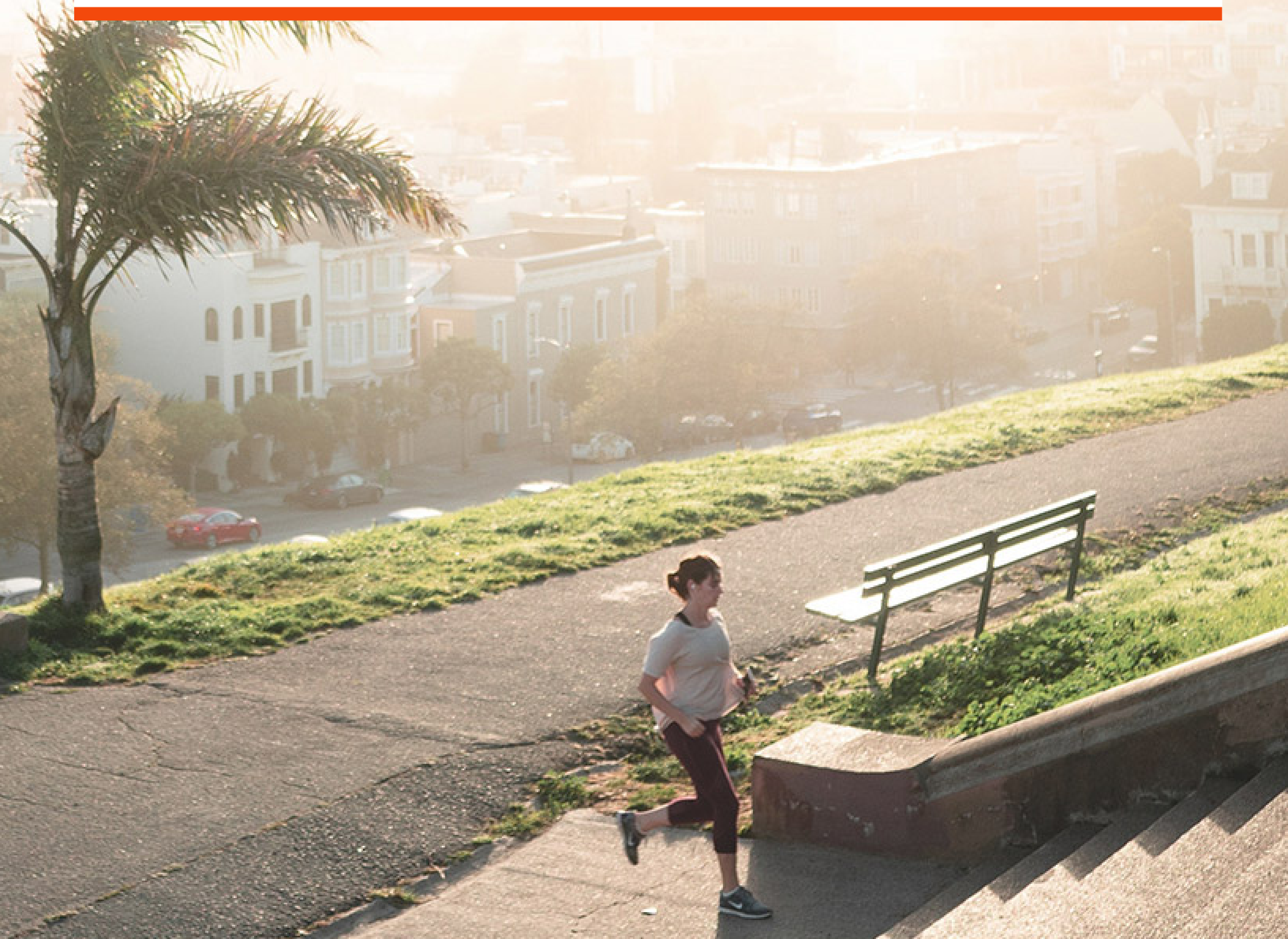
CENTRALSQUARE

eTRAKiT Administrator

24.1.2 AWS



Contact us

CentralSquare Technologies
1000 Business Center Drive
Lake Mary, Florida 32746
centralsquare.com

Customer portal and support

support.centralsquare.com • 833-278-7877 (833-CST-SUPP)

Education and training

csu@centralsquare.com • (800) 727-8088 • catalog.centralsquare.com • csu.litmos.com

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About eTRAKiT

eTRAKiT is a public online portal that interfaces with your internal Community Development application to provide the public with easily accessible information related to permits, projects, licenses, code compliance, land, and inspections. With eTRAKiT, both agencies and citizens can securely access and submit information using an internet browser.

The design, content, and accessibility of your eTRAKiT website are defined by a system administrator using the eTRAKiT Administrator application and settings in Community Development Web Utilities & Maintenance (WUM).

Customer support

For support questions or issues, contact the Community Development support team at 833-278-7877 (833-CST-SUPP) or go to support.centralsquare.com.

Getting started

Before you can log in to eTRAKiT Administrator, CentralSquare must provide access to eTRAKiT Administrator for your user account. Access to eTRAKiT Administrator requires ADMIN-level access in Community Development. Each agency has only one eTRAKiT administrator account. Typically, this account is set up during installation.

When you have access, complete the following steps to log in to eTRAKiT Administrator:

1. Open eTRAKiT Administrator using one of the following methods:
   - In the Public Administration Suite Pro Workspace, select the eTRAKiT Administrator link. The eTRAKiT Administrator login page appears.
   - In your browser, go to your eTRAKiT Administrator URL. The Public Administration Suite Pro login page appears. Enter your user name and password. The eTRAKiT Administrator login page appears.
2. Enter your eTRAKiT Administrator user name and password, and then select **Login**.

   Note: Your eTRAKiT Administrator user name and password might be different than your Public Administration Suite Pro user name and password.

Tip: Although login and password information is stored in the eTRAKiT web.config file, all user names and passwords must also be defined in your Community Development system.

eTRAKiT Administrator preferences

Admin Home

Modules/Features

Use this tab to enable certain online features. All possible features are shown below, but options can vary depending on your licensing key.

To enable online features, select the corresponding option. Options include:

- **Permit Search**, **Project Search**, **Contractor Search**, **Parcel Search**, **License Search**, **CRM Search**, and **Violation Search**: Select these options to enable online users to search specific modules. Select the link beside each search option to configure the search formats for that module. For more information about search format options, see Configuring search formats.
- **Renew License** and **Renew AEC**: Select these options to enable users to renew a business or AEC license.
- **Submit CRM Issue**: Select this option to enable online users to submit a CRM issue.
- **Inspections**: Select this option to enable online users to schedule an inspection.

To disable online features, complete the following steps:

1. Clear the corresponding option.
2. Clear the corresponding option on the **Applications/Online Payments** tab (Permit, Project, License, and AEC only).
3. Select **Save & Logout** to save your selections.

Tip: Website preferences can be configured only for features that are already enabled.

Configuring search formats

After selecting the option to enable the search feature for a module, select the link beside the option. A field format page appears. Use this page to select and format fields that each type of user can use to search.

- **Etrakit System Users**: Select the type of user for which you want to configure the search.
- **Select Fields to Display**: Select the fields that you want to be available for the selected user in the **Search By** field on your eTRAKiT website. The selected fields show in the table in the **Customize Display** area.
- **Display Custom Screens in Search Results**: Select this check box if you want custom screens that you set up in Community Development Web Utilities & Maintenance (WUM) to appear on the **Search Results** page on your eTRAKiT website.

- **Customize Display**: Use this area to customize how the search fields appear in the **Search By** field and search results headers on your eTRAKiT website. By default, the display name is the same as the database field name. You can make the following customizations:
  - To edit the display name, select . Type the display name and then select to save your changes. If you want to exit the edit function without saving changes, select .
  - To change the order of the fields, select the row you want to move by selecting . Then select the **Up** or **Down** button to move the field.
- **Default Search Field**: Select the field that will appear as the default search field for the selected user. The options are the fields you selected to appear in the **Search By** field.
- **Default Operator**: Select the operation that will appear as the default search operation for the selected user.

After you make your changes for a user type, select **Save**. Then, select **Save & Logout** to see search changes immediately on your eTRAKiT website.

Applications/Online Payments

Use this tab to set up online payments and third-party payment processor information.

Note: Work with the Community Development support team and your payment processor to ensure that your payment integration is configured properly.

Admin Login

- **Username**: User name of the eTRAKiT administrator account.
- **Forgot Password**: If you want to reset the password for your eTRAKiT administrator account, select this button.

Applications

- **Purge Carts Before Today**: Select this button to remove items in inactive shopping carts for all users.
- **Purge Shopping Carts After**: Select a number of days that items remain in a user's inactive shopping cart. Shopping cart items are removed after this number of days.
- **Show Shopping Cart**: Select this check box to allow users to pay for fees and other items from your eTRAKiT public website. Clear this check box if you do not want to accept payments on your eTRAKiT public website.

Tip: For more information about setting up eTRAKiT to accept online payments, see Enabling online payments (page 4).

- **Permit Application**: Select this check box to allow users to pay for permit applications from your eTRAKiT public website. Clear this check box if you do not want to accept permit application payments on your eTRAKiT public website.
- **Project Application**: Select this check box to allow users to pay for project applications from your eTRAKiT public website. Clear this check box if you do not want to accept project application payments on your eTRAKiT public website.
- **License Application**: Select this check box to allow users to pay for license applications from your eTRAKiT public website. Clear this check box if you do not want to accept license application payments on your eTRAKiT public website.
- **AEC Application**: Select this check box to allow users to pay for AEC applications from your eTRAKiT public website. Clear this check box if you do not want to accept AEC application payments on your eTRAKiT public website.

Enabling online payments

To enable online payments, contact CentralSquare for help setting up eTRAKiT to work with your payment processor. The following procedure outlines the basic steps for setting up payments but is not all inclusive.

1. In the **Applications** pane, select the **Show Shopping Cart** check box.

   Note: To allow online applications, select **Permit Application**, **Project Application**, **License Application**, and **AEC Application**.

2. Select **Save & Logout** to permanently save any changes to your eTRAKiT preferences.

Getting started questions

How do I configure a contractor-only login?

These settings limit searches, payments, attachments, and inspections to contractor access.

1. Go to **Permitting** > **General**.
2. In the **Login** pane, set the **Required** field to **False** to allow searches without logging in. Set the **Security** field to **Require Contractor Login**.
3. In the **Attachments** pane, set the **Upload** field to **True** to enable contractors to upload attachments. Set the **Security** field to **Require Contractor Login**.
4. In the **Payment** pane, set the **Online** field to **True** to enable online payments for contractors. Set the **Security** field to **Require Contractor Login**.
5. Select **Save**.
6. Go to **Permitting** > **Inspections**.
7. In the **Login** pane, set the **Security** field to **Require Contractor Login**.

8. Select **Save**.
9. Go to **Projects and Planning** > **General**.
10. In the **Login** pane, set the **Required** field to **False** to allow searches without logging in. Set the **Security** field to **Require Contractor Login**.
11. In the **Attachments** pane, set the **Upload** field to **True** to enable contractors to upload attachments. Set the **Security** field to **Require Contractor Login**.
12. In the **Payment** pane, set the **Online** field to **True** to enable online payments for contractors. Set the **Security** field to **Require Contractor Login**.
13. Select **Save**.
14. In the Licensing, Entity Management, Land Management, and Code Compliance modules, complete the following fields as in previous steps:
    - **Login** pane—**Required**, **Security**
    - **Attachments** pane—**Upload**, **Security**
    - **Payment** pane—**Online**, **Security**

    Select **Save** in each module before moving to the next module.

How do I remove the login requirement for searches?

These settings remove the login requirements for all user searches.

1. Go to **Permitting** > **General**.
2. In the **Login** pane, set the **Required** field to **False**.
3. In the **Attachments** pane, set the **Upload** field to **False**.
4. In the **Payment** pane, set the **Online** field to **False**.
5. Select **Save**.
6. Go to **Admin Home** > **Applications/Online Payments**.
7. Clear the **Show Shopping Cart** check box.
8. Select **Save**.
9. Go to **Projects and Planning** > **General**.
10. In the **Login** pane, set the **Required** field to **False**.
11. In the **Payment** pane, set the **Online** field to **False**.
12. In the **Attachments** pane, set the **Upload** field to **False**.
13. Select **Save**.
14. In the Licensing, Entity Management, Land Management, and Code Compliance modules, complete the following fields as in previous steps:

- **Login** pane—Set the **Required** field to **False**.
- **Attachments** pane—set the **Upload** field to **False**.
- **Payment** pane—**Online**

Select **Save** in each module before moving to the next module.

How do I help users with forgotten passwords?

Some notes about passwords:

- Passwords for registered public users and contractors must have a minimum of 12 characters.
- The **Login Attempts** option in **General** > **General** preferences specifies the number of failed login attempts you allow before the user account is locked.
- Users cannot use commonly used passwords (for example, *Password123!*) or passwords previously exposed in a data breach. When users create an account or change their password, eTRAKiT checks passwords against a database of common and exposed passwords. If the user's password is found, eTRAKiT displays a message showing password requirements. After clearing the message, the user must enter a different password.

The following settings help users by sending login information to their verified email address.

1. Go to **General** > **Agency Info**.
2. In the **Email** field, enter the email address for the agency contact.
3. Select **Save**.
4. Go to **General** > **Email**.
5. Enter the server name in the field provided.
6. Select **Save**.
7. Go to **General** > **Public Login** > **Security**.
8. Set the **Password Help** field to **Forgot Password**.
9. Enter the password email subject text.
10. Enter the password email body text.
11. Select **Save**.
12. Go to **General** > **Contractor Login** > **Security**.
13. Set the **Password Help** field to **Forgot Password**.
14. Enter the password email subject text.
15. Enter the password email body text.
16. Select **Save**.
17. Verify the changes by entering your user name in eTRAKiT and selecting **Forgot Password**.

How do I customize our eTRAKiT website with a banner?

1. Create a Photoshop image of the agency banner with the following specifications:
   - Image size: 950 pixels wide by 92 pixels high
   - Background: either transparent or background matching one of the three color themes
   - File format: Save the image as a PNG file named banner.png
2. Copy banner.png to the location that corresponds to the theme you are using:
   - C:*install folder*\ETRAKiT3\App_Themes\Autumn\im
   - C:*install folder*\ETRAKiT3\App_Themes\Custom\im
   - C:*install folder*\ETRAKiT3\App_Themes\Trakit\im
3. Log in to eTRAKiT Administrator.
4. Go to **General** > **General**.
5. From the **Theme** field, select the setting that corresponds to where your banner was copied.
6. Select **Save**.

How do I customize my agency's permit forms with a logo?

1. Verify the logo image size does not exceed 139 pixels wide by 149 pixels high.
2. Copy the file to the following location: C:*install folder*\ETRAKiT3\App_Themes\ Custom\im.
3. Log in to eTRAKiT Administrator.
4. Go to **General** > **General** tab.
5. Enter the path and filename (including file extension) in the **Agency Logo** field.
6. Select **Save**.
7. Verify by logging in to eTRAKiT and printing a permit.

General preferences

General

Use this tab to configure the appearance of your agency's eTRAKiT public website.

Site

- **Theme**: Select from three available default color themes: **Autumn**, **TRAKiT**, or **Custom**. Select **Save** immediately after changing your selection for this field to ensure applicable options appear.

  If you select **Custom** and then select **Save**, the Custom Theme Editor icon appears. This icon enables you to open the custom theme editor.

If you select **Custom**, the **eTRAKiT URL** field is required.

For detailed information about the eTRAKiT Custom Theme Editor, refer to Custom Theme Editor (page 66).

