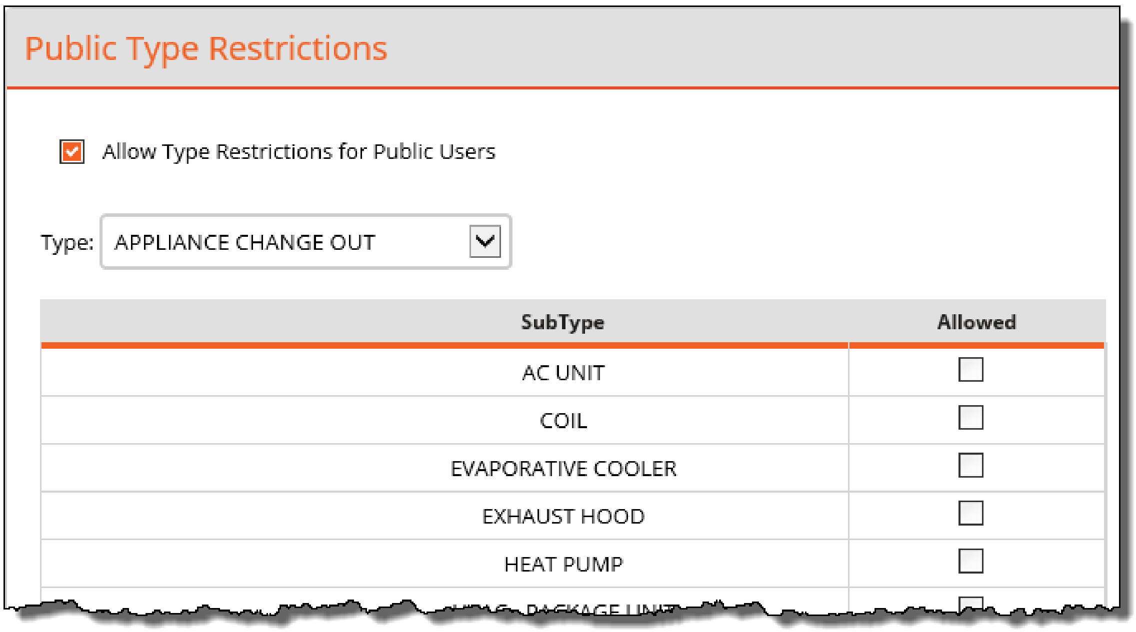
Use this page to set which permit subtypes public users and contractors can select when applying for a permit through the Citizen Engagement Portal.

The **Public Type Restrictions** section includes the following options:

- **Allow Type Restrictions for Public Users**: Select this check box to restrict subtypes that public users can apply for when applying for a permit through the Citizen Engagement Portal. Clear this check box if you want to allow all subtypes.

The following options apply only if you selected the **Allow Type Restrictions for Public Users** check box.

- **Type**: Select a permit type to work with.
- **Subtype listing**: This listing includes all the permit subtypes defined in your system for the permit type you selected in the **Type** field. Select the **Allowed** check box for each permit subtype you want to make available to users who apply for permits through the Citizen Engagement Portal. Clear the check box for each permit subtype you do not want to make available on the Citizen Engagement Portal.



The **Contractor Type Restrictions** section includes the following options:

- **Allow Type Restrictions for Contractors**: Select this check box to restrict permit subtypes that contractors can apply for when applying for a permit through the Citizen Engagement Portal. You can restrict permit subtypes by AEC type and AEC subtype. Clear this check box if you want to allow all AECs to apply for any permit subtype.

The following options apply only if you selected the **Allow Type Restrictions for Contractors** check box.

- **AEC Type**: Select the AEC type you want to work with.
- **AEC SubType**: Select the AEC subtype you want to work with.
- **Type**: Select a permit type to work with.

- **Subtype listing**: This listing includes all the permit subtypes defined in your system for the permit type you selected in the **Type** field. Select the **Allowed** check box for each permit subtype you want to make available to the selected AEC type and subtype when an AEC applies for a permit through the Citizen Engagement Portal.

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select + and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select × in the row for the search filter you want to remove.

For Permitting records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **Type**: Select if you want to define a rule based on the record type.
  - **SubType**: Select if you want to define a rule based on the record subtype.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
  - If you selected **Status** in the **FieldName** column, the options are the permit record status values that you set up on the **Module Configuration** > **Permitting** > **Status List** page.
  - If you selected **Type** in the **FieldName** column, the options are the permit types that you set up on the **Module Configuration** > **Permitting** > **Permit Types** > **Type List** page.
  - If you selected **SubType** in the **FieldName** column, the options are the permit subtypes that you set up on the **Module Configuration** > **Permitting** > **Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

Type Specific Preferences

Use this page to set options by permit type for permit applications:

- **Permit Type**: Select the permit type you want to work with.

- **Create Permit If Zero Balance**: Select **TRUE** to allow users to apply for a permit with a fee balance of $0. Select **FALSE** to require a total fee balance greater than $0 for permit applications.
- **Validate Job Value**: Select **TRUE** to enable validation of the job value based on the AEC maximum job value. Validation ensures that the job value of the permit does not exceed the maximum job value in effect for the contractor. Select **FALSE** to disable job value validation.

  Note: Validation applies to logged-in contractors only.

Select **Save** before you select a different permit type.

Projects

Projects settings include:

- Required Fields
- Restrict Type/SubType
- Search Filters
- Tab Maintenance

Required Fields

The **Required Fields** group contains the **Contacts** page.

On the **Contacts** page, select a contact type from the **Contact Type** field. Then, select the fields that you want to appear and be required when this contact type is added to a project.

> **Note:** The **Contact Type** field on this page lists the types of contacts you added to project types in Projects and Planning.

Restrict Type/SubType

Use this page to set which project subtypes public users and contractors can select when applying for a project through the Citizen Engagement Portal.

The **Public Type Restrictions** section includes the following options:

- **Allow Type Restrictions for Public Users**: Select this check box to restrict subtypes that public users can apply for when applying for a project through the Citizen Engagement Portal. Clear this check box if you want to allow all subtypes.

The following options apply only if you selected the **Allow Type Restrictions for Public Users** check box.

- **Type**: Select a project type to work with.
- **Subtype listing**: This listing includes all the project subtypes defined in your system for the project type you selected in the **Type** field. Select the **Allowed** check box for each project subtype you want to make available to users who apply for project through the Citizen Engagement Portal. Clear the check box for each project subtype you do not want to make available on the Citizen Engagement Portal.

The **Contractor Type Restrictions** section includes the following options:

- **Allow Type Restrictions for Contractors**: Select this check box to restrict project subtypes that contractors can apply for when applying for a project through the Citizen Engagement Portal. You can restrict project subtypes by AEC type and AEC subtype. Clear this check box if you want to allow all AECs to apply for any project subtype.

The following options apply only if you selected the **Allow Type Restrictions for Contractors** check box.

- **AEC Type**: Select the Entity Management type you want to work with.
- **AEC SubType**: Select the Entity Management subtype you want to work with.
- **Type**: Select a project type to work with.
- **Subtype listing**: This listing includes all the project subtypes defined in your system for the project type you selected in the **Type** field. Select the **Allowed** check box for each project subtype you want to make available to the selected AEC type and subtype when an AEC applies for a project through the Citizen Engagement Portal.

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select + and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select × in the row for the search filter you want to remove.

For Projects and Planning records, rules include the following options:

- **FieldName**: Select one of the following options:FieldName: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **Type**: Select if you want to define a rule based on the record type.
  - **SubType**: Select if you want to define a rule based on the record subtype.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
  - If you selected **Status** in the **FieldName** column, the options are the projects and planning record status values that you set up on the **Module Configuration** > **Projects and Planning** > **Status List** page.
  - If you selected **Type** in the **FieldName** column, the options are the project types that you set up on the **Module Configuration** > **Projects and Planning** > **Project Types** > **Type List** page.
  - If you selected **SubType** in the **FieldName** column, the options are the project subtypes that you set up on the **Module Configuration** > **Projects and Planning** > **Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

Code

Code settings include:

- Attachments
- Required Fields
- Search Filters
- Tab Maintenance

Attachments

Use this page to define options for allowing users to upload attachments for code compliance cases through the Citizen Engagement Portal. This page includes the following options:

- **Users who can upload attachments**: Select one of the following options:
  - **Require Contractor Login**: Select this option to allow only registered, logged-in contractors to upload attachments.
  - **Require Self-Registration**: Select this option to allow only registered, logged-in public users to upload attachments.
  - **Either**: Select this option to allow registered, logged-in public users and contractors to upload attachments.

  Note: Your selection in this field applies only if you select the **Allow attachments to be uploaded** check box.
- **Allow attachments to be uploaded**: Select this check box to allow users to upload attachments for code compliance cases. Clear this check box if you do not want to allow users to upload attachments.

Required Fields

The **Required Fields** group contains the **Contacts** page.

On the **Contacts** page, select a contact type from the **Contact Type** field. Then, select the fields that you want to appear and be required when this contact type is added to a project.

Note: The **Contact Type** field on this page lists the types of contacts you added to case types in Code Compliance.

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select + and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select × in the row for the search filter you want to remove.

