



Cloud based Plan Review, Permitting and Inspections

Feature List

Version 3.0

January 2015

SAGESNETWORKS

Table of Contents

Configuration	3
Application Submittal, Resubmittals, Intake & Routing	5
Common Project Features	6
Electronic Plan Review	7
Permitting.....	7
Inspections.....	8
Fees.....	9
Certificates.....	10
Citations.....	11
Notices.....	11
Licenses.....	11
Meetings	12
Tasks	12
Reports	13
Work Queue, Alerts & Project Details.....	14
Search	14
GIS	14
Scheduler.....	14

Configuration

Feature	Description
My Profile	Ability to change contact phone number and email address. Ability to change password.
Jurisdiction Profile	Ability to change Jurisdiction contact phone number, address and footer message. Ability to upload Jurisdiction logo used by system. Ability to upload Approval stamp used for Electronic Plan Review. Ability to specify Arc GIS ID used to load maps tab for Jurisdiction. Ability to enable Forte Payment Gateway for Jurisdiction.
User & Role Management	Add / Modify users. Ability to modify contact information for a user. Ability to specify roles for a user. Add / Modify roles in the system (unlimited). Specify actions allowed for every role.
Business Processes	Add / Modify business processes or workflows (unlimited). Ability to define sequential and parallel workflows. Support multiple versions of workflows. Ability to group business processes. Ability to specify if Intake is required or not for a business process. Ability to control routing before or after fee collection. Ability to define the format for numbering the Project or Case number. Ability to define position business process on the Home page. Ability to make a process Active or Inactive. Ability to Publish a workflow when it is ready for use. Ability to Un-publish a workflow to allow modifications to the process definition. Add/ Modify steps for Fees, Review, Permit, Inspection, Certificate, Meeting, License, Citation, Notice and Task within a business process (unlimited). Ability to re-arrange and move steps within a business process. Ability to Add steps before or after each step in the business process. Ability to delete a step within a business process. Add / Modify items (Permit type, Inspection type, Fee type etc.) within a step (unlimited). Ability to specify if an item within a step is selected by default. Ability to specify parent relationships for Inspections and Fee. Ability to issue Permits, Licenses, Citations & Notices on application submission. Add / Modify Business Rules for each item within a step (unlimited). Ability to specify business rule checks before and / or after an action is performed in the system. Ability to specify an action that triggers a business rule. Ability to specify the target step, object and status that the system must check before an action is performed. Ability to provide custom description for business rule.
Process Group	Ability to define a Process group for visually grouping business processes on the Home page. Ability to indicate if a process group is Active or Inactive. Ability to set the position of the process group on the Home page.
Access Requests	Manage Access Requests to the system by Companies and Individual Users. Ability to Approve, Disapprove or Hold an access request.
Alerts	Add / Modify Alerts in the system. Ability to define an alert for a specific process business process type (Ex. Permits, Inspections, and Fees etc.). Ability to specify a trigger action when the alert must be triggered. Ability to define a description text for the alert which can consist of field from the application form, project or common section of the business process. Ability to specify if the customer and / or coordinator can see an alert.