- **Errors**: Select **Friendly Details** to provide information for site errors.
- **Hide Map**: Select **True** or **False** to turn maps off or on, respectively, for all modules.
- **Agency Logo**: Type the path to your agency's logo image file. The logo will appear at the top of printable permit documents.
- **Contact Page**: Type the path to your agency's contact information page.
- **APN Link**: Type the URL to your GIS or Land Management data. Site APN (Access Point Name) gateway numbers appear as URL hyperlinks. Use the tag "{SITE_APN}" for the site APN value.
- **eTRAKiT URL**: Enter the URL of your eTRAKiT website. This field is required if the **Theme** field is **Custom**.
- **Hide Footer**: Select **False** to display the default CentralSquare footer. Select **True** to hide the default CentralSquare footer.
- **Site Key**: Type the reCAPTCHA site key information string. This field is masked (characters appear as dots) for security reasons.
- **Secret Key**: Type the reCAPTCHA secret key information string. This field is masked (characters appear as dots) for security reasons.
- **Login Attempts**: Select the number of failed login attempts allowed before the user account is locked.
- **Reset Account**: Select **True** to allow users to reset their locked accounts.
- **Email URL**: Enter the URL link for users to select to reset their passwords.
- **Admin Email URL**: Enter the URL link for an administrator to select to reset user passwords.

> **Tip:** For the Land Management module: "Search.aspx?grp=parcel&activityNo={SITE_APN={SITE_APN}}"

- **Header**: Enter additional home page text and style.
- **Sub-Header**: Enter additional subheader text and style.
- **Footer**: Edit the page footer text and style.

Attachments

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Types**: Choose the specific extension types to allow as uploaded attachments.
- **Uploaded Path**: If a path is entered, attachments are uploaded to a temporary folder to be scanned for viruses. Most users leave this field blank to use the default application path from the web.config file.
- **Disclaimer**: Enter disclaimer text that will appear for verification when a user uploads an attachment.

Fee Estimator

- **Enable**: Select **True** to allow the user to add multiple fee estimates from multiple application types to a single fee summary. If a feature is enabled, the user starts the process at the **Fee Estimate Summary** page.
- **Require Login**: Select **True** to require a user login to use the multiple fees estimator.
- **Permit Fees**: Select **True** to allow specific fees on a permit estimate.
- **Project Fees**: Select **True** to allow specific fees on a project estimate.
- **Display Disclaimer**: Enter text for a custom multiple fees estimator disclaimer message.
- **Email Disclaimer**: Enter text for a custom email about the multiple fees estimator disclaimer.

User Disclaimers

- **Forgot Password**: Enter the password disclaimer that you want to appear for forgotten passwords when the Forgot Password functionality is enabled for public users and contractors.
- **User Profile**: Enter the disclaimer that you want to appear on the user profile page.
- **Inspections**: Enter disclaimer text for verification of requested and scheduled inspections.

Agency Info

This tab is used to record your agency's city name, address, email address, and phone information.

- **Agency Name**: Enter the name of the agency.
- **Address**: Enter the address of the agency.
- **County**: Enter the agency county.
- **State**: Enter the agency state.
- **Zip**: Enter the agency ZIP Code.
- **Email**: Enter the email address for the agency.
- **Phone**: Enter a phone number for the agency.
- **Footer**: Enter the agency footer text.

Email

Use this tab to record your site email server IP or DNS name and email server port information.

- **Server Name**: Enter the IP address for your email server.
- **Server Port**: Enter the port number for the email server.

Public Login

This tab is used to configure preferences for public accounts on your eTRAKiT public website.

Login

- **Users**: Select **View List** to view the list of online users.
- **Default**: Select **True** to default the login type to public registered users.
- **Display**: Select **True** or **False** to turn the login display on or off, respectively.

> **Note:** If the **Display** field is **False** and the permit or project preference for **Require Login** is set to **Either** or **Self Registered**, the public login appears. **Require Login** must be set to **Contractor** *and* **Display** must be set to **False** to hide the public login option.

- **License/ID**: Select **True** to validate the contractor in AEC when the Contractor box is checked in a permit application.
- **Fields**: Select the input fields to appear when a public user registers.
- **Login**: Enter the text to appear for a public user account.
- **Password**: Enter text to appear for the public user password.
- **Verification**: This enables the Public Registered Multi-Step Verification within eTRAKiT. Options are **Enabled** and **Disabled**. If verification is disabled, users are logged in without verification.
- **Required**: Choose fields that are required for public registration. The same public registration fields must be selected in **Fields** before choosing which are required to create an account.
- **Header**: Enter the message to appear for the public users who want to register.
- **Login Header**: Enter and format text to appear on the web page above the login.
- **Login Footer**: Enter and format text to appear on the web page below the login.

Security

General

- **Password Help**: Select the way you want the site to provide user password help. The options are:

  - **None**: Public users cannot reset their password on your eTRAKiT public website. They must call your agency or go into the agency office.
  - **Forgot Password**: Show a **Forgot Password** link on your eTRAKiT public website. Public users who forget their password can select the link and complete verification fields to receive a password reset email.
- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Account Created**: Enter the message that appears when a citizen successfully creates an account.
- **Change SQA Subject**: Enter the subject text for the confirmation email sent to users after they change their security question or answer.
- **Change SQA Body**: Enter body text for the confirmation email sent to users after they change their security question or answer.
- **Require Login Change**: Enter text you want to display when a user login change is required.

Forgot PW Link

- **Disclaimer**: Enter the disclaimer message you want to show on the web page when a user selects the **Forgot Password** link.
- **Confirmation**: Enter the confirmation message you want to show on the web page when a user successfully completes fields on the **Forgot Password** page and then selects the **Reset Password** button.

Forgot Username

- **Username Link**: Select **True** to display a **Forgot username** link on your eTRAKiT public website. Public users who forget their user name can select the link and complete verification fields to receive their user name via email. Select **False** if you do not want to use the Forgot Username feature for public logins.

  Notes:

  - If either this field or the **Username** Link field on the **Contractor Login** tab is **True**, the **Forgot username** link appears on your eTRAKiT public website.
  - If both **Username Link** fields are **True**, after selecting the **Forgot username** link, the user must choose whether the account is for a public registered user or a contractor.
  - If both **Username Link** fields are **False**, the **Forgot username** link does not appear on your eTRAKiT public website.
- **Email Subject**: This field applies only if the **Username Link** field is **True**. Enter text for the subject of the email that is sent to users who select the **Forgot username** link. If you leave this field blank, default subject text is used.

- **Email Body**: This field applies only if the **Username Link** field is **True**. Enter text for the body of the email that is sent to users who select the **Forgot username** link. If you leave this field blank, default body text is used.

Reset PW Link

- **Email Subject**: Enter the text for the subject line of the email that is sent to users when they forget their passwords.
- **Email Body**: Enter the text for the body of the email that is sent to users when they forget their passwords.

Reset Response

- **Disclaimer**: Enter the disclaimer message you want to show on the web page when a user selects the **Reset Password** button.
- **Confirmation**: Enter the confirmation message you want to show on the web page when users successfully reset their password.
- **Confirmation Subject**: Enter text for the subject of the email that is sent to users who successfully reset their password.
- **Confirmation Body**: Enter text for the body of the email that is sent to users who successfully reset their password.

Contractor Login

This tab is used to configure preferences for contractor accounts on your eTRAKiT public website.

Login

- **Users**: Select **View List** to view the list of online contractor users. From the list, you can search for contractors and edit contractor information.
- **Default**: Select **True** to default the displayed login to contractors.
- **Display**: Select **True** or **False** to turn the login list on or off, respectively.
- **Login**: Type text for the contractor login field at the top.
- **Login Label**: Type text for the contractor login field on the login page.
- **Password Label**: Enter the text for the label of the contractor password field.
- **AEC No. Label**: Type the label for the AEC (Architects, Engineers, Contractors) license number field.
- **Dropdown**: Select **True** to display a drop-down list of contractor names or **False** to allow contractor login using a state license number.

- **Dropdown Filter**: Exclude specific contractors from online access by entering a custom filter for their PIN numbers. The default filter is `isnull(password, '') <> ''`.

  For more information, refer to How do I enable contractor web access? (page 81)
- **Force Password**: Select **True** to prompt new contractors to create their own password the first time they log in to your eTRAKiT public website.
- **Fields**: Select input fields that appear when a contractor registers. Options include address, email, and phone number.
- **Required**: Select the fields that you want to require for contractor registration. Fields you want to require must also be selected in **Fields**.
- **Login Header**: Type header text for the login page.
- **Login Footer**: Type footer text for the login page.

Custom

- **Email By Result**: Select **True** to automatically email contractors according to result status.

Validation

- **Login**: Select **True** to enable validation of the contractors upon login.
- **Types**: Select input fields that are required for contractor validation.
- **WC Label**: Type the message you want to appear upon worker's compensation verification.
- **Valid License Status**: If you enabled contractor validation and selected **Status** as validation criteria, enter the status that indicates a valid contractor.
- **Status Message**: Enter the text you want to appear when the license is not valid.
- **License Expiration**: Enter the text you want to appear when the license is expired.
- **WC Expiration**: Enter the text you want to appear if the contractor's worker's compensation insurance expired.
- **Liability Expiration**: Enter the text you want to appear if the contractor's liability insurance expired.

Security

General

- **Password Help**: Select the way you want the site to provide password help for contractors. The options are:
  - **None**: Contractors cannot reset their password on the eTRAKiT public website. They must call your agency or go into the agency office.
  - **Forgot Password**: Show a **Forgot Password** link on your eTRAKiT public website. Contractors who forget their password can select the link and complete verification fields to receive a password reset email.
- **Forgot Password**: Select the field to use to verify the user's identity after a contractor selects the **Forgot Password** link.
- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Change SQA Subject**: Enter the subject text for the confirmation email sent to users after they change their security question or answer.
- **Hide Trust Account**: Select **True** to suppress the display of trust accounts.

  Tip: Trust accounts are deposited funds that are held by the agency on behalf of someone doing business with the agency (for example, a contractor). The contractor can draw on these funds to pay fees.

- **Change SQA Body**: Enter body text for the confirmation email sent to users after they change their security question or answer.
- **Require Login Change**: Enter text you want to display when a user login change is required.

Forgot Password Link

- **Disclaimer**: Enter the disclaimer message you want to show on the web page when a contractor selects the **Forgot Password** link.
- **Confirmation**: Enter the confirmation message you want to show on the web page when a contractor successfully completes fields on the **Forgot Password** page and then selects the **Reset Password** button.

Forgot Username

- **Username Link**: Select **True** to display a **Forgot username** link on your eTRAKiT public website. Contractors who forget their user name can select the link and complete verification fields to receive their user name via email. Select **False** if you do not want to use the Forgot Username feature for public logins.

Notes:

- If either this field or the **Username** Link field on the **Public Login** tab is **True**, the **Forgot username** link appears on your eTRAKiT public website.
- If both **Username Link** fields are **True**, after selecting the **Forgot username** link, the user must choose whether the account is for a public registered user or a contractor.
- If both **Username Link** fields are **False**, the **Forgot username** link does not appear on your eTRAKiT public website.

- **Email Subject**: This field applies only if the **Username Link** field is **True**. Enter text for the subject of the email that is sent to contractors who select the **Forgot username** link. If you leave this field blank, default subject text is used.
- **Email Body**: This field applies only if the **Username Link** field is **True**. Enter text for the body of the email that is sent to contractors who select the **Forgot username** link. If you leave this field blank, default body text is used.

Reset Password Link

- **Email Subject**: Enter text for the subject of the email that is sent to users who select the **Reset Password** button.
- **Email Body**: Enter text for the body of the email that is sent to users who select the **Reset Password** button.

Reset Response

- **Disclaimer**: Enter the disclaimer message you want to show on the web page when a user selects the **Reset Password** button.
- **Confirmation**: Enter the confirmation message you want to show on the web page when users successfully reset their password.
- **Confirmation Subject**: Enter text for the subject of the email that is sent to users who successfully reset their password.
- **Confirmation Body**: Enter text for the body of the email that is sent to users who successfully reset their password.

Registration

- **CSLB Verification**: Select **Enabled** to activate contractor verification so that when contractors register in eTRAKiT, they are automatically added to AEC. The **CSLB Verification** option is valid in California only.
- **New CSLB Link**: Enter the URL for the Contractors State License Board (CSLB) registration activation link.

- **Validate CSLB**: Select **True** or **False** to indicate whether eTRAKiT checks if contractors are registered with the Contractors State License Board (CSLB) when they register for an eTRAKiT account.

  If you select **False**, eTRAKiT does not validate contractor license numbers entered during the registration process against the CSLB database.

  If you select **True**, eTRAKiT checks contractor license numbers entered during the registration process against the CSLB database. Your selection for the **Allow Invalid CSLB Registration** option determines whether contractors who are not registered with CSLB can register for an eTRAKiT account.
- **Check CSLB and Update AEC on Login**: Select **True** or **False** to indicate whether to update a contractor's Entity Management record in Community Development with information received from CSLB when the contractor logs in to eTRAKiT. To update Entity Management records, select **True**. If you do not want to update Entity Management records with information from CSLB, select **False**.
- **AEC Type**: Select the AEC (Architects, Engineers, Contractors) type. If multistep verification is enabled, all contractors registering in eTRAKiT are automatically set as the selected AEC type.

  Tip: For more details about enabling multistep verification, refer to How do I set up multistep verification? (page 77).
- **AEC Subtype**: Select the AEC subtype. If multistep verification is enabled, all contractors registering in eTRAKiT are automatically set as the selected AEC subtype.
- **Allow Non-CSLB Registration**: Select **True** or **False** to indicate whether contractors must be registered with the Contractors State License Board (CSLB) to register for an eTRAKiT account.

  Select **False** to require that contractors are registered with CSLB to register for an eTRAKiT account. (You do not allow invalid CSLB license numbers.)

  Select **True** to allow contractors to register for an eTRAKiT account regardless of whether they are registered with CSLB. (You allow invalid CSLB license numbers.)

Examples: A contractor who is not registered with CSLB tries to register for an eTRAKiT account.

- If **Validate CSLB** is **False**, the contractor can register regardless of the value in **Allow Invalid CSLB Registration**. No validation occurs against the CSLB database.
- If **Validate CSLB** is **True** and **Allow Invalid CSLB Registration** is **True**, the contractor can register for an eTRAKiT account. eTRAKiT checks whether contractors are registered with CSLB but does not require CSLB registration.
- If **Validate CSLB** is **True** and **Allow Invalid CSLB Registration** is **False**, the contractor cannot register for an eTRAKiT account. eTRAKiT checks whether contractors are registered with CSLB and requires CSLB registration.

- **CSLB Header**: Enter the text that appears as the header on the CSLB registration page.
- **New CSLB Message**: Enter the text that appears on the web page after the contractor applies for an account.
- **New CSLB Email**: Enter the text for the email sent to the contractors who apply for an account. Be sure to include the {confirmation_link} tag after the email text so the confirmation link appears at the end of the email.
- **New CSLB Registration**: Enter the text that appears on the web page after the contractor confirms the account.
- **Registration Confirmation**: If CSLB verification is enabled, enter the text to appear on the contractor registration.

Permitting preferences

General

Use this tab to configure preferences for the permits section of your eTRAKiT public website.

Login

- **Required**: Select **False** to allow anonymous guest users to search records. Select **True** to require a user to log in before searching for records. If you select **True**, use the **Security** field to select the types of users who can search.
- **Security**: Select the access level necessary to schedule inspections online. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.
- **Query Filtering**: Select **True** to filter specific records from online access.
- **Anonymous Query Filtering**: Select **True** to allow anonymous users to search permits.
- **Public Query Filtering**: Select **True** to allow public users to search permits.
- **Contractor Query Filtering**: Select **True** to allow contractors to search permits.

- **Contractor Login**: If the **Security** field is set to **Require Contractor Login**, select **True** to limit searches to records where the contractor is linked as a contact.
- **Contractor Nametype**: If the **Security** field is set to **Require Contractor Login**, select **True** to limit searches to records where the contractor is identified as the permit contractor.
- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.