For Code Compliance records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **Type**: Select if you want to define a rule based on the record type.
  - **SubType**: Select if you want to define a rule based on the record subtype.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
  - If you selected **Status** in the **FieldName** column, the options are the code compliance record status values that you set up on the **Module Configuration** > **Code Compliance** > **Status List** page.
  - If you selected **Type** in the **FieldName** column, the options are the case types that you set up on the **Module Configuration** > **Code Compliance** > **Case Types** > **Type List** page.
  - If you selected **SubType** in the **FieldName** column, the options are the case subtypes that you set up on the **Module Configuration** > **Code Compliance** > **Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

Licenses

Licenses settings include:

- Attachments
- Preferences
- Required Fields

- [Search Filters]
- [Tab Maintenance]

Attachments

Use this page to define options for allowing users to upload attachments for licenses through the Citizen Engagement Portal. This page includes the following options:

- **Users who can upload attachments**: Select one of the following options:
  - **Require Contractor Login**: Select this option to allow only registered, logged-in contractors to upload attachments.
  - **Require Self-Registration**: Select this option to allow only registered, logged-in public users to upload attachments.
  - **Either**: Select this option to allow registered, logged-in public users and contractors to upload attachments.

  Note: Your selection in this field applies only if you select the **Allow attachments to be uploaded** check box.

- **Allow attachments to be uploaded**: Select this check box to allow users to upload attachments for licenses. Clear this check box if you do not want to allow users to upload attachments.

Preferences

The **Preferences** page includes the following option:

- **Enable Print License Link**

Required Fields

The **Required Fields** group contains multiple pages.

Select or clear check boxes on these pages to define which fields appear and which fields are required for a license application.

On the **Address** page, select check boxes for address fields you want to appear and be required during the license application process.

On the **Contacts** page, select a contact type from the **Contact Type** field. Then, select the fields that you want to appear and be required when this contact type is added to a license.

Note: The **Contact Type** field lists the types of contacts you added to license types in Licensing.

On the **Info Fields** page, select check boxes for information fields you want to appear and be required during the license application process. The fields on this page are the fields you set up on the Licensing **Captions/List** page.

Use the **UDFs** page to select the custom fields you want to require during the license application or renewal process. All the fields on custom screens appear during the license application or renewal process but only the fields you select on this page are required.

Note: Fields you select as required on the **UDFs** page are also required in eTRAKiT or Citizen Engagement if the custom screen is available in eTRAKiT or Citizen Engagement based on the screen name. For more information about naming screens for use in eTRAKiT or Citizen Engagement, see Custom Screens.

The **UDFs** page includes the following options:

- **Type** field: This field lists the types of licenses you set up on the Licensing > **License Types** > **Type List** page. Select a license type.
- **Custom Screen** field: If you defined custom screens for the license type you selected, the custom screens are listed in this field. Select a custom screen.
- **Required** column: Select the check box for the fields that you want to require during the license application and renewal process.

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select + and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select × in the row for the search filter you want to remove.

For Licensing records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **Type**: Select if you want to define a rule based on the record type.
  - **SubType**: Select if you want to define a rule based on the record subtype.

- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
    - If you selected **Status** in the **FieldName** column, the options are the licensing record status values that you set up on the **Module Configuration** > **Licensing** > **Status List** page.
    - If you selected **Type** in the **FieldName** column, the options are the license types that you set up on the **Module Configuration** > **Licensing** > **License Types** > **Type List** page.
    - If you selected **SubType** in the **FieldName** column, the options are the license subtypes that you set up on the **Module Configuration** > **Licensing** > **Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

CRM

CRM settings include the **Search Filters** page.

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select **+** and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select **×** in the row for the search filter you want to remove.

For CRM records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **Type**: Select if you want to define a rule based on the record type.
  - **SubType**: Select if you want to define a rule based on the record subtype.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.
- **Value**: Select a value for the field you selected in the **FieldName** column.
  - If you selected **Status** in the **FieldName** column, the options are the CRM record status values that you set up on the **Module Configuration** > **CRM** > **Status List** page.
  - If you selected **Type** in the **FieldName** column, the options are the issue types that you set up on the **Module Configuration** > **CRM** > **Issue Types** > **Type List** page.
  - If you selected **SubType** in the **FieldName** column, the options are the issue subtypes that you set up on the **Module Configuration** > **CRM** > **Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

AEC

AEC settings include:

- Required Fields
- Search Filters
- Tab Maintenance
- Validation Settings

Required Fields

The **Required Fields** group includes multiple pages.

Select or clear check boxes on these pages to define which fields appear and which fields are required during AEC setup.

On the **AEC** page, select check boxes for the fields you want to appear and be required during AEC account setup.

Example: If you make the selections shown below, the address line 1 and address line 2 fields both appear on the AEC account setup page. Address line 1 is required but address line 2 is not required.

Field	Required	Visible
Address1	☑	☑
Address2	☐	☑

On the **Contacts** page, select a contact type from the **Contact Type** field. Then, select the fields that you want to appear and be required when a contractor adds this contact type to his or her account.

> **Note:** The **Contact Type** field on this page lists the types of contacts you selected as AEC contacts on the AEC **Contacts** page.

Search Filters

Use the **Search Filters** page to set up rules that define whether certain records appear in search results when users search for records in the Citizen Engagement Portal. For example, you might want to exclude inactive records from search results or include active records only.

You can set up multiple rules. All the rules you set up are always followed when Community Development processes and displays search results.

To add a search filter, select **+** and then select options in the **FieldName**, **Command**, and **Value** columns.

To remove a search filter, select **×** in the row for the search filter you want to remove.

For Entity Management records, rules include the following options:

- **FieldName**: Select one of the following options:
  - **Status**: Select if you want to define a rule based on the record status.
  - **SubType**: Select if you want to define a rule based on the record subtype.
  - **Type**: Select if you want to define a rule based on the record type.
- **Command**: Select **IN** to define a rule to *include* records based on the field you selected in the **FieldName** column. Select **NOT IN** to *exclude* records based on the field you selected in the **FieldName** column.

- **Value**: Select a value for the field you selected in the **FieldName** column.
    - If you selected **Status** in the **FieldName** column, the options are the Entity Management record status values that you set up on the **Module Configuration** > **AEC** > **Status List** page.
    - If you selected **Type** in the **FieldName** column, the options are the AEC types that you set up on the **Module Configuration** > **AEC** > **AEC Types** > **Type List** page.
    - If you selected **SubType** in the **FieldName** column, the options are the AEC subtypes that you set up on the **Module Configuration** > **AEC** > **AEC Subtypes** page.

Examples:

The following rule excludes records with a status of **INACTIVE**. Records with an inactive status are not included in search results.

FieldName	Command	Value
Status	NOT IN	INACTIVE

The following rules include records with a status of **ACTIVE**, **HISTORICAL**, or **PENDING**. Records with any of these status values are included in search results, but records with other status values are excluded.

FieldName	Command	Value
Status	IN	ACTIVE
Status	IN	HISTORICAL
Status	IN	PENDING

Tab Maintenance

Use this page to set which tabs are visible to public users and contractors who are logged in to the Citizen Engagement Portal. These tabs correspond to the information panes in Community Development.

The **Tab** column lists the tabs that are available.

In the **Public Visible** column, select the check box corresponding to each tab you want public users to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to public users.

In the **Contractor Visible** column, select the check box corresponding to each tab you want contractors to see when they are logged in to the Citizen Engagement Portal. Clear the corresponding check box for tabs that you do not want to show to contractors.

Validation Settings

Use this page to define the Entity Management data that Community Development checks when a contractor logs in.

- **Current Status of License**: Select this check box if you want Community Development to compare the AEC license status against the status you select in the **Select status needed on license** field on this page. If the AEC license status does not match the status you select, a message appears when the contractor logs in. Clear this check box if you do not want Community Development to compare the AEC license status against the status you select in the **Select status needed on license** field.
- **License Expiration**: Select this check box if you want Community Development to check whether the AEC license expired. If you select this check box and the AEC license expired, a message appears when the contractor logs in. Clear this check box if you do not want Community Development to check the AEC license expiration.
- **Worker's Compensation Expiration**: Select this check box if you want Community Development to check whether the AEC’s worker’s compensation insurance expired. If you select this check box and the worker’s compensation insurance expired, a message appears when the contractor logs in. Clear this check box if you do not want Community Development to check the AEC’s workers compensation insurance expiration.
- **Liability Insurance Expiration**: Select this check box if you want Community Development to check whether the AEC’s liability insurance expired. If you select this check box and the liability insurance expired, a message appears when the contractor logs in. Clear this check box if you do not want Community Development to check the AEC’s liability insurance expiration.

If you selected the **Current Status of License** check box, select the status you want to compare to the AEC license status in the **Select status needed on license** field.

Inspections

Inspections settings include the following pages:

- Cutoff Time
- Preferences

Cutoff Time

Use this page to set preferences for allowing users to schedule and cancel inspections on the Citizen Engagement Portal.

The **Schedule** section includes the following options for scheduling inspections:

- **Minimum Days in Advance**: Type the minimum number of days before an inspection that an inspection can be scheduled. Type 0 to allow same-day scheduling, type 1 for the next business day, and so on.

  If a user requests an inspection after the time in the **Cutoff Time** field, the current day is not included in the minimum number of days.
- **Maximum Days in Advance**: Type the maximum number of days before an inspection that the inspection can be scheduled.