	Ability to indicate if an alert is active or inactive.
Announcements	Ability to Add / Modify announcements for a Jurisdiction. These announcements are displayed on the Home page. Ability to specify a heading for the announcement. Ability to define the body of the announcement using a rich text editor.
Email Template	Add / Modify Email templates for a Jurisdiction (unlimited). Ability to specify source for email (Ex. Project, Permit, Inspection etc.). Ability to specify trigger action for an inspection. (Ex. Approved, Disapproved etc.). Ability to define a subject for the email using a combination of text and fields from the application form, project, source of the email or common section of the business process. Ability to specify the role of the email recipient (Ex. Assigned Staff User, Applicant, General Contractor etc.). Ability to specify additional recipients for an email. Ability to specify if the application form or any generated documents (Ex Issued Permits, Inspections report etc.) must go out with this email as an attachment. Ability to specify the Email template is active or inactive. Ability to define the content of the email using a rich text editor. Ability to insert dynamic fields in the content of an email. Ability to select a container for the dynamic field from the application form, project, source of the email or common section of the business process. Ability to select the property or field within the container to place inside the email (Ex. Project >Name etc.).
Holidays	Add / Modify Holidays for a jurisdiction.
Project / Case Archival Rules	Add / Modify Project or Case Archival rules (unlimited). Ability to define a rule to archive Projects that are Abandoned after a certain number of days. Ability to define a rule to archive Projects that are Completed after a certain number of days. Ability to define a rule to archive Projects that are Withdrawn after a certain number of days. Ability to indicate if a rule is Active or Inactive.
Agencies / Department	Add / Modify Agencies or Departments (unlimited). Ability to specify the name, position and if the agency is active or inactive.
Business Data	Add / Modify Business data fields (unlimited). Ability to specify if a business data field is a contact or license holder type of field. Ability to specify business relation (Ex. Architect, Contractor etc.) Ability to indicate if the business data field is active or inactive.
Chart of Accounts	Add / Modify Chart of Accounts (unlimited). Ability to specify the following for an account: Account Number, Account Code, Account Name and position. Ability to specify if the Account Type is of the following types: Accounts Receivable, Accounts Payable, Revenue, Expense, View or Other. Ability to indicate if an account has a parent account.
File Types	Add / Modify File Types that are allowed during submission (unlimited). Ability to specify a file type name, position and if the file type is active or inactive.
Hold Types	Add / Modify Hold Types that are allowed during submission (unlimited). Ability to specify a hold type name, position and if the hold type is active or inactive.
Utilities - Gas	Add / Modify Gas Utility companies (unlimited). Ability to specify the following for a Gas Utility company: Company Name, Address, City, State, Zip code, Phone and Fax numbers. Ability to specify position and indicate of the utility is active or inactive.
Utilities - Power	Add / Modify Power Utility companies (unlimited). Ability to specify the following for a Power Utility company: Company Name, Address, City, State, Zip code, Phone and Fax numbers. Ability to specify position and indicate of the utility is active or inactive.
Hold Reasons	Add / Modify / Delete Hold Reasons (unlimited). Ability to define multiple levels of folders for hold reasons. Ability to Add / Modify / Delete hold reasons in these folders.

	Ability to specify the following for each hold reason: Heading Text and Suggested Text.
Zone	Add / Modify Zones that can be used as Zones for a property. Ability to specify position and indicate if a zone is active or inactive.
Property Attribute	Add / Modify Properties that can be used as custom attributes for a property. Ability to specify position and indicate if a property is active or inactive.
Structure Attribute	Add / Modify Structures that can be used as custom attributes for a property. Ability to specify position and indicate if a structure is active or inactive.
Property	Add / Modify Properties (unlimited). Ability to specify the following key fields for a property: Parcel Number, Lot Number, Block Number and Property Address. Ability to specify standard attributes such as acreage, land use, parking, township census information, planning district and much more for the Property. Ability to add custom attributes for a property from a list of custom property attributes. Ability to add zones from a list of zones. Ability to specify if a property has a parent property. Ability to add notes to the property.
Structure	Add / Modify Structures (unlimited). Ability to add structures for a property. Ability to specify the Structure Address. Ability to specify standard attributes such as building number, occupancy type, construction type, unit type, built year and much more for a Structure. Ability to add custom attributes for a structure from a list of custom structure attributes.

Application Submittal, Resubmittals, Intake & Routing

Feature	Description
General	Application can be submitted by both external users and staff users. Application can be submitted only on process types that are published. Ability to support resubmittals of projects for multiple review cycles. Ability to use the same Application form across different business processes.
Build Application Forms	Add / Modify an application form each business process. Ability to define application forms to match current paper or PDF application forms. Ability to Add / Modify fields on the application forms. Ability to define the following field types Text fields, Password fields, Email fields, Search fields, Telephone Number fields, URL fields. Ability to specify Name, Value, Character Width, Maximum characters for a field. Ability to switch from form view to HTML view for easy editing of forms. Ability to have a rich text user interface or form definition. Ability to define Text boxes, Radio buttons and dropdown lists on forms. Ability to define business data entry fields on forms Ability to define a required field validator custom validators for a field. Ability to define a data type field validator for a field.
Prerequisites checklist (for business process)	Ability to add prerequisite checklists to a business process. Ability to define acceptable answers for checklist items. Ability to specify default selection for a check list item.
Prerequisite Checklist (Common)	Ability to add prerequisite checklists that are common for all business processes. Ability to define acceptable answers for checklist items. Ability to specify default selection for a check list item.
File Requirements	Ability to specify file type requirements for a business process from a list of file types. Ability to specify if a file type can be Mandatory Optional or No Applicable. Ability to add optional help text for a file type.
Submittal & Resubmittal	
Step1: Complete Prerequisite	Prerequisite checklist must be completed to proceed with the application. Prerequisite checklist items can be defined at for business process or common for all applications. Prerequisites are