Search

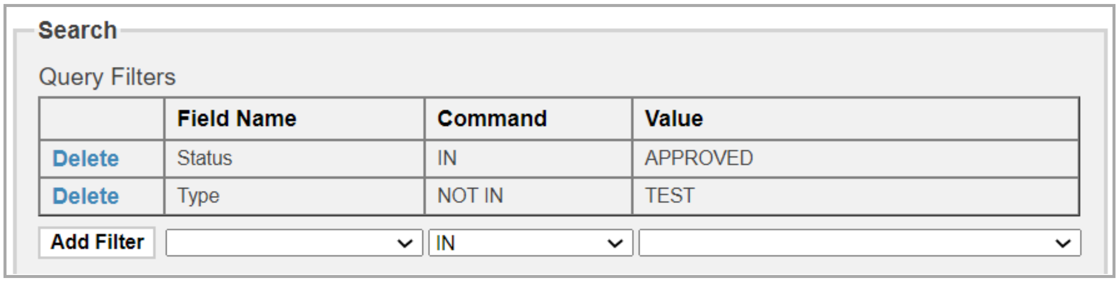
- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status**, **Type**, or **SubType**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Permitting** > **Status List** page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Permitting** > **Permit Types** > **Type List** page.
     - If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **Permitting** > **Subtypes** page.
  4. Select **Add Filter**.
  5. Repeat the previous steps to add additional filters.
  6. Select **Save**.

  To remove a filter, select **Delete** next to the filter you want to delete.

  You cannot change a filter you added. Delete the filter you do not want and then add a new filter.



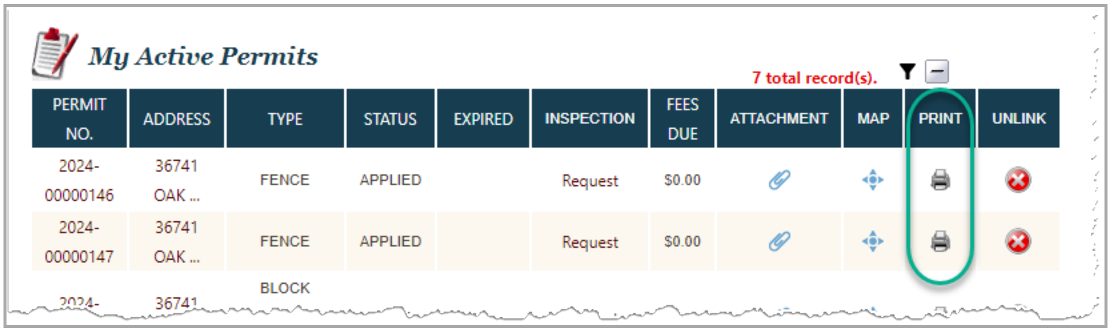
- **Examples**: Enter customized search examples for users to view. Use this field to provide hints that will help users search in the categories you make available. If you type text in this field, a **Click here for search examples** link appears on the **Search Contractors** page. When users select the link, a pop-up window appears and displays the text you entered in the **Examples** field.

Custom

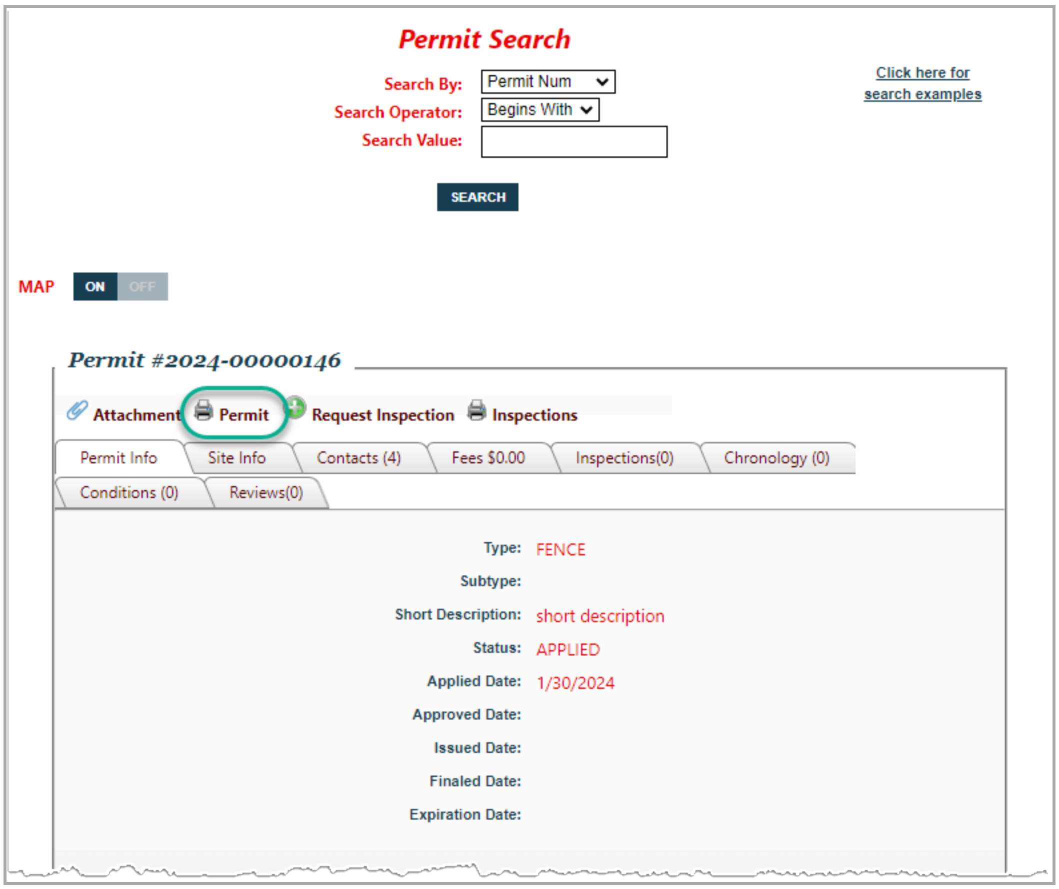
- **Heading**: Enter the heading for the module.
- **Search Page**: Enter the path to the agency's permit search page.
- **Module Button**: Enter the text for the custom permit search button.
- **Permit Notes**: Select **True** to allow notes to appear at the bottom of the record.
- **Apply Button**: Enter the text for the permit application button.
- **Permit Page**: Enter the URL address for your printable document.
- **Inspections Page**: Enter the URL to the agency's inspection form page.
- **Permit Notes Label**: Enter the heading text that appears for notes.
- **Inspections Header**: Enter the message to be displayed when the user starts the first step of the inspection process.

Display

- **Allow Public Linking**: Select **True** to allow public registered users to link to a record either already existing in Community Development or one created by another user in eTRAKiT. Linked records appear on the user's dashboard. Select **False** if you do not want to allow public registered users to link to records.
- **Show Print Permit Link**: This option controls whether the print option is available for permits listed on the user's dashboard under **My Active Permits**:



as well as on the permit information page when the user accesses a permit from the dashboard or by searching:



Select **True** to display the print option. If you select **True**, this field works in conjunction with the **Print Permit Status** field. The print option is available for permits that have one of the status values selected in the **Print Permit Status** field.

Select **False** to hide the print option.

- **Print Permit Status**: If **Show Print Permit Link** is **True**, select status values to allow printing the permit. When a permit has one of the selected status values, users can print the permit.

  Note: If **Show Print Permit Link** is **False**, this field is ignored.

- **Print Receipt Link**: Select **True** to display the printer icon and link on the receipt page of an existing permit after payment.
- **Due Date**: Select **True** to display review due dates.
- **Dates To Today**: If you select **True**, the inspection scheduled date and completed date are set to the current day when an inspector results an inspection. For example, if the inspection was scheduled for tomorrow but the inspector completes it today, Community Development sets the inspection scheduled date and the completed date to today's date.

  Select **False** if you do not want the inspection scheduled date and completed date automatically changed to the current date when an inspection is completed.
- **Print Inspections Link**: Select **True** to display the link to print the record inspections.
- **Schedule Link**: Select **True** to display the link to schedule inspections on the receipt page.
- **Anonymous**: Ctrl+click fields that appear for anonymous users.
- **Public Registered**: Ctrl+click fields that appear for public registered users.
- **Contractors**: Ctrl+click fields that appear for contractors.
- **Inspection Remarks**: Select **True** to display inspection remarks.
- **Inspection Remarks Caption**: Enter the label that appear for inspection remarks.
- **Inspection Notes**: Select **True** to display inspection notes.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select in **Visible Fields** when they log in to your eTRAKiT public website.

  The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

  If **Public Filtering** is **False**, this field is not used.

- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

  The options are:

  - **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
  - **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
  - **Site Information**: Show the **Site Info** tab, which includes address, property type, APN, and other site details, as well as a link to show the address on a map.
  - *module* **Information**: Show the module information tab (such as **Permit Info** or **License Info**). This tab includes record type, subtype, status, and other record details that vary by module.
  - **Contact Information**: Show the **Contacts** tab, which lists each contact type on the record with contact name and address.
  - **Payment Information**: Show the **Fees** tab, which lists fee description, fee amount, and paid date for each fee on the record, as well as total fees charged and total fees due.
  - **Chronology Information**: Show the **Chronology** tab, which lists actions on the record with action date, staff name the action is assigned to, and notes about the action.
  - **Inspection Information**: Show the **Inspections** tab, which lists inspections on the record, inspection result, scheduled date and time, completed date and time, and a link to more information.

    Public registered users can schedule and cancel inspections only if they have access to this tab.
  - **Review Information**: Show the **Reviews** tab, which lists reviews on the record, reviewer, related dates, and a link to more information.
  - **Conditions**: Show the **Conditions** tab, which lists conditions on the record, related department, status, and related dates, as well as a link to more information.
  - **Attachments**: On the module information tab, show a list of attachments with links to open the files.
  - **Custom Screens**: Show tabs for each custom screen defined for this record.

- **Review Remarks**: Select **True** to display review remarks.
- **Review Notes**: Select **True** to display review notes.
- **Hide Notes**: Select specific result statuses on which to hide the review notes.
- **Inspection Viewing**: Select the specific record types for which inspections can be viewed online.
- **Expired Public Column**: Select **True** to display expired dates on active public permits.
- **Expired Public Permits**: Select **True** to display expired public permits.
- **Expired Public Status**: Select specific statuses to exclude for expired public permits.
- **Expired Contractor Column**: Select **True** to display expired dates on active contractor permits.
- **Expired Contractor Permits**: Select **True** to display expired contractor permits.
- **Expired Contractor Status**: Select specific statuses to exclude for expired contractor permits.

Attachments (General tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Review Status**: Select specific statuses to allow attachment uploads.
- **Email Subject**: Enter subject text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: Attachment added for {Site_Addr}.
- **Security**: Select the access level necessary to upload attachments. The options are:
  - **Require Contractor Login**: Only registered contractors can upload attachments.
  - **Require Self-Registration**: Only public registered users can upload attachments.
  - **Either**: Registered contractors or public registered users can upload attachments.
- **Notify**: Select **True** to send an email message to reviewers that an attachment has been uploaded.
- **Email Body**: Enter body text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: An attachment was added for {Site_Addr}.

Payment

- **Online**: Select **False** if you do not want to allow permits to be paid online. Select **True** to allow payment of existing permits. If you select **True**, you must complete additional steps to fully enable online payments. For more information, see Applications/Online Payments (page 3).

- **Paid Status**: Enter the message that appears after the fees have been paid online.
- **Permit Status**: Select status options for records to display after they have been paid online.

> **Note:** If you set the above options, these settings override the **Change Status on ISSUED date TO** setting in WUM Permitting > **Preferences** > **Default Triggers** (module level) or Permitting > **Permit Types** > *permit type* > **Preferences** > **Triggers** (permit type level).

- **Security**: Select the access level necessary for online payments. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

Resources

- **Web Links**: Select **True** to display internet web links defined in your Community Development system setup. Web links are displayed at the bottom of the record.
- **Web Link Title(s)**: Enter your internet web links defined in Community Development. Web link names are case sensitive, separated by commas, and follow this format:

  {ACTIVITY_NO}, {RECORD_ID}

  The **Web Links** field must also be set to **True**.
- **Show for**: Select **All** to display internet web links for all users. Select **Contractor Only** to display web links for logged-in contractors only.
- **Issued Date**: Select **True** to assign an issued date after all outstanding fees are paid in eTRAKiT. This feature is for use with existing permits only.

  If this field is **True**, settings in WUM **Module Configuration** > **Permitting** determine when the issue date is assigned. If this field is **False**, the issue date is never assigned when permit fees are paid in eTRAKiT.
- **Issued By**: Type text, such as agency name, to appear next to the issued date on the record.

eNotify

- **Applicant Response**: Select **True** to enable online responses for the applicant.
- **Review Status**: Select review statuses for which an online response is allowed.
- **Email Subject**: Type subject line text for the email to notify an applicant.
- **Email Body**: Type body text for the email to notify an applicant.

Inspections

This tab is used to configure user preferences for permit inspections on your eTRAKiT public website.

Login

- **Security**: Select the access level necessary to schedule inspections online. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

Requests

- **Inspection Requests**: Select **True** to allow users to request inspections online.
- **Request Type**: If the **Inspection Requests** field is set to **True**, select **Add New Inspections** to allow users to add inspections, **Schedule Existing** to allow users to only schedule existing inspections, or **Both** to allow users to add inspections and schedule existing inspections on permits.
- **Require Link for Public Request**: Select **True** if you want to require public registered users to be linked to a permit before they can request an inspection for that permit. Select **False** if you do not want to implement this requirement.
- **Require Contractor Contact Type**: Select **True** to allow logged-in contractors to request inspections only if the contractor’s contact type includes the word *contractor*. Select **False** if you do not want to implement this requirement.
- **Contractor Cancel**: Select **True** to give contractors the ability to cancel their own inspections. This field applies only if the **Security** field in the **Login** pane is set to **Require Contractor Login**.
- **Public Cancel**: Select **True** to give self-registered users the ability to cancel their own inspections.
- **Cancel Cut-Off**: Choose the cut-off time for canceling inspections by choosing the hour, minute, AM or PM, and whether the deadline is the day of the inspection or the day before the inspection.
- **Cut-Off Date Type**: Select **Work Dates** to exclude nonwork days and holidays as defined in the agency calendar. For more details, refer to “Agency Calendar” in the Community Development WUM guide. This field applies only if **Cancel Cut-Off** day is **Day Before Inspection**.
- **Email Verification**: Select **True** to email the applicant a confirmation message.
- **Email**: Enter the text for the body of the confirmation email to be sent.
- **Email Address**: Enter the email address to send inspection requests. This setting only applies if the **Email Verification** field is set to **True**.
- **Weekend Days**: Select **True** to include weekends as business days in counts.

- **Paid Permits**: Select **True** to restrict inspection requests to records that are paid in full (have a $0 balance). Select **False** to allow inspection requests for all records, regardless of the balance.
- **Permit Types**: Select the record types for which inspection requests are accepted.
- **Permit Status**: Select status types for which inspection requests are accepted. For more information, see How do I define online inspections by permit type? (page 79)
- **Page Rows**: Select number of rows to show per page.
- **Restrict License Types**: Select **True** to restrict inspections to specific license types.
- **Dates to Today**: If you select **True**, the inspection scheduled date and completed date are set to the current day when an inspector results an inspection. For example, if the inspection was scheduled for tomorrow but the inspector completes it today, Community Development sets the inspection scheduled date and the completed date to today's date.

  Select **False** if you do not want the inspection scheduled date and completed date automatically changed to the current date when an inspection is completed.
- **Min Days**: Type the minimum number of days in advance that an inspection can be scheduled. Type **0** to allow same-day scheduling, type **1** for the next business day, and so on.

  Note: If requests are made after the time in the **Cut-Off Time** field, the current day is not included in the minimum number of days.
- **Max Days**: Type the maximum number of days in advance that an inspection can be scheduled.

  Note: Nonworkdays and holidays defined in the WUM Agency Calendar are excluded when counting minimum and maximum days. If the inspector has daily caps set in WUM, the inspector's available workdays (defined in the inspector's calendar in Community Development) are considered in the count. See the Community Development WUM guide for more details about the agency calendar and inspector caps.
- **Hide Time**: Select **True** to hide the **Time** field during an inspection request. This setting also applies to a permit application inspection request.
- **Cut-Off Time**: Enter the cut-off time for counting the current day towards the inspection minimum days advance notice when scheduling inspections. Times are entered in any of the following formats: 01:00 PM, 01:00PM, 1:00 PM, or 1:00 PM
- **Inspection Types**: If the **Adv Type Filtering** field is set to **False**, select the inspection types for which online inspection requests are allowed.
- **Adv Type Filtering**: Select **True** to override the list above and allow requests for inspection types to be defined in your Community Development database configuration. For more information, see How do I define online inspections by permit type? (page 79).