  Nonwork days and holidays defined in the Agency Calendar are excluded when counting minimum and maximum days. If the inspector has daily caps set in WUM, the inspector's available work days (defined in the inspector's calendar in Community Development) are considered in the count. Refer to the Agency Calendar and Inspection Caps topics for more information.
- **Cutoff Time**: Enter the cut-off time for counting the current day towards the inspection minimum days advance notice when users schedule inspections. Type the time in one of the following formats: 01:00 PM, 01:00PM, 1:00 PM, or 1:00 PM.
- **Include Weekends in Count**: Select this option if you want to include weekend days as business days when counting minimum and maximum days. Clear this option if you want to count business days only.
- **Hide Time Selection**: Select this check box if you do not want to show the **Time** field during an inspection request. This setting also applies to a permit application inspection request. If you select this check box, users can schedule the day of the inspection but not the time. Clear this check box to allow users to schedule an inspection time.

The **Cancel** section includes the following options for canceling inspections:

- **Cutoff Time**: Define the cut-off time for canceling inspections by selecting the hour, minutes, AM or PM, and whether the deadline is the day of the inspection or the day before the inspection.
- **Cutoff Date Type**: This field applies only if the cancel cut-off day is **Day Before Inspection**. Select one of the following options:
  - **Work Dates**: Exclude nonworkdays and holidays as defined in the agency calendar when determining the cutoff day.
  - **Calendar Days**: Include nonworkdays and holidays when determining the cutoff day.

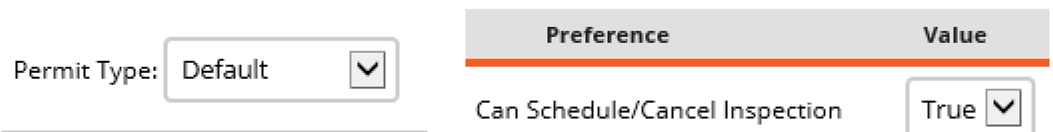
Preferences

Use this page to set inspection preferences by permit type and inspection type.

This page includes the following options:

Note: Select **Save** after making all your selections for a specific permit and inspection type. If you change the permit type or inspection type before you save, you will lose your selections.

- **Group**: The only value for this field is **Permit**.
- **Permit Type**: Select a permit type to work with or select **Default**. If you select **Default**, the preferences you set apply to all permit types except for permit types that you specifically set up.
- **Can Schedule/Cancel Inspection**: Select **True** if you want to allow users to schedule and cancel inspections for this permit type. Select **False** if you do not want to allow users to schedule and cancel inspections for this permit type.



- **Inspection Type**: Select an inspection type to work with.
- **Can Schedule/Cancel Inspection**: Select **True** if you want to allow users to schedule and cancel inspections for this inspection type. Select **False** if you do not want to allow users to schedule and cancel inspections for this inspection type.

- Permit status selections: Use the listings to allow or restrict inspection scheduling and cancellation by permit status. The **Status** listing shows all of the permit status values defined in your system. The **Statuses Allowed to Schedule/Cancel** listing shows all the status values a permit can have to allow users to schedule or cancel inspections.

  To add a status to the **Statuses Allowed to Schedule/Cancel** listing, drag the status from the **Status** listing to the **Statuses Allowed to Schedule/Cancel** listing.

  To remove a status from the **Statuses Allowed to Schedule/Cancel** listing, select × in the row for that status.

System

System settings include the **System Users** page.

System Users

Use this page to define the users that are assigned in Community Development for activity performed by public and contractor users on the Citizen Engagement Portal. These users must also be defined on the **User Administration** > **User Names** page with the **Access** column set to **ADMIN**.

Example: On this page, you type **CECU** for the contractor user ID. Then, a contractor logs in to the Citizen Engagement Portal using his personal login credentials and pays a fee on a permit. When this activity is posted to Community Development, the user for that payment shows as **CECU**.

The **Public User** section includes the following options:

- In the **ID** field, type the user ID to assign to activity performed by public users on the Citizen Engagement Portal.
- In the **Password** field, type the password for Community Development to use when logging activity for actions performed by public users on the Citizen Engagement Portal.
- If a user with the user ID you entered in the **ID** field is not set up in **User Administration** > **User Names**, the **Create User** button appears. Select this button and complete fields to set up the public user. For more details about setting up users, see Adding a Community Development user.

The **Contractor** section includes the following options:

- In the **ID** field, type the user ID to assign to activity performed by contractor users on the Citizen Engagement Portal.
- In the **Password** field, type the password for Community Development to use when logging activity for actions performed by contractor users on the Citizen Engagement Portal.
- If a user with the user ID you entered in the **ID** field is not set up in **User Administration** > **User Names**, the **Create User** button appears. Select this button and complete fields to set up the contractor user. For more details about setting up users, see Adding a Community Development user.

Note: If you change a user ID or password on this page, Community Development automatically updates the corresponding user on the **User Administration** > **User Names** page. For more information about using the **User Names** page, see the User Names section.

Module-Specific Internet Links

Internet Links contains the list of system-wide websites accessible through Community Development's Internet Links feature. Community Development enables you to define either global or module-specific links. To create a module-specific link:

1. Open **Module Configuration** > *module* > **Internet Links**.
2. Select **Add** and then select a category:
   - **Internet Links**: Accessible through **Internet Links** feature.
   - **Code Search Links**: Accessible through the **Links** button on the Notes screen in Code Compliance.
   - **Imaging Links**: Accessible through **Imaging Links** feature.
3. Enter a title or description for the link.
4. Enter the URL.

Special tags can be used in URLs that will allow Community Development to pass data to the website. General tags will work with {all} groups and will map to listed database fields. Tags must be contained in braces { }.

{RECORD_NUMBER}: PERMIT_NO (Permitting), PROJECT_NO (Projects and Planning), CASE_NO (Code Compliance), BUS_LIC_NO (Licensing), ST_LIC_NO (AEC), SITE_APN (Land Management)

{RECORD_TYPE}: PERMITTYPE, PROJECTTYPE, CASETYPE, BUSINESS_TYPE, AECTYPE, GEOTYPE

{SITE_APN}: SITE_APN (all modules). If not present will return blank.

{{SITE_APN}}: SITE_APN (all modules). Will reformat value to the parcel formatting specified in **System Settings** > **APN**.

{LOC_RECORDID}: LOC_RECORDID (all modules). If not present will return blank.

{RECORD_GROUP}: Will return group PERMIT, PROJECT, CASE, LICENSE, AEC, PARCEL.

Specific Community Development database fields can be used to pass data to the website. Database fields must be contained in braces { }:

Permitting: {PERMIT_NO}, {PERMITTYPE}

Projects and Planning: {PROJECT_NO}, {PROJECTTYPE}

Code Compliance: {CASE_NO}, {CASETYPE}

Licensing: {BUS_LIC_NO}, {BUSINESS_TYPE}, {BUSINESS_NO}

AEC: {ST_LIC_NO}, {AECTYPE}

Land Management: {GEOTYPE}

Violations

Violations provides the ability to associate one or more violations per Code Compliance case record. To add, modify, or delete violation types, go to the **Module Configuration** > **Code Compliance** > **Violation Types** page.

Adding a violation type

1. Select + next to the field.
2. Type the violation title.
3. Type the violation description.
4. Select **Save**.

Violations are sorted alphanumerically.

Adding a location

1. Select + next to the **Locations** field.
2. Type the location description.
3. Select **Save**.

Adding a violation status

1. Select + next to the **Status** field.
2. Type the status title.
3. Select **Save**.

(Optional) Add Custom Screens. For more information about configuring custom screens, see Custom Screens.

Group or categorize violations

To group or categorize violations, complete the following steps:

1. On the **Violation Types** page, select **Grouped Violation Types**.
2. Select +.
3. Type the group name.
4. Select **Save**.
5. Drag violations from the **MASTER Violation List** to the **Violation Group**.

6. To reorder violations in the **Violation Group**, drag violations to another place in the list.
7. Select **Save**.

Violations not added to a agency-defined group are included in the **All** group.

To define the list of available documents that can be printed from the **Violations** pane, place the documents/reports in the //*app server*/Documents/VIOLATIONS/CASE_VIOLATIONS folder.

User Administration

This area enables you to provide and control access to Community Development and its functions.

User Administration includes the following functional areas:

- **User Administration**: Set up individual users and view user activity.
- **Group Administration**: Define groups and privileges for the groups.

User Administration

Use options in this area to set up individual users and user groups and to view user activity.

Access to Community Development is based on access level and group assignments. You assign users an access level—**ADMIN**, **USER**, **OBSERVER**, or **INACTIVE**. For users assigned the **USER** access level, you set up groups with selected privileges and then assign users to one or more groups.

This area includes the following pages:

- User Names: Add, change, or delete individual user accounts.
- User Groups: Assign users with the **USER** access level to groups that grant the users access privileges.
- OpenID Logins: Maintain user login IDs that can be used with OpenID.
- Current Activity: View a list of all logged-in users.
- Login Activity: View a list of login attempts.
- SSRP Activity: View SSRP (SQL Server Resolution Protocol) activity.

User Names

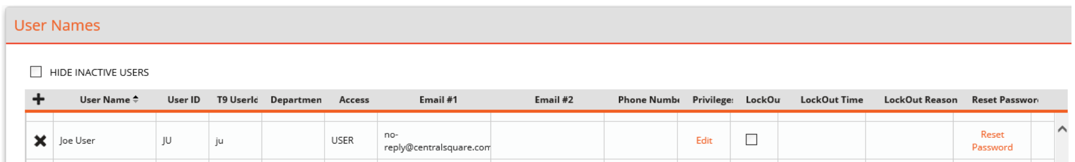
On the **User Names** page, you can add, change, and delete Community Development user accounts. You can also lock out a user or initiate a password reset.

Adding a Community Development user

1. Go to **User Administration** > **User Names**.
2. Select **+**.
3. Enter the user name (maximum 30 characters).
4. Enter a user ID. User IDs must:
   - Be unique
   - Have a maximum of six characters

- Contain letters and/or numbers only (no special characters)

5. Enter a password (maximum 30 characters, no leading or trailing spaces, and no special characters other than those on a standard keyboard). If password case sensitivity is needed, contact the Community Development support team. Community Development includes the ability to mask or hide passwords. This feature is enabled through the Community Development key. To reset a password using this feature, select **Reset Password** and enter a temporary password. The user will then log in to Community Development and enter a new or updated password.



6. If you want to designate a department this user works in, select a department.
7. Select an access level:
   - **ADMIN**: Application administrator. Users at this level have access to all Community Development modules and functions. Admin users also have access to WUM. Privileges are set by default and these users cannot be added to user groups.
   - **USER**: Users at this level have access to modules and functions as defined by assigned groups. After you add a user with this access level, you must assign the user to one or more groups.
   - **OBSERVER**: Users at this level have read-only access to all modules. Privileges are set by default and these users cannot be added to user groups.
   - **INACTIVE**: This level disables the user's account and removes the user's name from all Community Development roles (inspector, reviewer, project manager, or officer). If the account becomes active with **ADMIN** or **USER** access, the user must be reassociated with previously held Community Development roles (inspector, reviewer, project manager, or officer).
8. In **Email #1**, enter the user's primary email address. If you use the Auto Emails by Type and Status feature, **Email #1** is required.
9. If the user has a secondary email address, enter it in **Email #2**.
10. If you want to include a phone number for the user, enter it in **Phone Number**.
11. If you use Windows Login, enter the Windows ID for the user account.
12. Select **Save**.
13. Users assigned the **USER** access level are not automatically assigned any privileges, which in effect grants them observer access only. To assign the user to one or more groups with

additional access privileges, go to the **User Groups** page. For more information, see User Groups (page 174).

Changing user details

To change details for a user, select the field in the user's row and enter the update. After you update all the fields you want to change, select **Save**.

Deleting a user

To delete a user, select × in the user's row. In the confirmation dialog box, select **OK**.

Locking out a user

To lock out a user, select the **LockOut** check box in the user's row. You can enter a reason for the lockout in **LockOut Reason**. Then, select **Save**.

When the **LockOut** check box is selected, the user cannot log in to any of the Community Development applications.

User Groups

Use this page to assign groups to a user with the **USER** access level. User groups grant users a common set of privileges for accessing Community Development functions.

You can also remove group privileges on this page.

Only users with an access level of **USER** appear on this page. Privileges for users with other access levels—**ADMIN**, **OBSERVER**, or **INACTIVE**—are assigned automatically.

Note: To set up, change, or delete privileges for a group, go to Group Administration.

To change group assignments for a user, complete the following steps:

1. Go to **User Administration** > **User Groups**.
2. Select a user name in the listing. A listing of groups appears on the right.
3. Select a group's check box to assign the user to that group. Clear the group's check box to remove the user from that group.
4. Select **Save**.
5. To change group assignments for another user, select the user's name in the user listing on the left. Then, repeat steps 3 and 4.

OpenID Logins

This page enables you to add, edit, or delete a login ID that can be used with OpenID.

Note: This page is not currently used.

Current Activity

This page displays a list of all logged-in users or all users with their current status (logged in or not logged in). The list can be filtered by department or currently logged-in users.

Filtering by department

1. Select the department from **Filter by Department**.
2. Select **Refresh**.

Displaying a list of users currently logged on

1. Select the **Display Users Currently Logged On** check box.
2. Select **Refresh**.

The **Filter by Department** and **Display Users Currently Logged On** options can be combined to display a list of logged-on users for a specific department.

To end a currently logged-on user's session, select × in the **FORCEOUT** column for the user. Select **OK** in the dialog box and then select **Save**. The next time the user tries to perform any action, the user is logged out.

Login Activity

Use this page to view a list of users who tried to log in to Community Development and the result of the login attempt. The list reflects data in the activity log file.

By default, the list for the current day appears. To change the date, select a date in the **Choose a date for activity log file** field and then select .

You can change the order of the rows in this listing by dragging a row to a different position. Any changes you make are temporary and are not saved to the activity log.

SSRP Activity

Use this page to view SSRP (SQL Server Resolution Protocol) activity such as password resets. By default, the list for the current day appears. To change the date, select a date in the date field above the activity listing and then select .

The listing includes the following fields:

- **Date Time**: Date and time the activity occurred.
- **User ID**: User ID of the user who performed the activity.
- **Invitation**: Description of the SSRP activity. Activity other than new user, forgot password, and password reset by the administrator is indicated by **Unknown**.
- **Success**: Result of the activity. **True** indicates the activity was successful. **False** indicates the activity was not successful.
- **Remarks**: Additional information about the activity.

You can change the order of the rows in this listing by dragging a row to a different position. Any changes you make are temporary and are not saved to the activity log.

Group Administration

Group Administration provides the ability to define a standard set of Community Development privileges that can be applied to users based on their assigned department or functional area.

Changes to the group privileges apply to all users assigned to the group. Users can be added to the group or removed from the group as needed.

Groups apply only to users with the **USER** access level. By default, when you add a user with the **USER** access level, the new user has observer access only and must be assigned to a group for additional privileges.

Groups can be enabled (active) or inactive (not enabled). When a group is enabled, the privileges apply to users assigned to that group. When a group is inactive, the privileges in that group are ignored.

If a user is assigned to multiple groups, privileges are cumulative. Any privilege granted in any group is available to the user.

Example: A user is in three groups. One group has the **PROJ : BOND_FULL_ACCESS** privilege, another group has **PROJ : CAN_EDIT_BOND**, and the third group has no bond privileges. The user will have full access to bonds functions.

Adding a group

1. Go to **User Administration** > **Group Administration** > **Group List**.
2. Select **+**.
3. Enter the group name.
4. If you want to include a description of the group, enter it in **Description**.

5. By default, the **Enabled** check box is selected, making the group active. If you do not want the group to be active, clear the check box.

   If a group is not enabled, the group name appears in gray text in the navigation pane.

6. Select **Save**.

Assigning privileges to a group

1. Go to **User Administration** > **Group Administration**.
2. In the navigation pane, select the group name.

   If a group is not enabled, the group name appears in gray text in the navigation pane.

3. By default, no privileges are selected when you add a group. In each section, select the privileges to apply to the group. For a list of Community Development privileges and their definitions, see Available privileges.
4. Select **Save**.

Deleting a group

To delete a group:

1. Go to **User Administration** > **Group Administration** > **Group List**.
2. Select × in the group's row.
3. In the confirmation dialog box, select **OK**.
4. Select **Save**. The group is deleted and the privileges associated with that group are no longer valid for users who were assigned to that group.

User Privileges

Use these options to allow or prevent user access to modules and functions.

A user account must be added in **User Preferences** > **User Names** before you can assign user privileges.

To assign user privileges:

1. Select the user's name from the navigation pane.
2. Add either group or individual privileges.

   Note: Group privileges are only ***additive***, which means that if the group definition changes, user privileges are not automatically changed.

3. Select any applicable roles (for example, inspector, reviewer, or officer).

Available privileges

This section explains privileges that are available for user groups. For more information about groups, see Group Administration.

These privileges apply to users assigned the **USER** access level. Privileges in each area allow or prevent user access to modules and functions. Assign privileges to the group, and then assign users to the group. The areas are:

- System Wide
- Projects and Planning
- Permitting
- Code Compliance
- Entity Management
- CRM
- Land Management
- Licensing
- Report Module

System Wide

System Privilege Title	Description
CAN ADD NEW GIS	
CAN CHANGE NAME	Allows the user to change his or her own name in the User Information screen.
CAN CHANGE PASSWORD	Allows the user to change their own password in the User Information screen.
CAN DELETE GIS	
CAN EDIT AEC SETUP	Allows the user to add or edit entity (AEC) definitions.
CAN EDIT CASE TYPES	Allows the user to edit, add, delete, and view case types.
CAN EDIT CRM SETUP	Allows the user to add or edit CRM settings.
CAN EDIT DLI TABLES	Allows the user to edit DLI tables.

System Privilege Title	Description
CAN EDIT FEE SCHEDULE	Allows the user to create, modify, or delete Fee Schedule items in WUM.
CAN EDIT GENERIC1 TYPES	
CAN EDIT GENERIC2 TYPES	
CAN EDIT GENERIC3 TYPES	
CAN EDIT GENERIC4 TYPES	
CAN EDIT GENERIC5 TYPES	
CAN EDIT GEO SETUP	Allows the user to add or edit Land Management definitions.
CAN EDIT GIS	
CAN EDIT INSPECTION CONTROL	Allows the user to create, modify, or delete inspection types, inspector names, and standard inspection comments.
CAN EDIT KEYWORDS	Allows the user to add, edit, or delete keyword definitions.
CAN EDIT LICENSE TYPES	Allows the user to view, add, edit, or delete business license definitions.
CAN EDIT MAIN CONTROL	Allows the user to edit the system-wide main control table (located in the CentralSquare primary database).
CAN EDIT PAYMENT TYPES	Allows the user to add, edit, or delete payment type definitions.
CAN EDIT PERMIT TYPES	Allows the user to add, edit, or delete permit type definitions.
CAN EDIT PROJECT TYPES	Allows the user to add, edit, or delete project type definitions.
CAN EDIT REVIEW CONTROL	Allows the user to add, modify, or delete review types, reviewer names, and standard review comments.
CAN EDIT SYSTEM PREFERENCES	Allows the user to edit the system-wide preferences.