- **Disable Daily Sched Export**: To allow eTRAKiT users to export their inspections, select **False**. This makes the Export function available.

  To hide the Export feature, select **True** (the Export feature is disabled).
- **Disable VOID**: Select **False** to enable void transactions.
- **Inspector to User**: Select **True** to make the logged-in user the default inspector on a new inspection.
- **Add Inspection**: Enter a customized message that appears below the **Add Inspections** button on the inspections request page.
- **Request Policy**: Enter the agency's inspection request policy for display.
- **Disclaimer**: Type text for disclaimer message at the bottom of the **Today's Inspections** page.

Display

- **Cancel Confirmation**: Select **True** for a cancel confirmation prompt when inspections have been canceled.
- **Show Remarks**: Select **True** to display remarks for permit inspections.
- **Remarks Caption**: Enter the label that appears for permit inspection request remarks.
- **Daily Scheduled**: Select **True** to view the current day's inspections and future inspections in the inspection section.

Application

This tab is used to configure user preferences for permit applications on your eTRAKiT website.

Login

- **Security**: Select the access level necessary to schedule inspections online. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.
- **Contractor Restriction**: Select **True** to limit contractor access to specific AEC (Architects, Engineers, Contractors) types and subtypes for permit applications.
- **Public User Restriction**: Select **True** to limit public user access to specific types and subtypes for permit applications.

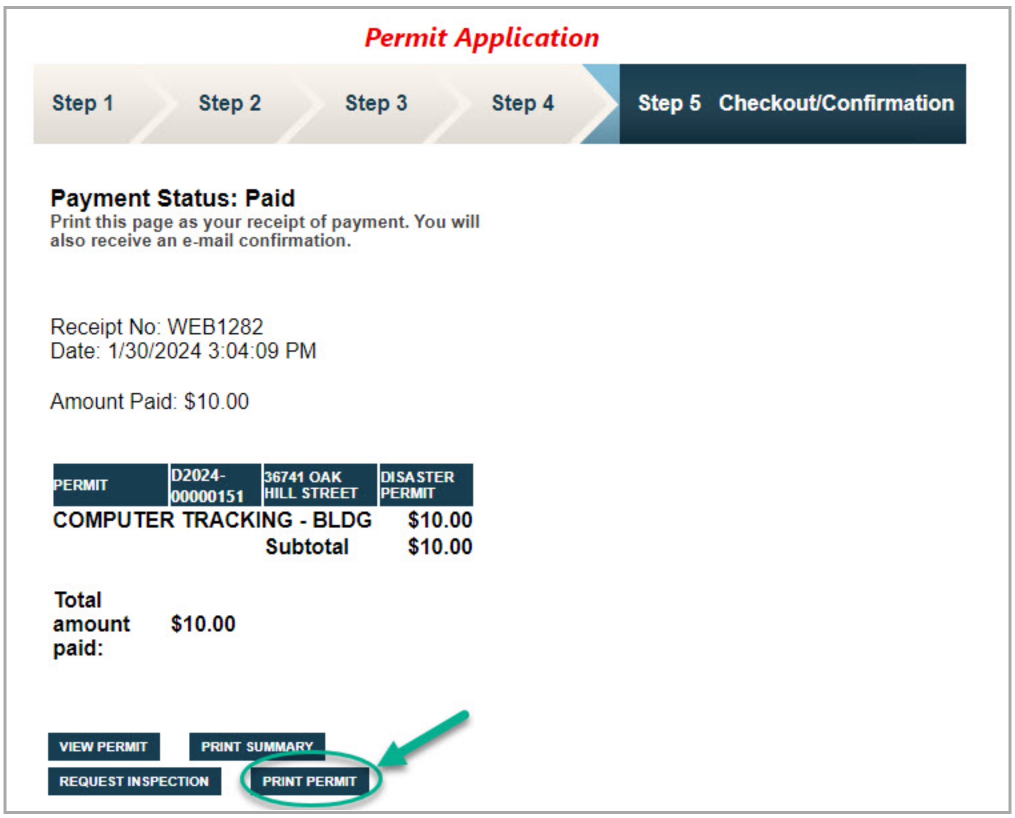
Custom

- **New Prefix**: Enter the prefix available in WUM to set the online prefix for new records. If this field is left empty, eTRAKiT uses the prefix that is set in the Community Development database.

- **New Status**: Enter the default status assigned to applications submitted online. This status must be defined in WUM. If you enter a status in this field, this status overrides your selections in WUM for the following options:
  - **Module Configuration** > **Permitting** > **Permit Types** > *type* > **Preferences** > **Triggers** > **Default Status for New Permit**
  - **Module Configuration** > **Permitting** > **Preferences** > **Default Triggers** > **Default Status for New Permit**
- **Address Entry**: Select **True** to enable address entry.
- **Search By Parcel**: Select **True** to enable searching by parcel.
- **Search Parcel Label**: Enter the specific parcel label to search.
- **Confidential Error**: Enter the message that appears when the applicant cannot be set as confidential.
- **Additional**: Enter text to change the screen label above the user-defined fields.
- **Instructions Path**: Enter **~/custom/** in this field to configure links to agency PDF files that explain the requirements of each permit or project. When a record type is selected, a URL to the PDF is generated and the PDF appears. The PDF file names should exactly match the record types from the application. For example, permit type **Mechanical** should have a related PDF named Mechanical.pdf. Each agency generates and maintains its own PDF files.
- **Description Label**: Type text to display a short description.
- **Disclaimer Page**: Select **True** to display a confirmation page before beginning the application process. Users will have the option to agree, which begins the application process, or disagree, which redirects them to the home page.
- **Lock Contractor**: Select **True** to lock contractor information.
- **Email to Applicant**: Select **True** to default email to applicant after permit application.
- **Address Not Found**: Type text to display a message if an address is not found, for example: “Please call the city desk for inquiries.”
- **Disclaimer**: Type body text to display a custom confirmation message on the confirmation page of the application process.
- **Lock Message**: Type text for the message that appears when contractor information has been locked.
- **No Fees**: Type message to display confirmation of no fees.
- **Confidential Applicant**: Type message to set applicant as confidential contact when owner is confidential.

Display

- **Show More Info**: Select **True** to display more information fields, and then select the Set Required Fields link to select which fields are required from the drop-down menu.
- **Populate Contacts**: Select **True** to always include applicant, contractor, and owner contact information.
- **Hide Short Description**: Select **True** to hide the text displayed for a description caption.
- **Hide Relationship**: Select **True** to suppress display of project relationship.
- **Hide by Type**: Select permit types on which to hide the relationship of the applicant.
- **Show Print Permit Link (Receipt Screen)**: This option controls whether users can print the permit at the final step of the permit application process. If you select **True**, the **PRINT PERMIT** link is available to applicants:



  If you select **False**, the **PRINT PERMIT** link does not appear.

- **Issued Permit Link**: Select **True** to display an issued permit report link.

- **Applicant ID**: Select **True** to allow a contractor to change the applicant's license number. Upon permit creation, it links the applicant to the Entity Management record if the license number matches the main Entity Management record.
- **Required**: Select fields that are required to accept an online application during the first step of the process.
- **Owner**: Select fields that are required to add owner information during the second step of the online application process.
- **Contractor**: Select fields that are required to add contractor information during the second step of the application process.
- **Applicant**: Select fields that are required to add applicant information during the second step of the application process.
- **Additional Contractor**: Select the fields that are required for additional contractors.

Job Value

- **Zero Balance**: Select **True** to enable permit creation on records with a zero balance.
- **Fee Select**: Select **True** to enable selection of individual fees on step 3 of the application process based on settings on the **Fees Allowed** page in WUM. If set to **False**, the application process will only consist of four steps.
- **Validate**: Select **True** to enable validation of the job value based on the AEC maximum job value. Validation applies to logged-in contractors only.
- **Zero Quantity**: Select **True** to enable entry of zero on selected fees.
- **Dynamic Collect**: Select **True** to enable the user to input values for individual fees.
- **Fee Select Warning**: Type text for custom warning message when it requires **Fee Select**. The message appears when the **Zero Balance** field is set to **False**.
- **Dynamic Message**: Type text for custom dynamic job value message.
- **Validate Warning**: Type text for a pop-up message when the contractor is not licensed for a classification or is limited.

Payment

You can use options in WUM or eTRAKiT Administrator to define whether you want to allow payments in eTRAKiT for a permit type. By default, eTRAKiT uses the setting in eTRAKiT Administrator. But if you select the **Skip Processing(in WUM)** check box, eTRAKiT uses the **Prevent eTRAKiT Payment** check box in WUM **Module Configuration** > **Permitting** > **Permit Types** > *permit type* > **Status List**.

- **Skip Processing**: Select permit types for which you want to restrict payments in eTRAKiT. When you select a permit type, payments cannot be made through eTRAKiT for any permits of that type. However, if you select the **Skip Processing(in WUM)** check box, these selections are not used. Instead, settings in WUM **Module Configuration** > **Permitting** > *permit type* are used.

- **Skip Processing(in WUM)**: Select this check box to use WUM settings (rather than selections in the **Skip Processing** field) for each permit type to allow or restrict payments by permit type in eTRAKiT. Clear this check box to use your selections in the **Skip Processing** field to allow or restrict payments by permit type in eTRAKiT.
- **Message**: Type text for the custom confirmation message that appears during the permit application process when the payment is skipped.

Fee Estimator

- **Enable**: Select **True** to enable estimates of job costs before applying for a permit or project.
- **Confirmation Page**: Select **True** to display the fee estimator details.
- **Require Login**: Select **True** to override the **Enable** field. Only public registered users can now use the fee estimator.
- **Instructions**: Type text to display a message about how the fee estimator works.
- **Disclaimer**: Type text to display a disclaimer message about the fee estimator.
- **Confirmation Message**: Type text to display a message with the fee estimator details.

Attachments (Application tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Message**: Enter the message that you want to display in the **Attachments** section of applications. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

Projects and Planning preferences

General

This tab is used to configure user preferences for project searches on your eTRAKiT public website.

Login

- **Required**: Select **False** to allow anonymous guest users to search records. Select **True** to require a user to log in to search records. If you select **True**, set the access level in the **Security** field.

- **Security**: Select the access level necessary to search records. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either**.
- **Contractor Login**: If the **Security** field is set to **Require Contractor Login**, select **True** to limit searches to records where the contractor is linked as a contact.
- **Contractor Nametype**: If the **Security** field is set to **Require Contractor Login**, select **True** to limit searches to records where the contractor is listed as the contractor.
- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status**, **Type**, or **SubType**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Projects and Planning** > **Status List** page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Projects and Planning** > **Project Types** > **Type List** page.
     - If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **Projects and Planning** > **Subtypes** page.
  4. Select **Add Filter**.
  5. Repeat the previous steps to add additional filters.
  6. Select **Save**.

  To remove a filter, select **Delete** next to the filter you want to delete.

  You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

Search

Query Filters

	Field Name	Command	Value
Delete	Status	IN	APPROVED
Delete	Type	NOT IN	TEST
Add Filter		IN	

- **Examples**: Enter customized search examples for users to view. Use this field to provide hints that will help users search in the categories you make available. If you type text in this field, a **Click here for search examples** link appears on the **Search Contractors** page. When users select the link, a pop-up window appears and displays the text you entered in the **Examples** field.

Custom

- **Heading**: Type text for the module heading.

Display

- **Allow Public Linking**: Select **True** to allow public registered users to link to a record either already existing in Community Development or one created by another user in eTRAKiT. Linked records appear on the user's dashboard. Select **False** if you do not want to allow public registered users to link to records.
- **Anonymous**: Ctrl+click fields to display for anonymous users.
- **Public Registered**: Ctrl+click fields to display for public registered users.
- **Contractors**: Ctrl+click fields to display for contractors.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select in **Visible Fields** when they log in to your eTRAKiT public website.

  The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

  If **Public Filtering** is **False**, this field is not used.

- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

  The options are:

  - **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
  - **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
  - **Site Information**: Show the **Site Info** tab, which includes address, property type, APN, and other site details, as well as a link to show the address on a map.
  - *module* **Information**: Show the module information tab (such as **Permit Info** or **License Info**). This tab includes record type, subtype, status, and other record details that vary by module.
  - **Contact Information**: Show the **Contacts** tab, which lists each contact type on the record with contact name and address.
  - **Payment Information**: Show the **Fees** tab, which lists fee description, fee amount, and paid date for each fee on the record, as well as total fees charged and total fees due.
  - **Inspection Information**: Show the **Inspections** tab, which lists inspections on the record, inspection result, scheduled date and time, completed date and time, and a link to more information.

    Public registered users can schedule and cancel inspections only if they have access to this tab.
  - **Conditions**: Show the **Conditions** tab, which lists conditions on the record, related department, status, and related dates, as well as a link to more information.
  - **Review Information**: Show the **Reviews** tab, which lists reviews on the record, reviewer, related dates, and a link to more information.
  - **Chronology Information**: Show the **Chronology** tab, which lists actions on the record with action date, staff name the action is assigned to, and notes about the action.
  - **Attachments**: On the module information tab, show a list of attachments with links to open the files.
  - **Custom Screens**: Show tabs for each custom screen defined for this record.

- **Review Remarks**: Select **True** to display review remarks.
- **Review Notes**: Select **True** to display review notes.
- **Hide Notes**: Select specific result statuses on which to hide the review notes.
- **Project Notes**: Select **True** to display project notes.
- **Inspection Remarks**: Select **True** to display inspection remarks.
- **Inspection Remarks Caption**: Enter the label that appear for inspection remarks.

Attachments (General tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Security**: Select the access level necessary to upload attachments. The options are:
    - **Require Contractor Login**: Only registered contractors can upload attachments.
    - **Require Self-Registration**: Only public registered users can upload attachments.
    - **Either**: Registered contractors or public registered users can upload attachments.
- **Notify**: Select **True** to send an email message to reviewers that an attachment has been uploaded.
- **Email Subject**: Enter subject text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: Attachment added for {Site_Addr}.
- **Status**: Select specific statuses to allow attachment uploads.
- **Email Body**: Enter body text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: An attachment was added for {Site_Addr}.

Payment

- **Online**: Select **True** to allow payment of existing permits. In addition, configure shopping cart preferences, as well as the **Permit Application** check box under Applications/Online Payments to fully enable online payments.
- **Paid Status**: Enter the message that appears after the fees have been paid online.
- **Security**: Select the access level necessary for online payments. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

Resources

- **Web Links**: Select **True** to display internet web links defined in your Community Development system setup. Web links are displayed at the bottom of the record.
- **Web Link Title(s)**: Enter your internet web links defined in Community Development. Web link names are case sensitive, separated by commas, and follow this format:

  {ACTIVITY_NO}, {RECORD_ID}

  The **Web Links** field must also be set to **True**.

eNotify

- **Applicant Response**: Select **True** to enable online responses for the applicant.
- **Review Status**: Select review statuses for which an online response is allowed.
- **Subject**: Enter subject line text for the email to notify an applicant.
- **Body**: Enter body text for the email to notify an applicant.

Application

This tab is used to configure user preferences for project applications on your eTRAKiT website.

Login

- **Security**: Select the access level necessary for users to apply online for a project. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.
- **Contractor Restriction**: Select **True** to restrict online project applications to specific project types and subtypes when a logged-in contractor applies for a project. Select **False** if logged-in contractors can apply for any project type or subtype.

  > **Tip:** Define the list of available project types in the eTRAKiT_Contractor_Project_Applications table.

- **Public User Restriction**: Select **True** to restrict online project applications to specific project types and subtypes when a logged-in public user applies for a project. Select **False** if logged-in public users can apply for any project type or subtype.

  > **Tip:** Define the list of available project types in the eTRAKiT_Public_Project_Applications table.