System Privilege Title	Description
CAN EDIT TIMETRAK TYPES	Allows the user to edit the Time Tracker types.
CAN EDIT USER NAMES	Allows the user to add, modify, or delete other user names.
CAN EDIT VALUATION SCHEDULE	Allows the user to add, modify, or delete valuation schedule items in WUM.
CAN IMPORT EXPORT	Allows the user to select the <Import/Export> function in WUM.
CAN OVERRIDE TRANSACTION STATUS	Allows the user to use the **Override Status** function in Community Development for payment transactions. This privilege applies only if you enabled the **Override Status** function for your agency by selecting the Enable Manual Override check box.
CAN POST ANY TRANSACTION	Allows the user to post transactions that were authorized by other users.
CAN UPDATE REPORTS	Allows the user to select the <Update Standard Reports> function in WUM.
CAN VIEW EMARKUPS	Allows the user to view eMarkups. DENY_VIEW_EMARKUPS cannot be selected.
CAN VIEW FEE HISTORY	Allows the user to view system-wide fee history.
CAN VIEW RECENT MODS	Allows the user to view the summary of recent modifications.
CAN VOID INVOICES	Allows the user to void invoices.
DENY VIEW EMARKUPS	Prevents the user from viewing eMarkups.
FULL ACCESS	Equivalent to granting the user all other rights except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, and CAN ATTACH & DELETE IMAGES. Allows the user to edit an attachment's file description and view other users' reserved time.
OVERRIDE INSPECTOR LOCK	Allows the user to edit inspector name.
OVERRIDE UDFNOTES LOCK	Allows the user to edit read-only UDF notes.

System Privilege Title	Description
WUM CAN EDIT FORMS AND REPORTS	Allows the user to edit settings in WUM **System Settings** > **Interfaces** > Forms and Reports.
WUM FULL ACCESS	Grants the user all other rights for accessing the system-wide functions in WUM.
WUM MODULE AEC	
WUM MODULE CASE	
WUM MODULE CRM	
WUM MODULE GENERIC1	
WUM MODULE GEO	
WUM MODULE LICENSE	
WUM MODULE PERMIT	
WUM MODULE PROJECT	
WUM MODULE WORKSPACE	
WUM SYSTEMSETTINGS ACCOUNTING	
WUM SYSTEMSETTINGS INSPECTIONS	
WUM SYSTEMSETTINGS INTERFACES	
WUM SYSTEMSETTINGS SYSTEMSETTINGS	
WUM SYSTEMSETTINGS TIMETRAK	
WUM USER PREFERENCES	Allows the user to edit group privileges in WUM.

Projects and Planning

Projects and Planning Privilege Title	Description
BOND FULL ACCESS	Grants the user all bond privileges.
CAN ADD	Allows the user to add records in this module.
CAN ADD BOND	
CAN ADD CHRONOLOGY	
CAN ADD FEE	
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD PROFFERS	This privilege is not available to all Community Development implementations.
CAN ADD REVIEWS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH PARENT PROJECT	User must have CAN ADD and CAN EDIT.
CAN DELETE BOND	
CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
CAN DELETE FEE	User must have CAN EDIT FEE and CAN EDIT.
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
CAN DELETE MULTICONDITIONS	User must have CAN EDIT MULTICONDITIONS.

Projects and Planning Privilege Title	Description
CAN DELETE PROFFERS	This privilege is not available to all Community Development implementations.
CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
CAN DISABLE NOTES DATESTAMP	
CAN DUPLICATE	
CAN EDIT	
CAN EDIT BOND	
CAN EDIT CHRONOLOGY	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY.
CAN EDIT FEE	
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have CAN EDIT MULTICONDITIONS.
CAN EDIT MULTICONDITIONS	
CAN EDIT PROFFERS	This privilege is not available to all Community Development implementations.
CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS.
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	

Projects and Planning Privilege Title	Description
CAN LINK GEO RECORDS	Allows the user to link project records to land records. The user does not need edit privileges in Land Management.
CAN OVERRIDE PREFIX	
CAN PAY BOND	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN REDUCE RELEASE BOND	User must have CAN EDIT BOND.
CAN REFUND FEE	Allows the user to use the **Refund** function. User must have CAN EDIT and CAN EDIT FEE privileges.
CAN UNPAY BOND	User must have CAN EDIT BOND privileges.
CAN VIEW BOND ATTACHMENTS	
CAN VOID TRANSACTION	Allows the user to use the **Void** function for payment transactions. The user must have this privilege for each module involved in the transaction. For example, if the transaction includes payments on a permit and a project, the user must have CAN VOID TRANSACTION in both Permitting and Projects and Planning.
DENY ACCESS	
DENY APPLY CREDIT	
DENY FEE OVERRIDE	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	

Permitting

Permitting Privilege Title	Description
BOND FULL ACCESS	Grants the user all bond privileges.
CAN ADD	Allows the user to add records in this module.
CAN ADD BOND	
CAN ADD CHRONOLOGY	
CAN ADD FEE	
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD REVIEWS	
CAN ADD VALUATION	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH ON LOCKED PERMITS	
CAN ATTACH PARENT PERMIT	User must have CAN EDIT PERMIT.
CAN ATTACH PARENT PROJECT	
CAN DELETE BOND	User must have PERMIT EDIT BOND and CAN EDIT FEE.
CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
CAN DELETE FEE	
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.

Permitting Privilege Title	Description
CAN DELETE MULTICONDITIONS	
CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
CAN DISABLE NOTES DATESTAMP	User must have FULL ACCESS.
CAN DUPLICATE	
CAN EDIT	
CAN EDIT BOND	
CAN EDIT CHRONOLOGY	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY.
CAN EDIT FEE	
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have CAN EDIT MULTICONDITIONS.
CAN EDIT MULTICONDITIONS	
CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS.
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	
CAN EDIT VALUATION	User must have CAN EDIT.
CAN LINK GEO RECORDS	Allows the user to link permit records to land records. The user does not need edit privileges in Land Management.

Permitting Privilege Title	Description
CAN OVERRIDE PREFIX	
CAN PAY BOND	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN REDUCE RELEASE BOND	
CAN REFUND FEE	Allows the user to use the Refund function. User must have CAN EDIT and CAN EDIT FEE privileges.
CAN UNPAY BOND	User must have CAN EDIT PERMIT and CAN EDIT BOND.
CAN VIEW BOND ATTACHMENTS	
CAN VOID TRANSACTION	Allows the user to use the **Void** function for payment transactions. The user must have this privilege for each module involved in the transaction. For example, if the transaction includes payments on a permit and a project, the user must have CAN VOID TRANSACTION in both Permitting and Projects and Planning.
DENY ACCESS	Prevents the user from accessing the Permitting module.
DENY APPLY CREDIT	
DENY FEE OVERRIDE	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	
OVERRIDE FIN EXP LOCK	Overrides the PERMITFINALED LOCK preference.

Code Compliance

Code Compliance Privilege Title	Description
CAN ADD	Allows the user to add records in this module.
CAN ADD CHRONOLOGY	
CAN ADD FEE	
CAN ADD INSPECTIONS	
CAN ADD MULTI VIOLATIONS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH PARENT PROJECT	
CAN DELETE CHRONOLOGY	
CAN DELETE FEE	User must have CAN EDIT CASE and CAN EDIT FEE.
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
CAN DISABLE NOTES DATESTAMP	
CAN DUPLICATE	
CAN EDIT	
CAN EDIT CHRONOLOGY	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY.
CAN EDIT CODE STATUS	
CAN EDIT FEE	

Code Compliance Privilege Title	Description
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTI VIOLATION NOTES	
CAN EDIT MULTI VIOLATIONS	
CAN EDIT TYPE SUBTYPE	
CAN LINK GEO RECORDS	Allows the user to link code compliance records to land records. The user does not need edit privileges in Land Management.
CAN OVERRIDE PREFIX	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN REFUND FEE	Allows the user to use the **Refund** function. User must have CAN EDIT and CAN EDIT FEE privileges.
CAN VIEW PROTECTED CONTACTS	
CAN VOID TRANSACTION	Allows the user to use the **Void** function for payment transactions. The user must have this privilege for each module involved in the transaction. For example, if the transaction includes payments on a permit and a project, the user must have CAN VOID TRANSACTION in both Permitting and Projects and Planning.
DENY ACCESS	Prevents the user from accessing the Code Compliancemodule.
DENY APPLY CREDIT	
DENY FEE OVERRIDE	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).

Code Compliance Privilege Title	Description
OVERRIDE DELETE ATTACHMENT LOCK	

Entity Management

Entity Management Privilege Title	Description
AEC DENY FINANCIAL PANE	Denies access to the **Financial Information** pane.
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN DELETE FEE	
CAN DISABLE NOTES DATESTAMP	
CAN EDIT	
CAN EDIT CHRONOLOGY NOTES	
CAN EDIT TYPE SUBTYPE	
CAN PAY FEE	User must have CAN EDIT.
CAN REFUND FEE	Allows the user to use the **Refund** function. User must have CAN EDIT and CAN EDIT FEE privileges.
CAN VOID TRANSACTION	Allows the user to use the **Void** function for payment transactions. The user must have this privilege for each module involved in the transaction. For example, if the transaction includes payments on a permit and a project, the user must have CAN VOID TRANSACTION in both Permitting and Projects and Planning.
DENY ACCESS	

Entity Management Privilege Title	Description
DENY APPLY CREDIT	
DENY HOLD NOTES	Prevents the user from viewing HOLD NOTES.
DENY VIEW FEINSSN	Prevents the user from viewing the value in the FEIN or SSN field in the Entity Management (AEC) module.
EDIT RESTRICTED MORE INFO	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	
RESTRICT VIEW ATTACHMENTS	Prevents the user from viewing ATTACHMENTS if the Restrict option is selected for a specific AEC type. For more information about the AEC restrict feature, see Record types.

CRM

CRM Privilege Title	Description
CAN ADD	Allows the user to add records in this module.
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN EDIT	
CAN EDIT CRM NOTES	
CAN EDIT TYPE SUBTYPE	
CAN LINK GEO RECORDS	Allows the user to link CRM records to land records. The user does not need edit privileges in Land Management.

CRM Privilege Title	Description
DENY ACCESS	Prevents the user from accessing the CRM module.
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	

Land Management

Land Management Privilege Title	Description
CAN ADD	Allows the user to add records in this module.
CAN ADD INSPECTIONS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN CREATE SC PROJECTS	
CAN DELETE INSPECTIONS	
CAN EDIT	
CAN EDIT CUSTOM SCREENS	User must have FULL ACCESS.
CAN EDIT INSPECTION NOTES	
CAN EDIT INSPECTIONS	
CAN EDIT MAINTENANCE LOG	

Land Management Privilege Title	Description
CAN EDIT RESTRICTION NOTES	User must have CAN EDIT RESTRICTIONS.
CAN EDIT RESTRICTIONS	User must have FULL ACCESS.
CAN EDIT SC PROJECTS	
CAN EDIT TYPE SUBTYPE	
CAN UNLOCK A LOCKED PARCEL	
DENY ACCESS	Prevents user from accessing Land Management.
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	

Licensing

Licensing Privilege Title	Description
CAN ADD	Allows the user to add records in this module.
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD REVIEWS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.

Licensing Privilege Title	Description
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
CAN DELETE MULTICONDITIONS	
CAN DELETE REVIEWS	
CAN DISABLE NOTES DATESTAMP	Allows the user to switch OFF automatic date/time stamping.
CAN EDIT	
CAN EDIT CHRONOLOGY NOTES	
CAN EDIT CONTACTS AND SITE INFO	
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have the CAN EDIT MULTICONDITION privilege.
CAN EDIT MULTICONDITIONS	
CAN EDIT REVIEW NOTES	
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	
CAN LINK GEO RECORDS	Allows the user to link license records to land records. The user does not need edit privileges in Land Management.
CAN PAY FEE	User must have CAN EDIT.

Licensing Privilege Title	Description
CAN PRINT RESTRICTED DOCUMENTS	
CAN PROCESS LOCKBOX	
CAN REFUND FEE	Allows the user to use the **Refund** function. User must have CAN EDIT and CAN EDIT FEE privileges.
CAN VIEW FEE HISTORY	Allows the user to view license fee history.
CAN VOID TRANSACTION	Allows the user to use the **Void** function for payment transactions. The user must have this privilege for each module involved in the transaction. For example, if the transaction includes payments on a permit and a project, the user must have CAN VOID TRANSACTION in both Permitting and Projects and Planning.
DENY ACCESS	Prevents the user from accessing the Licensing module.
DENY APPLY CREDIT	User must have CAN EDIT LICENSE.
DENY EDIT CONTACTS AND SITE INFO	
DENY FEE DETAILS	Denies access to viewing fee details in the Licensing module.
DENY FEE OVERRIDE	
DENY VIEW FEINSSN	Prevents the user from viewing the value in the FEIN or SSN field and other masked fields in the Licensing module.
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES).
OVERRIDE DELETE ATTACHMENT LOCK	

Report Module

Report Privilege Title	Description
CAN RUN RESTRICTED REPORTS	
DENY ACCESS	Prevents the user from accessing reports.

Merge Documents

Merge documents provide the ability to insert data from a Community Development record into a Microsoft Word document template. The following is an example of a merge document.

City of Pacific Shores
Department of Community Services
2525 Pacific Shores Blvd.
Pacific Shores, CA 90001

Phone: 888.222.5555
Fax: 888.222.5885

Code Compliance

VIA CERTIFIED MAIL RETURN RECEIPT REQUESTED

«CMD.TODAY»

«contacts.OWNER.Name»
«contacts.OWNER.Address1»
«contacts.OWNER.City», «contacts.OWNER.State» «contacts.OWNER.Zip»

RE: **«CaseNo», «SiteAddress»**

Dear: «contacts.OWNER.Name»

An inspection of your property located at was made on **«LastActionDate».**This inspection revealed a violation of the Pacific Shores City Code.

The **«UDF.YEAR», «UDF.COLOR» «UDF.MAKE» «UDF.MODEL»** must be removed from **«SiteAddress»** no later than **«FollowUpDate»**. Should you fail to clean up your property and bring it into compliance as required by law, a violation may be issued to you, which could result in a fine and/or costs being assessed against you. Please call the Department of Code Compliance at (858) 451-8680 if you have any questions.

Thank you for your prompt attention to this matter.

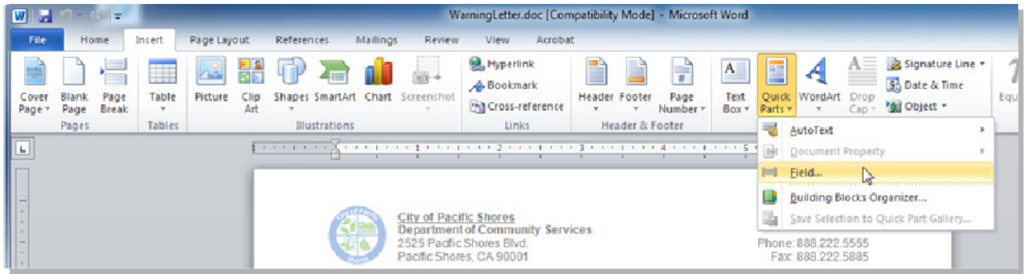
Very truly yours,

«AssignedTo»
Code Compliance Officer

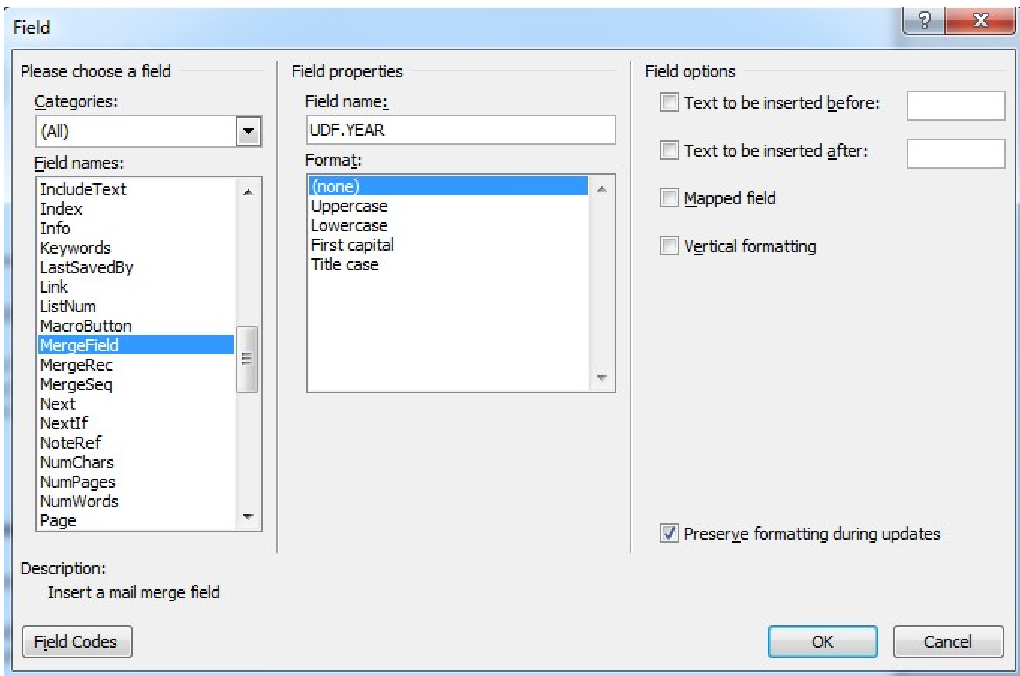
Adding a merge document

1. Open an existing or blank Microsoft Word document.
2. Insert merge fields into the document in the appropriate locations. To insert merge fields:

a. On the **Insert** ribbon select **Quick Parts** > **Field**.



b. Select **MergeField** from the **Field names** list.



c. Enter the Community Development merge document field name. For a complete list of Community Development names, see Merge document fields.

Important: Merge document fields are case sensitive. For example, to insert the Code Compliance case number, the merge field is **CaseNo**.