Custom

- **Description Label**: Type the text to display as a short description.
- **New Status**: Enter the default status assigned to applications submitted online. This status must be defined in WUM. If you enter a status in this field, this status overrides your selection in WUM **Module Configuration** > **Projects and Planning** > **Preferences** > **Triggers** > **Default Status for New Project** fields.
- **Disclaimer Page**: Select **True** to display a confirmation page before beginning the application process. Users will have the option to agree, which begins the application process, or disagree, which redirects them to the home page.
- **Instructions Path**: Enter **~/custom/** in this field to configure links to agency PDF files that explain the requirements of each permit or project. When a record type is selected, a URL to the PDF is generated and the PDF appears. The PDF file names should exactly match the record types from the application. For example, permit type **Mechanical** should have a related PDF named Mechanical.pdf. Each agency generates and maintains its own PDF files.
- **Address Entry**: Select **True** to enable address entry.
- **Additional**: Type text to change the screen label above the user-defined fields.
- **Search By Parcel**: Select **True** to enable searching by parcel.
- **Search Parcel Label**: Select the specific parcel label to search.
- **Email to Applicant**: Select **True** to send an email to the applicant after the project application is completed.
- **Confidential Error**: Enter the label that appears when the applicant cannot be set as confidential.
- **More Info**: Select **True** to display more information fields, and then select the **Set Required Fields** link to select which fields are required from the drop-down menu.
- **New Declaration**: Type the declaration text to display for a new project application.
- **Disclaimer**: Type the body text to display a custom confirmation message on the confirmation page of the application process.
- **No Fees**: Type the message that appears to confirm that no fees are required for this application.
- **Confidential Applicant**: Type the message to set the applicant as a confidential contact when the owner is confidential.

Display

- **Required**: Choose fields that are required to accept an online application during the first step of the process.

- **Populate Contacts**: Select **True** to always include the applicant, contractor, and owner contact information.
- **Owner**: Choose fields that are required to add owner information during the second step of the online application process.
- **Applicant**: Choose fields that are required to add applicant information during the second step of the online application process.
- **Hide Relationship**: Select **True** to suppress the display of the project relationship.
- **Hide By Type**

  Tip: Hold down the Ctrl key to select multiple lines.

Attachments (Application tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Message**: Enter the message that you want to display in the **Attachments** section of applications. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

Payment

You can use options in WUM or eTRAKiT Administrator to define whether you want to allow payments in eTRAKiT for a project type. By default, eTRAKiT uses the setting in eTRAKiT Administrator. But if you select the **Skip in WUM** check box, eTRAKiT uses the **Prevent eTRAKiT Payment** check box in WUM **Module Configuration** > **Projects and Planning** > **Project Types** > *project type* > **Status List**.

- **Skip Processing**: Select project types for which you want to restrict payments in eTRAKiT. When you select a project type in this field, payments cannot be made through eTRAKiT for any project of that type. However, if you select the **Skip in WUM** check box, these selections are not used. Instead, settings in WUM **Module Configuration** > **Projects and Planning** > **Project Types** > *project type* are used.
- **Skip Processing(In WUM)**: Select this check box to use WUM settings (rather than selections in the **Skip Processing** field) for each project type to allow or restrict payments by project type in eTRAKiT. Clear this check box to use your selections in the **Skip Processing** field to allow or restrict payments by project type in eTRAKiT.
- **Message**: Enter body text for a custom confirmation message that appears during the project application process when the payment is skipped.

Fee Estimator

- **Enable**: Select **True** to enable estimates of job costs before applying for a permit or project.
- **Require Login**: Select **False** to allow all users to use the fee estimator, regardless of whether they are logged in. Select **True** to require users to log in before using the fee estimator. This field applies only if the **Enable** field is **True**.
- **Confirmation Page**: Select **True** to display the fee estimator details.
- **Instructions**: Type text to display a message about how the fee estimator works.
- **Disclaimer**: Type text to display a disclaimer message about the fee estimator.
- **Confirmation Message**: Type text to display a message with the fee estimator details.

Licensing preferences

General

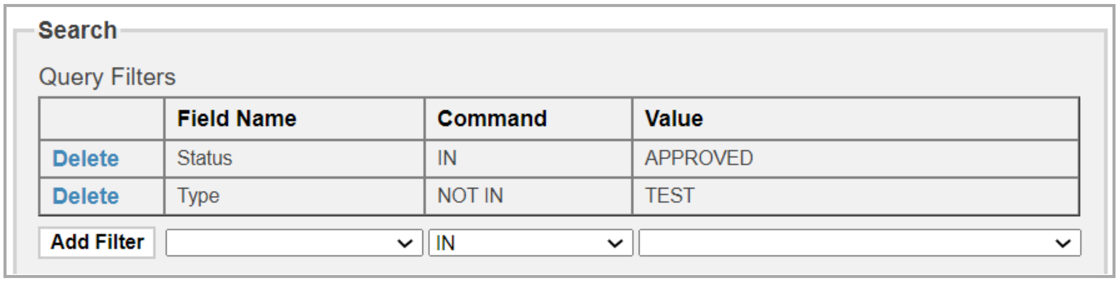
This tab is used to configure user preferences for license searches on your eTRAKiT public website.

Login

- **Required**: Select **False** to allow anonymous guest users to search records. Select **True** to require a user login to be able to search records. If you select **True**, only the type of registered users specified in the **Security** field will be able to search records.
- **Security**: Select the type of user who can search records. This field is used only if the **Required** field is **True**. The options are:
    - **Require Contractor Login**: Only registered contractors can search records.
    - **Require Self-Registration**: Only public registered users can search records.
    - **Either**: Registered contractors or public registered users can search records.
- **Contractor Login**: Select **True** to limit records to those the contractor is linked to as a contact.
- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.



To add filters, complete the following steps:

1. Select the filter criteria: **Status**, **Type**, or **SubType**.
2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
3. Select the value:
   - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Licensing** > **Status List** page.
   - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Licensing** > **License Types** > **Type List** page.
   - If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **Licensing** > **Subtypes** page.
4. Select **Add Filter**.
5. Repeat the previous steps to add additional filters.
6. Select **Save**.

To remove a filter, select **Delete** next to the filter you want to delete.

You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

- **Examples**: Enter customized search examples for users to view. Use this field to provide hints that will help users search in the categories you make available. If you type text in this field, a **Click here for search examples** link appears on the **Search Contractors** page. When users select the link, a pop-up window appears and displays the text you entered in the **Examples** field.

Custom

- **Heading**: Type the heading for the module.
- **License Page**: Type the URL address for your printable document.

Display

- **Allow Public Linking**: Select **True** to allow public registered users to link to a record either already existing in Community Development or one created by another user in eTRAKiT. Linked records appear on the user's dashboard. Select **False** if you do not want to allow public registered users to link to records.
- **Print License Link**: Select **True** to display the printer icon and link after a license number has been selected from **My Dashboard**. If you select **True**, this field works in conjunction with the **Print License Status** field. The print option is available for licenses that have one of the status values selected in the **Print License Status** field.
- **Print License Status**: If **Print License Link** is **True**, select status values to allow printing the license. When a license has one of the selected status values, users can print the license.

  Note: If **Print License Link** is **False**, this field is ignored.
- **Print Receipt Link**: Select **True** to display the printer icon and link on the receipt page of an existing license after payment.
- **Review Notes**: Select **True** to display review notes.
- **Hide Notes**: Select specific result statuses on which to hide the review notes.
- **Inspection Remarks**: Select **True** to display inspection remarks.
- **Inspection Remarks Caption**: Enter the label that appear for inspection remarks.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select in **Visible Fields** when they log in to your eTRAKiT public website.

  The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

  If **Public Filtering** is **False**, this field is not used.
- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

The options are:

- **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
- **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
- *module* **Information**: Show the module information tab (such as **Permit Info** or **License Info**). This tab includes record type, subtype, status, and other record details that vary by module.
- **Additional License Information**: Show the **Additional Info** tab, which shows licensee contact information and license **Info 2 Caption** fields. **Info 2 Caption** fields are custom-label fields defined in WUM.
- **Site Information**: Show the **Site Info** tab, which includes address, property type, APN, and other site details, as well as a link to show the address on a map.
- **Contact Information**: Show the **Contacts** tab, which lists each contact type on the record with contact name and address.
- **Payment Information**: Show the **Fees** tab, which lists fee description, fee amount, and paid date for each fee on the record, as well as total fees charged and total fees due.
- **Inspection Information**: Show the **Inspections** tab, which lists inspections on the record, inspection result, scheduled date and time, completed date and time, and a link to more information.

  Public registered users can schedule and cancel inspections only if they have access to this tab.
- **Chronology Information**: Show the **Chronology** tab, which lists actions on the record with action date, staff name the action is assigned to, and notes about the action.
- **Conditions**: Show the **Conditions** tab, which lists conditions on the record, related department, status, and related dates, as well as a link to more information.
- **Review Information**: Show the **Reviews** tab, which lists reviews on the record, reviewer, related dates, and a link to more information.
- **Attachments**: On the module information tab, show a list of attachments with links to open the files.
- **Custom Screens**: Show tabs for each custom screen defined for this record.

- **Anonymous**: Ctrl+click fields to display for anonymous users.
- **Public Registered**: Ctrl+click fields to display for public registered users.

- **Contractors**: Ctrl+click fields to display for contractors.

Attachments (General tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Security**: Select the access level necessary to upload attachments. The options are:
  - **Require Contractor Login**: Only registered contractors can upload attachments.
  - **Require Self-Registration**: Only public registered users can upload attachments.
  - **Either**: Registered contractors or public registered users can upload attachments.
- **Notify**: Select **True** to send an email message to reviewers that an attachment has been uploaded.
- **Send**: Select an option to indicate who should receive email notification for attachments. The options are:
  - **Single**: Send the notification to one user. Enter the email address in the unlabeled field below the **Send** field.
  - **Reviewers**: Send the notification to the reviewers group.
- **Subject**: Enter subject text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: Attachment added for {Site_Addr}.
- **Body**: Enter body text for the email message sent to reviewers when an attachment has been uploaded. To include a Community Development field in the text, enclose the field name in braces. For example: An attachment was added for {Site_Addr}.

Payment

- **FEIN or SSN**: Select **True** to require a Federal Tax ID Number or Social Security Number to be entered.
- **Online**: Select **True** to allow payment of existing permits. In addition, configure shopping cart preferences, as well as the **Permit Application** check box under Applications/Online Payments to fully enable online payments. For more information, see Applications/Online Payments (page 3).
- **Paid Status**: Enter the message that appears after the fees are paid online.
- **Security**: Select the access level necessary for online payments. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

eNotify

- **Applicant Response**: Select **True** to enable online responses for the applicant.
- **Subject**: Enter subject line text for the email to notify an applicant.
- **Review Status**: Select review statuses for which an online response is allowed.
- **Body**: Enter body text for the email to notify an applicant.

Application

This tab is used to configure user preferences for license applications on your eTRAKiT public website.

Login

- **Security**: Select the access level necessary to schedule inspections online. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.
- **Additional**: Type text to change the screen label above the user-defined fields.
- **No Fees**: Type message to display confirmation of no fees.

Custom

- **New Prefix**: Type the prefix available in WUM to set the online prefix for new records. If this field is left empty, eTRAKiT uses the prefix that is set in the Community Development database.
- **Email to Applicant**: Select **True** to default email to applicant after permit application.

Display

- **Populate Contacts**: Select **True** to always include Applicant, Contractor, and Owner contact information.
- **Print Link**: Select **True** to display the printer icon and link after a license number has been selected from **My Dashboard**.
- **Info Fields**: Choose the fields that are required to accept an online license application during the first step of the process.
- **Checkbox**: Choose the fields to provide check boxes for during the first step of the license application process.
- **UDF Fields**: Select **True** to display user-defined fields. Select **Set Required Fields** to select user-defined fields by license type.
- **Required**: Choose fields that are required during the first step of the online application process.
- **License Address**: Select specific fields to display on the application.
- **Hide Relationship**: Select **True** to suppress display of project relationship.

- **Populate Owner**: Select **True** to always add owner contact information from the Land Management module.

Tip: To select multiple lines, press the Ctrl key while making your selections.

Attachments (Application tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Message**: Enter the message that you want to display in the **Attachments** section of applications. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

Renewal

This tab is used to configure user preferences for license renewals on your eTRAKiT public website.

Login

- **Security**: Select the access level necessary to schedule inspections online. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

License Renewal Filter

Use options in this section to define which licenses appear in the **My Licenses For Renewals** section of the dashboard for registered users. You can include or exclude licenses based on status, record type, or record subtype.

To add filters, complete the following steps:

1. Select the filter criteria: **Status**, **Type**, or **SubType**.
2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
3. Select the value:
   - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Licensing** > **Status List** page.
   - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Licensing** > **License Types** > **Type List** page.

- If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **Licensing** > **Subtypes** page.

4. Select **Add Filter**.
5. Repeat the previous steps to add additional filters.
6. Select **Save**.

To remove a filter, select **Delete** next to the filter you want to delete.

You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

In the **Examples** field, enter customized search examples for users to view. Use this field to provide hints that will help users search in the categories you make available. If you type text in this field, a **Click here for search examples** link appears on the **License Search** page. When users select the link, a pop-up window appears and displays the text you entered in the **Examples** field.

Custom

- **Renewal Page**: Enter the URL for the custom agency license renewal page.
- **View General**: Ctrl+click general information fields to display on the renewal form.
- **Edit General**: Ctrl+click general fields in which the user can enter data on the form.
- **Require General**: Ctrl+click general information fields that are required.
- **View Additional**: Ctrl+click additional information fields to display on the renewal form.
- **Edit Additional**: Ctrl+click additional information fields to display on the renewal form.
- **Require Additional**: Ctrl+click additional information fields that are required.
- **Require Applicant**: Ctrl+click applicant fields that require data to be entered on the renewal form.
- **Header**: Enter the message that appears when the user starts the first step of the license renewal process.
- **No Fees**: Enter message to display confirmation of no fees.

Display

- **Additional**: Type text for additional information to display on the application renewal screen.
- **UDF Fields**: Select **False** if you do not want to display user-defined fields. Select **True** to display user-defined fields. If you select **True**, the **Set Required Fields** link appears. Select this link to choose the user-defined fields that will be required.

Entity Management preferences

General

Use this tab to configure preferences for Architects, Engineers, Contractors (AEC) and other contacts on your eTRAKiT public website.

Login

- **Required**: Select **False** to allow all users to search records. Select **True** to require users to log in to be able to search records. If you select **True**, only the type of registered users specified in the **Security** field will be able to search records.
- **Security**: Select the type of user who can search records. This field is used only if the **Required** field is **True**. The options are:
  - **Require Contractor Login**: Only registered contractors can search records.
  - **Require Self-Registration**: Only public registered users can search records.
  - **Either**: Registered contractors or public registered users can search records.
- **Max Records**: Select the default maximum number of records to retrieve when a user searches for AEC contacts.
- **Page Results**: Select the number of records to show per page when a user searches for AEC contacts.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status**, **Type**, or **SubType**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > AEC > Status List page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **AEC** > **AEC Types** > **Type List** page.

- If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **AEC** > **AEC Subtypes** page.

4. Select **Add Filter**.
5. Repeat the previous steps to add additional filters.
6. Select **Save**.

To remove a filter, select **Delete** next to the filter you want to delete.

You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

- **Examples**: Enter customized search examples for users to view. Use this field to provide hints that will help users search in the categories you make available. If you type text in this field, a **Click here for search examples** link appears on the **Search Contractors** page. When users select the link, a pop-up window appears and displays the text you entered in the **Examples** field.

Custom

- **Module Button**: Enter the label to display for the custom AEC search button.
- **Search Page**: Enter the URL for your agency’s custom AEC search page.
- **Heading**: Type text to display for the module heading.
- **Second Search**: Select **True** if you want to include a link to a third-party website (such as a state licensing board website) where users can search for AEC contacts.
- **Second Page**: Type the URL for the third-party website where users can search for AEC contacts.
- **Second Heading**: Type the link text for the link to the third-party website where users can search for AEC contacts.

Display

- **Anonymous**: Select the sections you want to include for anonymous users. Use the Shift key to select a range of sections. Use the Ctrl key to select specific sections.
- **Public Registered**: Select the sections you want to include for public registered users. Use the Shift key to select a range of sections. Use the Ctrl key to select specific sections.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select

in **Visible Fields** when they log in to your eTRAKiT public website.