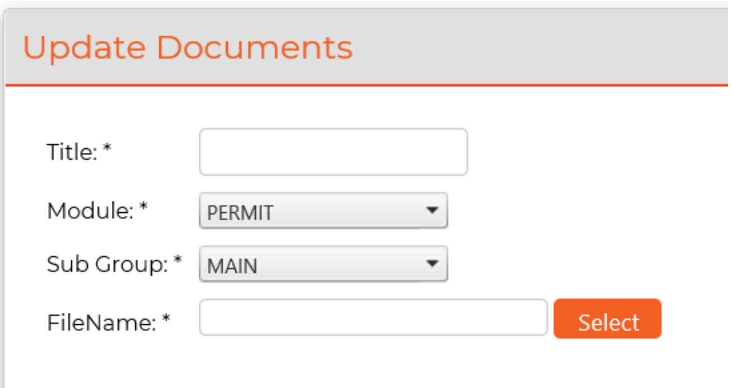
d. Select **OK.**

e. Repeat for each merged field.

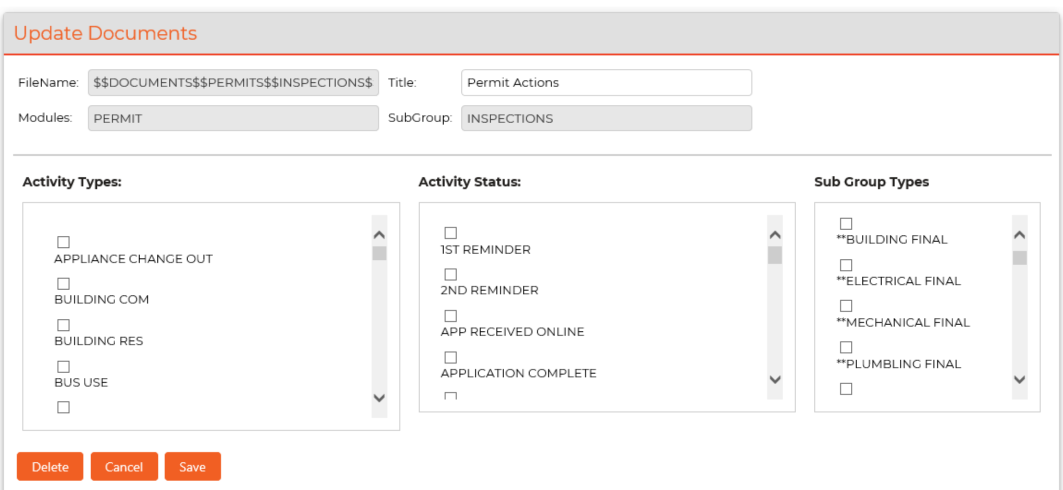
f. Save the document.

Adding a merge document to Community Development

1. In WUM, go to **System Settings** > **Interfaces** > **Forms And Reports**.
2. Select **Select**.



3. Go to the merge document and select **Open**.
4. Enter a title for the document. The user will see this title in Community Development.
5. Select the Community Development module.
6. Select an option in the **Sub Group** field. The default subgroup is main. This enables the user to generate the document from the Print function.
7. Select **Save & Next**.



8. Select options in the **Activity Types**, **Activity Status**, and **Sub Group Types** panes. If no activity types are selected, the document is available from all activity types.
9. Select **Save**.

Changing the properties of an existing merge document

1. In WUM, select **Merge Documents** from the left navigation pane.
2. Select the module name.
3. Select the document.
4. Update the properties as required.
5. Select **Save**.

Merge document fields

- Entity Management (AEC) merge document fields
- Code Compliance merge document fields
- Land Management merge document fields
- Licensing merge document fields
- Permitting merge document fields
- Projects and Planning merge document fields
- CRM merge document fields
- User-defined fields (UDF)
- Contacts
- Chronology
- Inspections
- Reviews
- Violations
- Conditions
- Restrictions
- Commands

Entity Management (AEC) merge document fields

ActivityNo	LicGrade2	SiteLotNo
Address1	LicGrade3	SiteNumber
Address2	LicGrade4	SiteState
AECSubType	LicGrade5	SiteStreetName
AECType	LicGrade6	SiteSubdivision
AppliedDate	LocationRecordID	SiteTract
BalanceDue	Notes	SiteUnitNo
City	OwnerName	SiteZip
Company	ParentAECStLicNo	State
Contact1	Password	Status
Contact2	PasswordChangeDate	StatusName
Contact3	Phone1	StLicExpire
CoOwnerName	Phone2	StLicIssue
DefaultPayer	Phone3	StLicNo
Email	PIN	SubTypeName
Fax	RecordID	TaxID
FeesCharged	SiteAddress	TrustAcctBalance
FeesPaid	SiteAlternateID	TrustAcctNo
Hold	SiteAPN	TypeName
HoldNotes	SiteBlock	WebSite
LicCategory1	SiteCity	Zip
LicCategory2	SiteDescription	
LicGrade1	SiteGeotype	

Code Compliance merge document fields

ActivityNo
AssignedTo
BalanceDue
CaseLocation
CaseName
CaseNo
CaseSubType
CaseType
ClosedBy
ClosedDate
CodeSection
ComplainantName
DefaultInspector
DefaultPayer
Description
FeesCharged
FeesPaid
FeesSelected
FollowUpBy
FollowUpDate
GroupImage
HasGeoRecordLock
HasGeoRestrictions
HistoricalAPN
HowReceived
LastActionBy
LastActionDate
LocationRecordID
LockID
MaskedSiteAPN
OtherBy1
OtherDate1
OwnerName
ParentLicenseNo
ParentPermitName
ParentPermitNo
ParentProjectName
ParentProjectNo
Prefix
RecordID
ReferredTo
ResidentName
Selected
SeqNo
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
StartedBy
StartedDate
Status
StatusName
SubTypeName
TypeName
YRMO

Land Management merge document fields

ActivityNo
BalanceDue
BldgData01
BldgData02
BldgData03
BldgData04
BldgData05
BldgData06
Census
Coord_X
Coord_Y
DefaultCaseInspector
DefaultCaseOfficer
DefaultInspector
DefaultLicenseInspector
DefaultPayer
DefaultPermit2Inspector
DefaultPermitInspector
DefaultProjectInspector
FeesCharged
FeesPaid
FeesSelected
GeneralPlan
GeoType
GroupImage
HistoricalAPN
ImprovedValue
IsChanged
LandUse01
LandUse02
LandUse03
LandUse04
LandUse05
LandUse06
LandValue
LegalDescription
LocationRecordID
Locked
LotSizeSF
MaskedSiteAPN
MultiAddress
NumberOfBathrooms
NumberOfBedrooms
NumberOfStories
NumberOfUnits
OwnerAddress1
OwnerAddress2
OwnerCell
OwnerCity
OwnerConfidentiality
OwnerCountry
OwnerEmail
OwnerFax
OwnerFirst
OwnerLast
OwnerName
OwnerPager
OwnerPhone
OwnerState
OwnerZip
ParentLocationRecordID
ParentSiteAddress
ParentSiteAPN
RecordID
RestrictionNotes
RestrictionOtherNotes
RestrictionType
SchoolDistrict
SectionTwpRng
Selected
SiteAddress
SiteAlternateID

SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStName
SiteStPrefix
SiteStreetID
SiteStreetName
SiteStSuffix
SiteStType
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
Status
StatusName
StructureSF
SubTypeName
TotalValue
TRA
TypeName
YearBuilt
ZoneCode1
ZoneCode2

Licensing merge document fields

ActivityNo
BalanceDue
CheckBox1
CheckBox2
CheckBox3
CheckBox4
CheckBox5
CheckBox6
CheckBox7
CheckBox8
Classification
Company
CompanyPrintAs
DefaultInspector
DefaultPayer
Email
EmergencyPhone
ExpiredBy
ExpiredDate
Fax
FeesCharged
FeesPaid
HasGeoRestrictions
HistoricalAPN
IssuedBy
IssuedDate
LiabilityCarrier
LiabilityExpiresDate
LiabilityIssuedDate
LiabilityNumber
LicenseNo
LicenseSubType
LicenseType
LocationRecordID
LockID
MailAddress1
MailAddress2
MailCity
MailState
MailZip
MainTextField1
MainTextField2
MainTextField3
MainTextField4
MainTextField5
MainTextField6
MainTextField7
MainTextField8

NumberOfEmployees
OwnerName
OwnershipType
ParentLicenseNo
ParentRecordID
Phone
Prefix
RecordID
ReferenceNo
ResaleID
Selected
SeqNo
SIC1
SIC2
SIC3
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStNo
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
StateLicenseExpiresDate
StateLicenseIssuedDate
StateLicenseNumber
Status
StatusBy
StatusName
SubTypeName
Tag
TaxID
TextField1
TextField2
TextField3
TextField4
TextField5
TextField6
TextField7
TextField8
TypeName