The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

If **Public Filtering** is **False**, this field is not used.

- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

  The options are:

  - **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
  - **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
  - *module* **Information**: Show the module information tab (such as **Permit Info** or **License Info**). This tab includes record type, subtype, status, and other record details that vary by module.
  - **Licenses**: Show the **License** tab, which lists licenses the entity holds. The issuing agency, license number, issue date, and expiration date are displayed in the list.
  - **License Types**: Show the **Lic Types** tab, which lists the types of licenses the entity holds and the categories of licenses.
  - **Trust Account**: Show the **Trust Accts** tab, which lists trust accounts for the entity with trust account number, description, transaction date, amount, and cashier user ID.
  - **Insurance**: Show the **Ins Info** tab, which lists insurance policies the entity holds with insurance type, carrier, carrier phone number, policy number, issued date, and expiration date.
  - **Contact Information**: Show the **Contacts** tab, which lists each contact type on the record with contact name and address.
  - **Payment Information**: Show the **Fees** tab, which lists fee description, fee amount, and paid date for each fee on the record, as well as total fees charged and total fees due.

- **Chronology Information**: Show the **Chronology** tab, which lists actions on the record with action date, staff name the action is assigned to, and notes about the action.
- **Attachments**: On the module information tab, show a list of attachments with links to open the files.

- **Contractors**: Select the sections you want to include for contractors. Use the Shift key to select a range of sections. Use the Ctrl key to select specific sections.

Attachments (General tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Security**: Select the access level necessary to upload attachments. The options are:
  - **Require Contractor Login**: Only registered contractors can upload attachments.
  - **Require Self-Registration**: Only public registered users can upload attachments.
  - **Either**: Registered contractors or public registered users can upload attachments.

Payment

- **Online**: Select **True** to allow payment of existing permits. If you select **True**, configure shopping cart preferences and select the **Permit Application** check box in Applications/Online Payments (page 3) to fully enable online payments.
- **Paid Status**: Type the message that appears after the fees are paid online.
- **Review Status**: Select specific entity record statuses on which to apply the online paid status.
- **Security**: Select the type of user who can make online payments. The options are:
  - **Require Contractor Login**: Only registered contractors can make online payments.
  - **Require Self-Registration**: Only public registered users can make online payments.
  - **Either**: Registered contractors or public registered users can make online payments.

Application

Use this tab to configure user preferences for AEC applications on your eTRAKiT public website.

Caption

- **Additional**: Type the text you want to display as additional information on the application page.
- **No Fees**: Type the message you want to display when no fees are required for the application.

- **Disclaimer**: If you want to display a disclaimer before the application process begins, type the text of the disclaimer in this field. This text appears on a disclaimer page before the AEC application process begins. The disclaimer page includes **I Agree** and **I Disagree** options. The applicant must choose the **I Agree** option (which will begin the application process) or the **I Disagree** option (which will end the application process and display the home page). This field is used only if the **Disclaimer Page** field is **True**.

Custom

- **Email to Applicant**: Select **True** to send an email to the applicant after the AEC application is submitted.
- **Disclaimer Page**: Select **True** to display a disclaimer page before the first step in the application process.
- **Apply Button**: Type the label to display on the custom apply button.
- **New Status**: Enter the default status assigned to applications submitted online. This status must be defined in WUM. If you enter a status in this field, this status overrides your selection in WUM **Module Configuration** > **AEC** > **Preferences** > **Contractor Options** > **Default Status for New AEC Record** field.

Display

- **Company Fields**: Select company fields that will be required on the application. Use the Shift key to select a range of fields. Use the Ctrl key to select specific fields. The fields you select are listed in the **Required Company** field.
- **UDF Fields**: Select **False** if you do not want to display user-defined fields. Select **True** to display user-defined fields. If you select **True**, the **Set Required Fields** link appears. Select this link to choose the user-defined fields that will be required.
- **Required Company**: This field lists the company fields you selected in **Company Fields**.

Attachments (Application tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Message**: Enter the message that you want to display in the **Attachments** section of applications. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

Payment

- **Email Subject**: Type subject text for the email sent to an applicant.
- **Email Body**: Type body text for the email sent to an applicant.

AEC Expiration

Select the method for determining the license expiration date when a user applies for a license online. The options are:

- **Disabled**: The AEC license expiration date is not set.
- **End of current year**: The AEC license expiration date is set to December 31 of the current year.
- **One (1) year from application date**: The AEC license expiration date is set to one year after the application is submitted. If you select the **End of Month** option, the expiration date is set to the last day of the month in which the application is submitted.
- **Specific Date**: The license expiration date is set to the date you enter in the date field below this option.

Renewal

Use this tab to configure user preferences for license renewals on your eTRAKiT public website.

Custom

- **Company Info Fields**: Select company fields that will be required on the application. Use the Shift key to select a range of fields. Use the Ctrl key to select specific fields. The fields you select are listed in **Require Company** Fields.
- **Require Company Fields**: This field lists the company fields you selected in **Company Info Fields**.
- **Header**: Type the message that will appear when the user starts the license renewal process.
- **No Fees**: Type the message to display for the confirmation of no fees.

Display

- **Additional**: Type the text you want to display as additional information on the application renewal page.
- **UDF Fields**: Select **False** if you do not want to display user-defined fields. Select **True** to display user-defined fields. If you select **True**, the **Set Required Fields** link appears. Select this link to choose user-defined fields that will be required.
- **Will Expire Notification**: Type the message that appears when the AEC license will expire within 30 days.
- **Expired Notification**: Type the message that appears when the AEC license has expired.

Attachments (Renewal tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Message**: Enter the message that you want to display in the **Attachments** section of renewals. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

AEC Expiration

Select the method for determining the license expiration date for licenses that are renewed online. The options are:

- **Disabled**: The AEC license expiration date is not set.
- **End of current year**: The AEC license expiration date is set to December 31 of the current year.
- **One (1) year from application date**: The license expiration date is extended by one year. If you select the **End of Month** option, the expiration date is set to the last day of the month in which the license expires.
- **Specific Date**: The license expiration date is set to the date you enter in the date field below this option.

Parcel preferences

General

This tab is used to configure preferences for parcel searches on your eTRAKiT public website.

Login

- **Required**: Select **False** to allow anonymous guest users to search records. Select **True** to require a user login to search records. If you select **True**, set the access level in the **Security** field.
- **Security**: Select the access level necessary to search records. The options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either**.
- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status** or **Type**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Land Management** > **Status List** page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Land Management** > **GeoType List** page.
  4. Select **Add Filter**.
  5. Repeat the previous steps to add additional filters.
  6. Select **Save**.

  To remove a filter, select **Delete** next to the filter you want to delete.

  You cannot change a filter you added. Delete the filter you do not want and then add a new filter.
- **Examples**: Enter customized search examples for users to view. This text is linked to the **Click here for search examples** hyperlink on search pages.

Display

- **Anonymous**: Ctrl+click fields to display for anonymous users.
- **Public Registered**: Ctrl+click fields to display for public registered users.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select in **Visible Fields** when they log in to your eTRAKiT public website.

The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

If **Public Filtering** is **False**, this field is not used.

- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

  The options are:

  - **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
  - **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
  - **Address**: Show the module information tab (**Parcel Info**). This tab includes property type, APN, and other parcel details.
  - **Owner Information**: Show the **Contacts** tab. For parcels, only the record owner is listed with the owner’s name and address.
  - **Land Use**: Show the **Land Use** tab, which includes information related to zoning, census code, school district, and tax rate, as well as custom-label land use fields defined in WUM.
  - **Building Information**: Show the **Building** tab, which includes structure details such as the number of units, stories, bedrooms, and bathrooms, as well as the year built and custom-label building information fields defined in WUM.
  - **Legal Description**: Show the **Legal Desc** tab, which shows the legal description for the parcel.
  - **Inspection Information**: Show the **Inspections** tab, which lists inspections on the record, inspection result, scheduled date and time, completed date and time, and a link to more information.

    Public registered users can schedule and cancel inspections only if they have access to this tab.
  - **Attachments**: On the module information tab, show a list of attachments with links to open the files.

- **Restriction Details**: Show the **Restriction Details** tab, which lists restrictions on the parcel, including the restriction type, date the restriction was added, date the restriction was cleared, restriction description, and a link to more information.

- **Contractors**: Ctrl+click fields to display for contractors.
- **Inspection Remarks**: Select **True** to display remarks for parcel inspections.
- **Inspection Remarks Caption**: Enter the label to show for parcel inspection remarks.

Resources

- **Building Data UDF**: Select **True** to display information about building data from the Land Management module.
- **Web Links**: Select **True** to display internet web links defined in your Community Development system setup. Web links are displayed at the bottom of the record.
- **Web Link Title(s)**: Enter your internet web links defined in Community Development. Web link names are case sensitive, separated by commas, and follow this format:

  {ACTIVITY_NO}, {RECORD_ID}

  The **Web Links** field must also be set to **True**.

Code Compliance preferences

General

This tab is used to configure general user preferences for code compliance cases using your eTRAKiT website.

Login

- **Required**: Select **False** to allow anonymous guest users to search records. Select **True** to require a user login to be able to search records. If you select **True**, set the access level in the **Security** field.
- **Security**: Select the access level necessary to search records. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either**.
- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.

- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status**, **Type**, or **SubType**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **Code Compliance** > **Status List** page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **Code Compliance** > **Case Types** > **Type List** page.
     - If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **Code Compliance** > **Subtypes** page.
  4. Select **Add Filter**.
  5. Repeat the previous steps to add additional filters.
  6. Select **Save**.

  To remove a filter, select **Delete** next to the filter you want to delete.

  You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

- **Examples**: Enter customized search examples for users to view. This text is linked to the **Click here for search examples** hyperlink on search pages.

Custom

- **Module Button**: Enter the label to display for the custom code compliance case search button.
- **Search Page**: Enter the path to your agency’s custom **Case** search page.
- **Heading**: Enter the text to display for the module heading.

Display

- **Anonymous**: Ctrl+click fields to display for anonymous users.
- **Public Registered**: Ctrl+click fields to display for public registered users.
- **Contractors**: Ctrl+click fields to display for contractors.
- **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.

- **Contact Type**: If **Public Filtering** is **True**, select the contact type you want to configure, and then select options in **Visible Fields**. Contacts of the selected type can see the tabs you select in **Visible Fields** when they log in to your eTRAKiT public website.

  The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.

  If **Public Filtering** is **False**, this field is not used.

- **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. You can select multiple options in this field. When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

  If **Public Filtering** is **False**, this field is not used.

  The options are:

  - **No Display Information**: Do not show any tabs. If you select this option, only a blank module information tab is visible to users.
  - **Default Display Information**: Show the default tabs as configured in the **Public Registered** field for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.
  - **Site Information**: Show the **Site Info** tab, which includes address, property type, APN, and other site details, as well as a link to show the address on a map.
  - *module* **Information**: Show the module information tab (such as **Permit Info** or **License Info**). This tab includes record type, subtype, status, and other record details that vary by module.
  - **Contact Information**: Show the **Contacts** tab, which lists each contact type on the record with contact name and address.
  - **Payment Information**: Show the **Fees** tab, which lists fee description, fee amount, and paid date for each fee on the record, as well as total fees charged and total fees due.
  - **Inspection Information**: Show the **Inspections** tab, which lists inspections on the record, inspection result, scheduled date and time, completed date and time, and a link to more information.

    Public registered users can schedule and cancel inspections only if they have access to this tab.

- **Chronology Information**: Show the **Chronology** tab, which lists actions on the record with action date, staff name the action is assigned to, and notes about the action.
- **Violation Information**: Show the **Violations** tab, which lists each violation on the record with violation type, status, observed date, compliance date, corrected date, remarks, violation notes, and a link to more information.
- **Attachments**: On the module information tab, show a list of attachments with links to open the files.
- **Custom Screens**: Show tabs for each custom screen defined for this record.

- **Violation Comments**: Select **True** to hide notes and comments on violations. Users logged in with staff access and inspectors can still view notes and comments.
- **Inspection Viewing**: Select the specific code compliance case types for which inspections can be viewed online.
- **Show Remarks**: Select **True** to display remarks for code compliance case inspections.
- **Remarks Caption**: Enter the label to display for code compliance case inspection remarks.
- **Inspection Notes**: To show inspection notes in eTRAKiT, select **TRUE**. Inspection notes appear when you view case details, select the **Inspections** tab, and then select the **More Info** link. To hide inspection notes, select **FALSE**.

Attachments

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Security**: Select the access level necessary to upload attachments. The options are:
  - **Require Contractor Login**: Only registered contractors can upload attachments.
  - **Require Self-Registration**: Only public registered users can upload attachments.
  - **Either**: Registered contractors or public registered users can upload attachments.

Payment

- **Online**: Select **True** to allow payment of existing permits. In addition, configure shopping cart preferences, as well as the **Permit Application** check box under Applications/Online Payments to fully enable online payments.
- **Paid Status**: Enter the message that appears after the fees are paid online.
- **Security**: Select the access level necessary for online payments. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either** to allow either login access.

CRM

General

This tab is used to configure user preferences for CRM searches using your eTRAKiT website.

Login

- **Max Records**: Select the default maximum number of records to retrieve.
- **Page Results**: Select the number of records to show per page.
- **Public**: Select **True** to allow public users to search CRM records. Two matching issue fields must be entered.

Search

- **ReCAPTCHA**: Select **True** to require reCAPTCHA security for searching, adding users, resetting passwords, and using the **Contact Us** link.
- **Query Filters**: To exclude specific records from online searches, add filters to the **Query Filters** list. You can include or exclude records based on status, record type, or record subtype.

  To add filters, complete the following steps:

  1. Select the filter criteria: **Status**, **Type**, or **SubType**.
  2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
  3. Select the value:
     - If you selected **Status**, the options are the status values defined in WUM on the **Module Configuration** > **CRM** > **Status List** page.
     - If you selected **Type**, the options are the types defined in WUM on the **Module Configuration** > **CRM** > **Issue Types** > **Type List** page.
     - If you selected **SubType**, the options are the subtypes defined in WUM on the **Module Configuration** > **CRM** > **Subtypes** page.
  4. Select **Add Filter**.
  5. Repeat the previous steps to add additional filters.
  6. Select **Save**.

  To remove a filter, select **Delete** next to the filter you want to delete.

  You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

- **Examples**: Enter customized search examples for users to view. This text is linked to the **Click here for search examples** hyperlink on search pages.

Custom

- **Module Button**: Enter the label to display for the CRM module button on the main page.
- **Button Nav**: Select the default action for the CRM button on the main page of your eTRAKiT website. Options are **Search** to go directly to the CRM general page, and **Create Issue** to go to the create issue page.
- **Linked Activities**: Select **True** to display linked activities.
- **Require Number**: Select **True** to require an issue number when performing a public search.
- **Issue Name**: Enter the label to use for issues throughout CRM.
- **Issue Subject**: Enter the label to use for issue subjects throughout CRM.
- **Complainant**: Enter the label to use for complainants throughout CRM.

Display

- **Subject Info**: Select **True** to display subject's contact info online.
- **Complainant Info**: Select **True** to display complainant's contact info online.
- **CRM History**: Select **True** to display the history of the CRM issue online.
- **Hide Anonymous**: Select **True** to prevent display of anonymous CRM issues during a CRM issue search. Both **CRM Search** and **Violation Search** must be enabled. For more information about enabling search, see Modules/Features (page 2).
- **Links to Cases**: Select **True** to display linked cases as hyperlinks. Hyperlinks appear only if cases are viewable online.
- **Suppress Side Bar**: Select **True** to hide side menu for full screen display of records.
- **Dashboard**: Select **True** to display active CRM issues on the user dashboard when CRM search is disabled.
- **CRM Notes**: Select **True** to display CRM notes. **False** hides agency notes from users.

CRM Entry

This tab is used to configure user preferences for entry of CRM issues using your eTRAKiT website.

Login

- **Security**: Select the access level necessary to search records. Options are **Require Contractor Login** for contractor access only, **Require Self-Registration** for public registered access, and **Either**.
- **Anonymous**: Select **True** to allow anonymous entry of CRM issues.
- **Complainant**: Choose fields that are required complainant information to enter a CRM issue.

- **Issue**: Choose fields that are required for the CRM issue to be entered.
- **Force Lookup**: Select **True** to require search and verification of the address being entered.

Custom

- **Response Page**: Select **True** to include an optional response message in the Response field.
- **Issue Types**: Select the CRM issue types to be displayed as drop-down choices.
- **City, State, Zip**: Enter the default city, state, and zip to display on entry.
- **Searchable Geotypes**: Select which geotypes to include in a location search (for example, parcels, addresses, streets, hydrants).
- **Suppress Sidebar**: Select **True** to hide side menu for full screen display of records.
- **Response**: Enter a confirmation message to display after the issue is submitted. For example, "Your Issue Number {ISSUE} has been submitted." The variable {ISSUE} can be inserted to include the exact issue number as part of the customized message.
- **Disclaimer**: Enter an optional message to display a disclaimer on the issue entry form.

New Issues

- **Assigned User**: Select the Community Development user who is designated to handle the online issues.

  Note: This setting overrides the existing Community Development database setting for assignment of new issues.

- **Created Via**: Select the source you want to assign to issues submitted via eTRAKiT. Your selection overrides the default value in WUM, defined in **Module Configuration** > **CRM** > **Created Via**.
- **Submit Nav**: Enter the web page URL for directing users after online submissions.

Attachments (CRM Entry tab)

For more information about attachments, including file size and file name restrictions, refer to Attachments overview (page 75).

- **Upload**: To allow users to upload attachments, select **True**. If you select **True**, only the types of registered users specified in the **Security** field will be able to upload attachments.
- **Security**: Select the access level necessary to upload attachments. The options are:
  - **Require Contractor Login**: Only registered contractors can upload attachments.
  - **Require Self-Registration**: Only public registered users can upload attachments.
  - **Either**: Registered contractors or public registered users can upload attachments.

- None: Users can upload attachments without logging in.

- **Message**: Enter the message that you want to display in the **Attachments** section. For example, you might want to outline privacy guidelines, file name restrictions, or file size limits. You can format the text by using the **Design** options or HTML.

Shopping Cart preferences

Cart

This tab is used to configure shopping cart preferences for online user payments on your eTRAKiT public website.

Custom

- **Cart Header**: Enter a message to display above the shopping cart page.
- **Checkout Summary**: Enter a message to display below the **Checkout Summary** heading.
- **Cart Disclaimer**: Enter a message to display below the “number of items in the cart” statement.
- **Credit Card Entry**: Enter a message to display above the credit card fields.
- **Payment Receipt**: Enter a message to display below the **Payment Summary** heading on the receipt page.
- **Email Body**: Enter body text for the email confirmation message.

Display

- **Cart Button**: Select **True** to show the **Add** button on the shopping cart with pending payments.
- **Fee Details**: Select **True** to display detailed fee information on the third screen of the application process, the checkout summary, and the receipt page.
- **Payment Details**: Select **True** to send detailed email receipt to user.
- **Last Four Digits**: Select **True** to display the last four digits of the credit card number on the receipt.

Payment

General

- **AutoGen Receipt**: Enter **eTRAKiT_Receipt** to set up receipt numbers. For more details, see “AutoGen Numbers” in the *Community Development WUM Guide*.
- **Online Gateway**: Enter the URL to payment processor gateway.
- **Trust Account**: Select **True** to turn on a trust account payment option for contractors.
- **Populate User**: Select **True** to populate application information on the receipt page using values entered during checkout.

- **Select Fees**: Select **True** to expand fees so they can be selected individually for payment.
- **Validate Zip**: Select **True** to validate the ZIP Code entered on a credit card entry.
- **Email**: To send an email payment confirmation from your agency to the payer for payments made through eTRAKiT, select **True**. If you do not want to send an email payment confirmation, select **False**.

> **Note:** If CentralSquare Payments is your payment processor, you might want to set this field to **False**. After a citizen makes a payment, CentralSquare Payments automatically sends an email receipt to the citizen. If the **Email** field is **True**, the citizen will receive two emails: one from your agency and one from CentralSquare Payments.

Cart History

Use the **Cart History** page to view all receipts generated by eTRAKiT and over-the-counter (OTC) payments, even if the payment was not completed. For over-the-counter transactions, this listing includes subfees.

Use the **Filter By** fields to select specific criteria such as activity number or receipt number, or sent date. After you select the search criteria, select **GO**.

The **Transaction History** pane displays all transactions that meet your search criteria. The listing includes the following details for each transaction:

- **Receipt Number**: Unique receipt number. Use the receipt number to cross-reference receipts with your payment processor history.
- **Status**: Status of the transaction. The values are:
  - **Sent**: The payment was initiated but the application has not received a response from the payment processor.
  - **ReturnedFailure**: The payment was not processed due to bad data, server timeout, or other issue.
  - **ReturnedSuccess**: Your payment processor processed the transaction successfully.
  - **CompletedInTrakit**: Payment is complete and posted in Community Development.
- **Sent Time**: Date and time the transaction was submitted.

Select a receipt in the listing to see additional information about that transaction. When you select an item in the transaction history listing, the **Fee History** pane appears and includes the following details:

- **Group Name**: Type of record (for example, permit or license).
- **Activity ID**: Record number.
- **Type**: Activity record type (for example, permit type or license type).

- **Subtype**: Activity record subtype (for example, permit subtype or license subtype).
- **Cart ID**: Unique identifier generated by the application for the payment transaction.
- **Fee ID**: Unique identifier generated by the application for this fee on this record.
- **Fee Code**: Community Development fee code.
- **Amount Selected**: Fee amount. Trailing zeros are omitted.

For subfees, the following details also appear:

- **SubFee ID**: Unique identifier generated by the application for this fee on this record.
- **SubFee Code**: Community Development subfee code.
- **Amount Selected**: Selected subfee amount. Trailing zeros are omitted.

Custom Theme Editor

The eTRAKiT Custom Theme Editor enables you to customize the look of your eTRAKiT website by defining the logos, colors, and fonts you want to use.

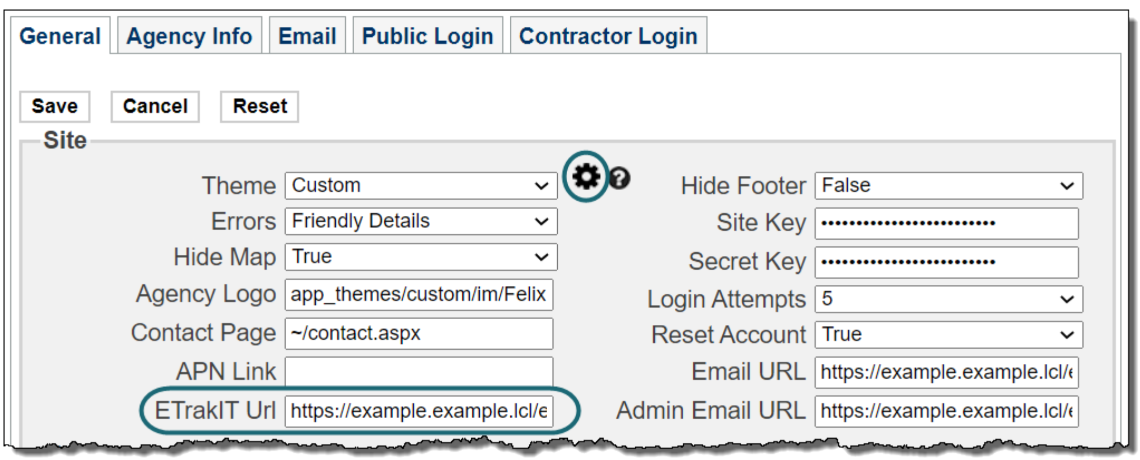
Note: Changes you make through the custom theme editor or the cascading style sheets (CSS) might impact the accessibility of your sites. You should ensure those changes adhere to the WCAG to maintain compliance.

To use the Custom Theme Editor rather than a predefined theme, complete the following steps:

1. Log in to eTRAKiT Administrator.
2. On the **Navigate** menu, select **General**.
3. On the **General** tab, in the **Theme** field, select **Custom**.
4. Select **Save**.

   Tip: Always select **Save** after changing the **Theme** field. This ensures that options related to the selected theme are available to you. The Custom Theme Editor icons appear only after you select **Save**.

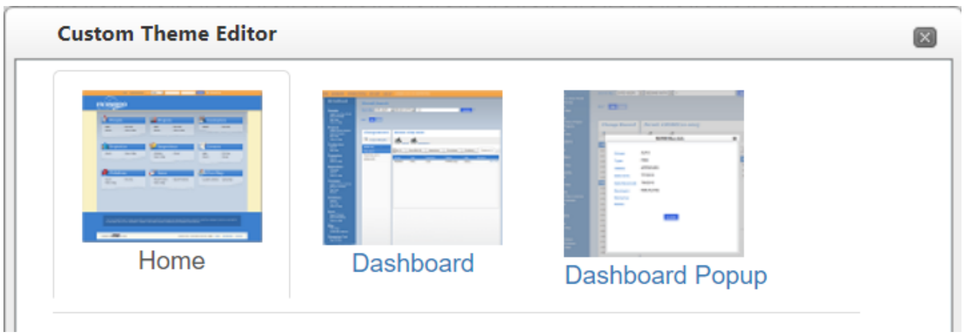
   Tip: If you use a custom theme, the ETrakIT Url field is required.



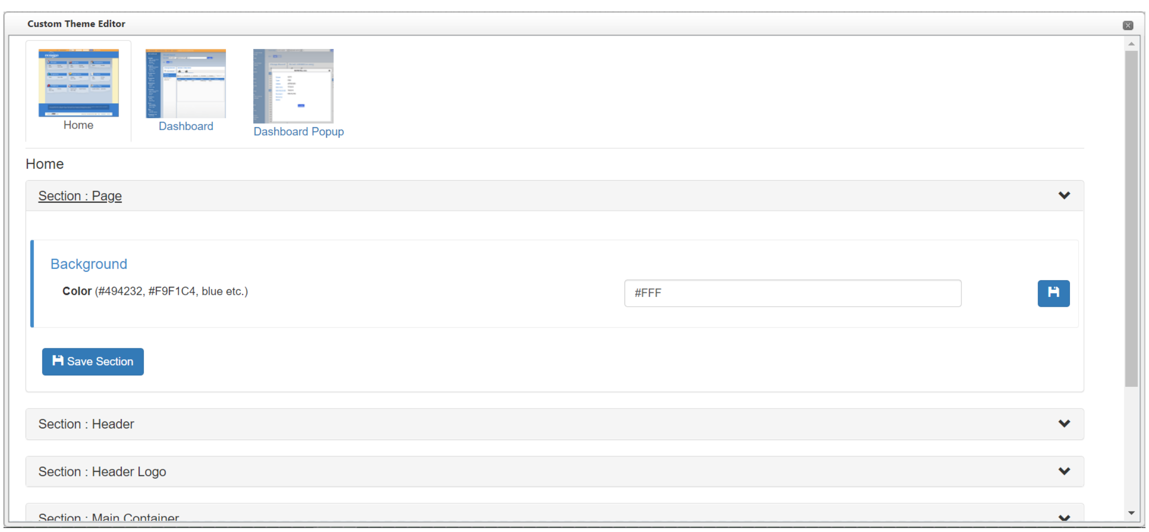
Tabs

Custom Theme Editor contains tabs for each section of your eTRAKiT website:

- Use the **Home** tab to customize the home page of your eTRAKiT website.
- Use the **Dashboard** tab to customize web pages that appear after a user selects a menu option on the home page.
- Use the **Dashboard Popup** tab to customize pop-up windows that open from the dashboard.



Each tab contains sections that correspond to specific areas of the selected home page, dashboard, or dashboard pop-up display. For example, the **Home** tab contains sections for the header, header logo, footer, and more. In each section, type values in the available fields. Select to save changes for a specific field or select **Save Section** to save changes to multiple fields within a section.



Field values

Field values must be entered in HTML format.

- For color fields, type a color name (such as **red**), RGB values with no spaces (such as **212,9,4**), or a hexadecimal color code (such as **#d40904**).
- For background color fields, type a color name (such as **red**), RGB values (such as **212,9,4**), or a hexadecimal color code (such as **#d40904**).
- For font name fields, type the name of the font (such as **Calibri**).
- For font size fields, type a numerical value and unit of measure, with no spaces (for example, **10px**). Typically, pixels (px) are used, but other HTML units are also valid.
- For visibility fields, type **Hidden** to hide an element or **Visible** to display the element. This setting is used for the tear-off edge effect on menus.

Home

The following sections are available for customization of the home page:

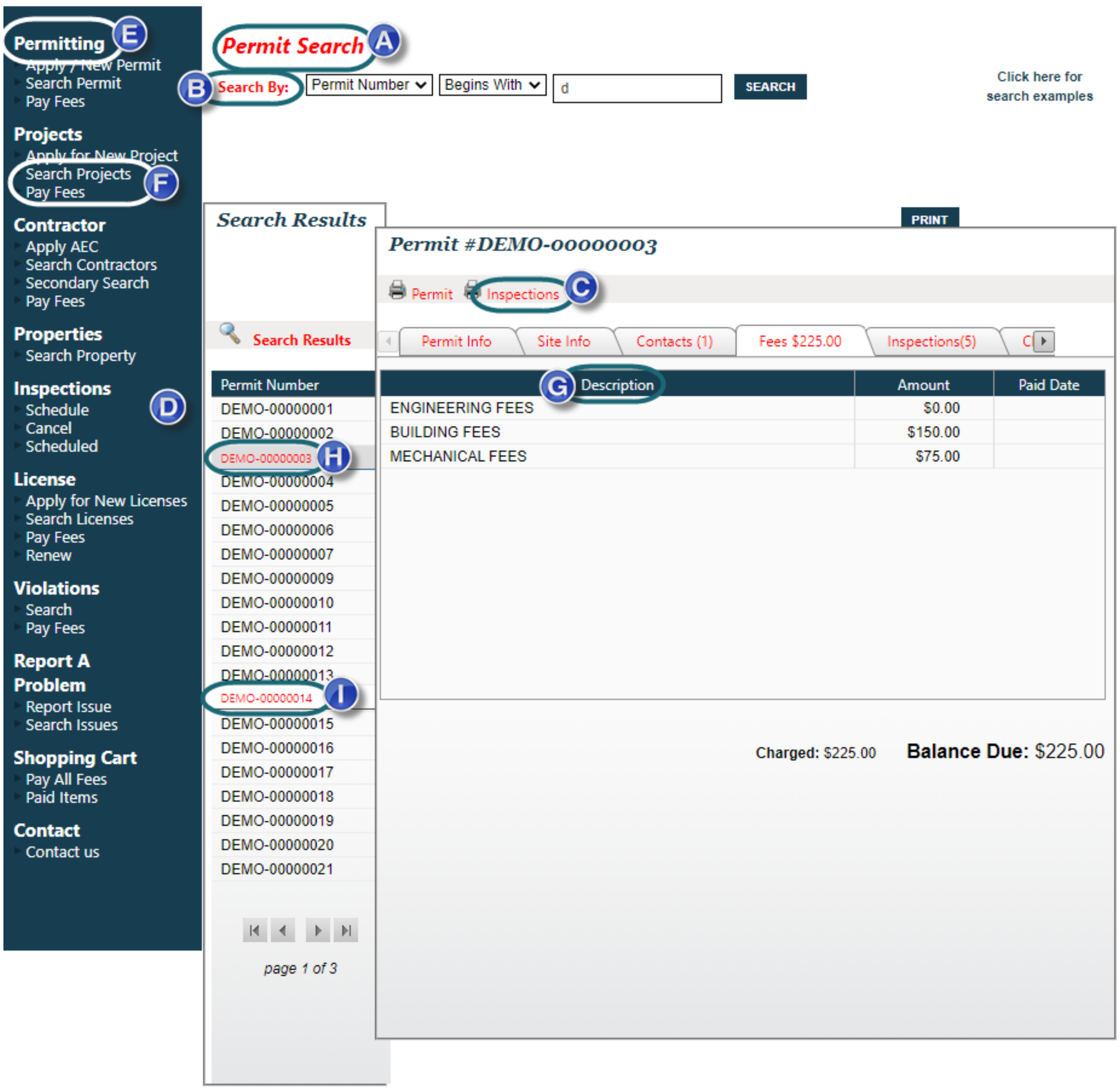
	Section	Element	Description
1	**Page** (not shown in image)	**Background**	Background color of the pages and windows, including dashboard pop-up windows.