WorkersCompensation

WorkersCompensationExpiresDate

WorkersCompensationIssuedDate

WorkersCompensationNumber

YRMO

Permitting merge document fields

ActivityNo
ApplicantName
ApplicationNo
AppliedBy
AppliedDate
ApprovedBy
ApprovedDate
BalanceDue
Bldg2SF
BldgSF
Census
ConstType
ContractorName
DefaultInspector
DefaultPayer
Description
ExpiredBy
ExpiredDate
FeeAdjustments
FeesCharged
FeesPaid
FinaledBy
FinaledDate
FWDodge
Gar2SF
GarSF
GroupCode
HasGeoRestrictions
Height
HistoricalAPN
IssuedBy
IssuedDate
JobValue
LocationDesc
LocationRecordID
LotSF
MaskedSiteAPN
NoBldgs
NoStories
Notes
NoUnits
OccupancyType
OtherBy1
OtherDate1
OwnerName
ParentPermitName
ParentPermitNo
ParentProjectName
ParentProjectNo
PermitNo
PermitSubType
PermitType
PlanCheckNo
Porch2SF
PorchSF
Prefix
RecordID
ReferenceNo
School
SeqNo
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStNo
SiteStreetID

SiteStreetName	Status	ValidFor
SiteSubdivision	StatusName	YRMO
SiteTract	SubTypeName	ZoningCode1
SiteUnitNo	TaxRateArea	ZoningCode2
SiteZip	TypeName	

Projects and Planning merge document fields

ActivityNo	LandUse	SiteBlock
ApplicantName	LocationRecordID	SiteCity
AppliedBy	MaskedSiteAPN	SiteDescription
AppliedDate	OtherBy1	SiteGeotype
ApprovedBy	OtherDate1	SiteLotNo
ApprovedDate	OwnerName	SiteNumber
BalanceDue	ParentProjectName	SiteOwner
ClosedBy	ParentProjectNo	SiteState
ClosedDate	Planner	SiteStreetID
ContractorName	Prefix	SiteStreetName
DefaultInspector	PrimaryPin	SiteSubdivision
DefaultPayer	ProjectLoc	SiteTract
Description	ProjectName	SiteUnitNo
DeveloperName	ProjectNo	SiteZip
ExpiredBy	ProjectSubType	Status
ExpiredDate	ProjectType	StatusBy
FeesCharged	RecordID	StatusDate
FeesPaid	ResolutionNo	StatusName
FeesSelected	SeqNo	SubTypeName
GenPlan	SiteAddress	TypeName
HasGeoRestrictions	SiteAlternateID	YRMO
HistoricalAPN	SiteAPN	Zoning

CRM merge document fields

ActivityNo	FeesCharged	RecordID
AssignedUserID	FeesPaid	Resolution
BalanceDue	IssueAddress	SiteAPN
ComplainantAddress	IssueAlternateID	SiteAddress
ComplainantAlternanteID	IssueCity	SiteAlternateID
ComplainantCity	IssueEmail	SiteBlock
ComplainantEmail	IssueFax	SiteCity
ComplainantFax	IssueGeotype	SiteDescription
ComplainantGeotype	IssueID	SiteGeotype
ComplainantLocationRecordID	IssueLabel	SiteLotNo
ComplainantName	IssueLocationRecordID	SiteNumber
ComplainantPhone	IssueName	SiteState
ComplainantSiteAPN	IssuePhone	SiteStreetName
ComplainantState	IssuePhoneExt	SiteSubdivision
ComplainantZip	IssuePrefix	SiteTract
ComplainantDateString	IssueSiteAPN	SiteUnitNo
CreatedDateTimeString	IssueState	SiteZip
DefaultPayer	IssueSubtype	StatusName
DepositeType	IssueZip	SubTypeName
Description	LocationRecordID	Title
DueDateString	OwnerName	TypeName

User-defined fields (UDF)

Syntax: UDF.[field name]

Example: UDF.MODEL

For more information about creating user-defined fields, see Adding data fields.

Contacts

Syntax: CONTACTS.[property] - for any contact CONTACTS.[CONTACTTYPE].[property] - for a specific contact

Example: CONTACTS. OWNER.ActivityNo

CONTACTS.ActivityNo

CONTACTS.Address1

CONTACTS.Address2

CONTACTS.BusLicense

CONTACTS.Cell

CONTACTS.City

CONTACTS.Confidentiality

CONTACTS.CONTACTSummary

CONTACTS.Country

CONTACTS.Email

CONTACTS.Fax

CONTACTS.Geo_ActivityNo

CONTACTS.ID

CONTACTS.LocationRecordID

CONTACTS.Name

CONTACTS.NameType

CONTACTS.OtherName

CONTACTS.Pager

CONTACTS.Phone

CONTACTS.RecordID

CONTACTS.SiteAPN

CONTACTS.State

CONTACTS.Zip

Chronology

Syntax: ACTIONS.[property] - for any action ACTIONS.[ACTIONTYPE].[property] - for a specific action

Example: ACTIONS.EMAIL.ACTIONDate

ACTIONS.ACTIONBy

ACTIONS.ACTIONDate

ACTIONS.ACTIONDateString

ACTIONS.ACTIONDescription

ACTIONS.ACTIONType

ACTIONS.ActivityNo

ACTIONS.CompletedDate

ACTIONS.CompletedDateString

ACTIONS.IsVoided

ACTIONS.RecordID

ACTIONS.SiteAddress

Inspections

Syntax: INSPECTIONS.[property] - for any inspections INSPECTIONS.[INSPECTIONTYPE].[property] - for a specific inspection

Example: INSPECTIONS.R-FRAME.DefaultInspector

INSPECTIONS.ActivityNo

INSPECTIONS.City

INSPECTIONS.CompletedDate

INSPECTIONS.CompletedDateString

INSPECTIONS.CompletedTime

INSPECTIONS.CreatedBy

INSPECTIONS.CreatedDate

INSPECTIONS.CreatedTime

INSPECTIONS.DefaultInspector

INSPECTIONS.Duration

INSPECTIONS.DurationEst

INSPECTIONS.HasFeeBalance

INSPECTIONS.HasNotes

INSPECTIONS.INSPECTIONTrade

INSPECTIONS.INSPECTIONType

INSPECTIONS.Inspector

INSPECTIONS.InspectorName

INSPECTIONS.IsVoided

INSPECTIONS.Notes

INSPECTIONS.RecordID

INSPECTIONS.Remarks

INSPECTIONS.Result

INSPECTIONS.ScheduledDate

INSPECTIONS.ScheduledDateString

INSPECTIONS.ScheduledTime

INSPECTIONS.SEQID

INSPECTIONS.SiteAddress

INSPECTIONS.SiteStreetNameNumber

Reviews

Syntax: REVIEWS.[property] - for any review REVIEWS.[REVIEWTYPE].[property] - for a specific review

Example: REVIEWS.BUILDING.ContactName

REVIEWS.ActivityNo

REVIEWS.Contact

REVIEWS.ContactID

REVIEWS.ContactName

REVIEWS.DueDate

REVIEWS.DueDateString

REVIEWS.IsVoided

REVIEWS.Notes

REVIEWS.ParentDescription

REVIEWS.ReceivedDate

REVIEWS.ReceivedDateString

REVIEWS.RecordID

REVIEWS.Remarks

REVIEWS.REVIEWType

REVIEWS.SentDate

REVIEWS.SentDateString

REVIEWS.Status

Violations

Syntax: VIOLATIONS.[property] - for any violation VIOLATIONS.[VIOLATIONTYPE].[property] - for a specific violation

Example: VIOLATIONS.USE PERMIT VIOLATION.ViolationNotes

VIOLATIONS.CaseNo

VIOLATIONS.RecordID

VIOLATIONS.Notes

VIOLATIONS.ViolationType

Conditions

Syntax: CONDITIONS.[property] - for any condition CONDITIONS.[CONDITIONTYPE].[property] - for a specific condition

Example: CONDITIONS.LANDSCAPING.DateRequired

CONDITIONS.ActivityNo

CONDITIONS.Notes

CONDITIONS.ConditionLocation

CONDITIONS.ConditionType

CONDITIONS.Contact

CONDITIONS.DateAdded

CONDITIONS.DateAddedString

CONDITIONS.DateRequired

CONDITIONS.DateRequiredString

CONDITIONS.DateSatisfied

CONDITIONS.DateSatisfiedString

CONDITIONS.Department

CONDITIONS.IsVoided

CONDITIONS.RecordID

CONDITIONS.Remarks

CONDITIONS.Seq_No

CONDITIONS.Status

CONDITIONS.UserID

Restrictions

Syntax: RESTRICTIONS.[property] - for any restriction RESTRICTIONS.[RESTRICTIONTYPE].[property] - for a specific restriction

--Restriction types are HOLD, NONE, and WARNING

Example: RESTRICTIONS.NONE.DateAdded

RESTRICTIONS.ActivityNo

RESTRICTIONS.DateAdded

RESTRICTIONS.DateAddedString

RESTRICTIONS.DateCleared

RESTRICTIONS.DateClearedString

RESTRICTIONS.LocationRecordID

RESTRICTIONS.RecordID

RESTRICTIONS.RESTRICTIONNotes

RESTRICTIONS.RESTRICTIONOtherNotes

RESTRICTIONS.RestrictionType

RESTRICTIONS.SiteAPN

RESTRICTIONS.UserAdded

RESTRICTIONS.UserCleared

Commands

Syntax: CMD.[COMMANDNAME]

Example: CMD.TODAY

TODAY: Todays Date

DATE1: 1 day from today

DATE7: 7 days from today

DATE10: 10 days from today

DATE15: 15 days from today

DATE30: 30 days from today

DATE60: 60 days from today

DATE90: 90 days from today

USER: User name

USERID: User ID

TIMESTAMP: Timestamp

CRM email templates

Module Configuration > CRM > Keywords

Lists the available CRM fields and their associated keywords.

To add a CRM email template, complete the procedure in Adding an email template.