	Section	Element	Description
2	**Header**	**Color**	Background color of the header.
3		**Link**	Font color, font family, and font size of links in the header.
4		**Label**	Font color, font family, and font size of labels in the header.
5		**Button**	Background color, font color, font family, and font size of buttons in the header.
6	**Header Logo**	**Upload**	Banner image or main logo.
7		**Color**	Background color of the header logo area.
8	**Main Container**	**Background**	Color of the main page, which is the area between the header and footer.
9		**Foreground**	Color of the menu area on the main page.
10	**Activity**	**Effect**	Tear-off style (visible or hidden) of menus on the main page.
11		**Menu Title**	Background color, font color, font family, and font size of menu titles.
12		**Sub-menu**	Font color, font family, and font size of the options on each menu.
13	**Footer**	**Background**	Background color of the footer area.
14		**Powered-By and Address Container**	Background color of the powered-by and address area.
15		**Address**	Font color, font family, and font size of the address in the footer.
16		**Links**	Font color, font family, and font size of links in the powered-by and address area.
17	**Disclaimer** (not shown in image)	**Background**	Background color of the disclaimer.

	Section	Element	Description
			Note: Define the disclaimer text and text format in eTRAKiT Administrator > **General** preferences > **General** > **Site** > **Footer**.

Dashboard

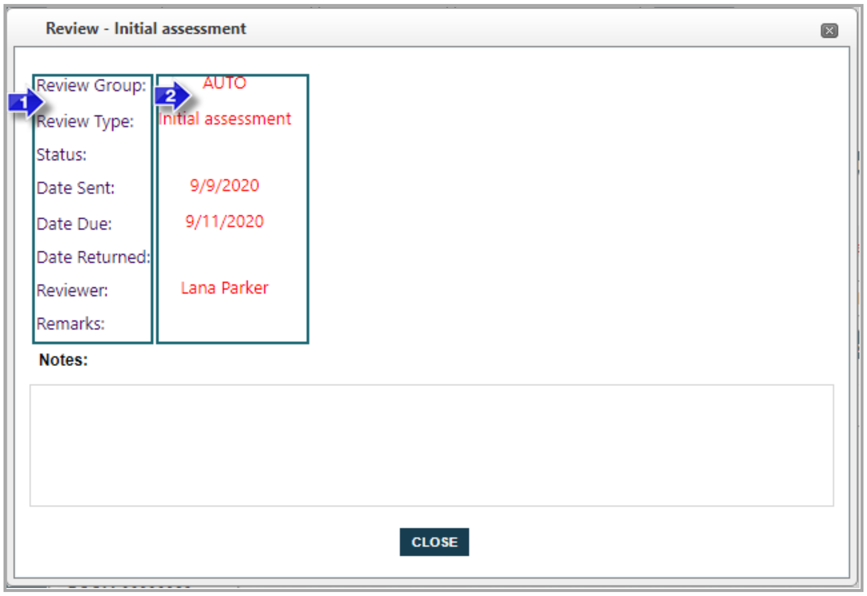
The following sections are available for customization of the dashboard:



	Section	Element	Description
A	**Page**	**Header**	Font color, font family, and font size of page title.
B		**Sub-text**	Font color, font family, and font size of page subheader, subtext, or field labels.
C		**Links**	Font color, font family, and font size of links.
D	**Side**	**Background**	Background color in the side navigation bar.
E		**Menu Title**	Font color, font family, and font size of menu titles in the side navigation bar.
F		**Sub-Menu Link**	Font color, font family, and font size of menu links in the side navigation bar.
G	**Grid**	**Column Header**	Font color, font family, and font size of grid column heading text.
H		**Row Selection**	Background color, font color, and font family of a grid row that is selected.
I		**Row Hover**	Background color, font color, and font family of a grid row when the user pauses the mouse over the row.

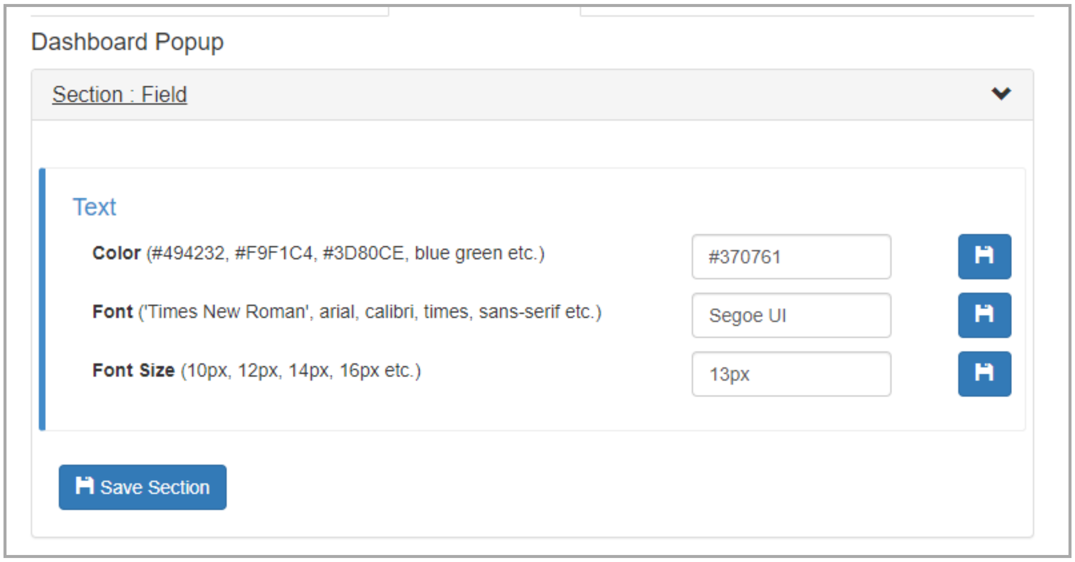
Dashboard Pop-up

The following sections are available for customization of dashboard pop-up windows. These windows appear when you select a link in a record from the dashboard (for example, when you select the **More Info** link on the **Permit** > **Reviews** tab).



	Section	Element	Description
1	**Field**	**Text**	Font color, font family, and font size of field labels.
2	**Value**	**Text**	Font color, font family, and font size of value text.

Example entries for the dashboard pop-up **Field** section (1) are as follows:



eTRAKiT Administrator questions

How do I add instruction documents for permit types?

1. Create a folder called **Custom** in the eTRAKiT folder on the server.
2. Place PDF files, named exactly the same as the respective permit type, in the **Custom** folder. When the names match, the documents will link. (For example, a document titled **plumbing.pdf** links with a permit type of **plumbing**.)
3. In eTRAKiT Administrator, go to **Permitting** > **Application** > **Custom**.
4. Verify the **Instructions Path** field is correct.
5. When applying for that specific permit type, a hyperlink appears. The user can select the link to view the linked document.

How do I restrict the type of attachments uploaded?

1. Log in to eTRAKiT Administrator.
2. Go to **General** > **General**.
3. In the **Attachments** pane, in the **Types** field, select the types of attachments that are allowed. Hold down the Ctrl key to select multiple choices.
4. Select **Save**.

If an applicant tries to upload a type of file that is not supported, the message “This attachment type is not supported” appears.

For more information about other options in the **Attachments** pane, see Attachments (page 8). For general information about attachments, see Attachments overview (page 75).

Attachments overview

eTRAKiT offers the following features related to attachments:

- You can choose whether to allow registered users to upload attachments related to their permits, projects, licenses, entity record, code cases, and CRM entries.
- If you allow attachments to be uploaded through eTRAKiT, you can choose the type of attachments that you allow. For details about allowing attachment types, see How do I restrict the type of attachments uploaded? (page 1).
- If you allow attachments to be uploaded through eTRAKiT, you must set additional attachment options by module. Additional options include security and notification settings.

Allow users to upload attachments

1. For each module, go to the module's preferences. For example, from the menu, select **Permitting**.
2. On the **General** tab, go to the **Attachments** pane. (For CRM, select the **CRM Entry** tab and then go to the **Attachments** pane.)
3. To allow registered users to upload attachments, set the **Upload** field to **True**. If you do not want registered users to upload attachments, select **False**.

   If you select **True**, additional attachment options are available. These options vary by module.

Naming restrictions

Certain characters are restricted from being used in file names and file descriptions.

When attachments are uploaded in Community Development or eTRAKiT, the following restrictions apply:

- **File names**: File names that contain the following characters are changed during the upload to replace the restricted character with an underscore:
  / \ : * ? "" < > | & # + ' % $!
- **File descriptions**: If a file's description contains a slash (/), backslash (\) pound sign (#), or apostrophe ('), those characters are removed.
- **Non-ASCII characters**: Non-ASCII characters are removed from both file names and file descriptions. Examples of non-ASCII characters include é, €, or ∆.

Examples:

Type	Original	Changed to...
File name	**Joe Smith:license & ID**	**Joe Smith_license _ ID**
	José Smith's blueprints	**Jos Smith_s blueprints**
File description	**Verdant Lawns:license/ID**	**Verdant Lawns:licenseID**
	Joe Smith's blueprints	**Joe Smiths blueprints**
	José Smith's blueprints	**Jos Smiths blueprints**

How do I set required user-defined fields (UDFs)?

1. Log in to eTRAKiT Administrator.
2. Go to **Permitting** > **Application**.

3. In the **Display** section, set the **Show More Info** field to **True**.
4. Select **Set Required Fields**.
5. In the pop-up window, select a permit type using the drop-down menu. (The list of available UDF fields appears.)
6. Select options in **Select Fields**. (Hold down the Ctrl key to select multiple choices.)
7. Select **Save and Close**.

After you save, when users apply for a permit in eTRAKiT, those fields are required (indicated by * next to the field label) in the **Additional Information** section of the **Permitting** preferences > **Application** tab.

How do I set up multistep verification?

1. Log in to eTRAKiT Administrator.
2. Go to **General** preferences
3. Select the **Email** tab. Verify the entries in the **Server Name** and **Server Port** fields.
4. Select the **Public Login** tab.
5. In the **Login** section, verify that the **Verification** field is **Enabled**.
6. Select **Save**.
7. Test the verification process by registering as a public user. After receiving the confirmation email, select the embedded hyperlink to activate the account and log in.

How do I configure online payments?

1. Log in to eTRAKiT Administrator.
2. Set up Applications/Online Payments. For more information, see Applications/Online Payments (page 3).
3. Enable payments in the **Online** field (to allow online payments) and **Security** field (to set the online payment security).
4. Configure **Shopping Cart**. For more information, see Cart (page 63) and related topics.
5. Log in to WUM to set up the following features:
    - Receipt Numbers. For more information, see How do I configure receipt numbers for online payments? (page 79)
    - Online Applications. For more information, see How do I configure online permit and project applications? (page 79)

Community Development WUM preferences

Module Configuration

eTRAKiT custom field tooltips for permits, projects, and licenses offer enhanced text display options for providing additional user help.

1. Log in to WUM as a system administrator.
2. Select **Module Configuration**, then the module, then **Types**, then a specific license type, then **Custom Screens**, and then select the custom screen you want to edit.

   Example: Module Configuration > **Licensing** > **License Types** > **Business License** > **Custom Screens** > **Insurance**
3. Edit tooltips by selecting ✎. The tooltip icon appears on the eTRAKiT page.

Community Development WUM questions

How do I configure receipt numbers for online payments?

1. Select **System Settings** > **System Settings** > **AutoGen Numbers**.
2. Add a new line and name the receipt number **eTRAKiT_Receipt**. Enter a specified prefix, such as **WEB** or **ONLINE** or **ONL**.
3. Fully enable online payment receipts by verifying that the:
   - AutoGen receipt name is also entered in eTRAKiT Administrator **Shopping Cart** > **Payment** > **AutoGen Receipt** field.
   - New permit prefix is also entered in eTRAKiT Administrator > **Permitting** > **Application** > **Custom** > **New Prefix** field.

How do I configure online permit and project applications?

1. Go to **Module Configuration** > **Permitting** > **Permit Types** > **Type List**.
2. In the **eTRAKiT** column, select the check box for each permit type to be accepted online.
3. Select **Save**. The corresponding **Acct #** field shows **eTRAKiT** as confirmation.
4. Go to **Module Configuration** > **Projects and Planning** > **Project Types** > **Type List**.
5. In the **eTRAKiT** column, select the check box for each project type to be accepted online.
6. Select **Save**. The corresponding **Acct #** field shows **eTRAKiT** as confirmation.

Note: **Shopping Cart** preferences, **Permitting** > **Application** preferences, and **Projects and Planning** > **Application** preferences must be configured in eTRAKiT Administrator before online applications can be accepted.

Important: User privileges must also be configured for online applications to be accessible. For details, refer to the *Community Development WUM guide*, “User Administration.”

How do I define online inspections by permit type?

1. Add eTRAKiT inspection options for each permit type:
   a. Go to **Module Configuration** > **Permitting** > **Inspections** > **Preferences** > **Preferences**.
   b. Select the **Show eTRAKiT inspection request types in Permits Type Definitions** check box.
   c. Select **Save**.

2. Activate eTRAKiT inspections for each permit type.
   a. Go to **Module Configuration** > **Permitting** > **Permit Types**.
   b. Select a permit type.
   c. Select **eTRAKiT Inspections**.
   d. Drag inspections from the **MASTER Inspection List** (left pane) to the **eTRAKiT Inspections** list (right pane).
   e. Repeat steps a–d for each permit type where online inspection requests will be allowed.
   f. Select **Save**.

Community Development database settings questions

How do I enable contractor web access?

To access eTRAKiT, all contractors must first have a record and PIN or password created in Entity Management by your agency.

1. Log in to Community Development and then select the Entity Management module.
2. Add a contractor record by selecting **Add Record** from the functions menu of a current record.

   If a contractor record already exists, go to the record. Skip step 3 and continue with step 4.
3. Complete the following fields:
   a. Select **New AEC Record** from the drop-down menu.
   b. Select the record type from the drop-down menu.
   c. Select the record subtype from the drop-down menu.
   d. Select the **Numbering** option, typically **Automatic**.
   e. Enter the company name in the field.
   f. Select **Add**.
4. In the main information pane for the new record, select the **Edit** button to edit the Entity Management record:
   a. In the **IVR PIN #** field, type a number (9 digits maximum).
   b. Select **Save**.

Glossary

A

AEC
architect, engineer, contractor; also known as a contact or entity

API
application programming interface

APN
Assessor Parcel Number, used by the county tax assessor to identify a parcel of land.

autogen
automatically generated

autogen number
Unique, numerical identifier that is automatically generated for tracking purposes (for example, receipt numbers, permit numbers, citation numbers).

C

Community Development
CentralSquare software application that enhances local government operations by automating permitting, managing inspections, regulating land use, and tracking projects, while providing visibility into status updates and allowing payment processing.

CRM
Citizen Response Management

G

geo
geographic

GIS

geographic information system

I

IVR

interactive voice response

R

REST

representational state transfer

restrictions

Important information (such as whether a property is in a flood zone, on a fault line, or in a historical district) that can affect requirements for fees, inspections, or other activities.

result an inspection

Assign a status (result) to the inspection and add details about the inspection.

S

standard notes

Predefined list of frequently used comments for inspections and reviews that can speed up data entry. Standard notes are configured in the Reviews and Inspections control tables and used in the Notes function for reviews and inspections in Community Development applications.

standard remarks

List of standard comments from which a user can select one when batch-scheduling reviews or inspections. They are configured in the Reviews and Inspections control tables.

T

trust account

Deposited funds that are held by the agency on behalf of someone doing business with the agency (for example, a contractor). The depositor can draw on these funds to pay fees assessed on activities in the Permitting, Projects and Planning, Code Compliance, Licensing, and Entity Management modules.

U

UDF

user-defined field

W

WUM

Web Utilities & Maintenance