Checklist	defined in the Administration tool.
Step2: Fill the Form	Ability to submit custom application defined for a business process. Custom application forms are defined in the Administration tool. Ability to specify the address for the project. Ability to specify for whom the application is being submitted.
Step 3: Upload Files	Ability to upload drawing files and other supporting documents. Ability to validate if applicant has uploaded required files and supporting documents for that application. The rules for a type of file being required or optional are defined in the Administration tool. Ability to replace drawing files with newer versions during resubmittal across review cycles. Ability to upload any type of file (PDF, Word, Tiff, Excel etc.). Note: For Electronic Plan Review using SagesGov & Bluebeam we recommend PDF drawing files only.
Step 4: Confirm and Submit	Ability to go back and change any of the above information. Ability to add additional comments before submission.
Pay Fees (optional)	Ability to collect and processes fees during submission.
Intake & Routing	
Perform Intake	Ability to Accept or Reject Intake for any project or case. Ability to specify project / case coordinator. Ability to specify if routing must happen only after fee collection. Ability to complete Intake check lists. Ability to determine the routing by choosing the setups for the project or case. Ability to view a GIS map of the project address. Ability to view files if any, uploaded by the applicant. Ability to view the latest history of the project. Ability to Edit the Application form. Ability to Assign a project Coordinator. Ability to Abandon a project or case. Ability to Enter a Comment during Intake.
Intake Checklist (for business process)	Ability to add Intake checklists to a business process. Ability to define acceptable answers for checklist items. Ability to specify default selection for a check list item.
Intake Checklist (Common)	Ability to add intake checklists that are common for all business processes. Ability to define acceptable answers for checklist items. Ability to specify default selection for a check list item.

Common Project Features

Feature	Description
General	Features are available for all Projects - staff users only Ability to View application form submitted. Ability to Edit the Application form submitted. Ability to Assign a coordinator for the project. Ability to Manage Properties or Structures for the project. Ability to Submit Files for the project. Ability to upload Supporting Documents for the project. Ability to Abandon project Ability to Complete project. Ability to Place Hold on a project. Ability to Modify Hold on a project. Ability to Release Hold on project. Ability to view a GIS map of the project address. Ability to view files if any, uploaded by the applicant. Ability to view the latest history of the project.

Electronic Plan Review

Feature	Description
General	<p>Ability to Approve Review cycle.</p> <p>Ability to support multiple review cycles (unlimited)</p> <p>Ability to Perform Review and Enter Result</p>
Review Types	<p>Add / Modify Reviews Types (unlimited).</p> <p>Ability to specify a name for the review.</p> <p>Ability to specify a review agency that a review belongs to.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the review is active or inactive.</p> <p>Ability to define the content of the review using a rich text editor.</p> <p>Ability to insert dynamic fields in the content of a review.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the review or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the review (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the review.</p> <p>Ability to specify an expiry date for a review.</p>
Review Checklist (Common)	<p>Ability to add review checklists that are common for all business processes.</p> <p>Ability to define acceptable answers for checklist items.</p> <p>Ability to specify default selection for a check list item.</p>
Perform Review and Enter Result	<p>Ability to specify if a Review is Approved, Disapproved, Not-Applicable or Approved As Noted.</p> <p>Ability to specify the Review Time in hours and minutes.</p> <p>Ability to enter Comments for the review.</p> <p>Ability to complete Review Checklist.</p> <p>Ability to download Review Package for Electronic Plan Review using Bluebeam.</p>
Electronic Plan Review using SagesGov and Bluebeam	<p>Ability to markup, redline and enter comments on the drawing.</p> <p>Ability to save markups and comments on both drawing file and in the system database.</p> <p>Ability to perform review and enter comments in parallel with other reviewers.</p> <p>Ability to calibrate drawing sheets and perform measurements on drawings.</p> <p>Ability to visually overlay two versions of the same drawing.</p> <p>Ability to compare two versions of the same drawing side-by-side and determine sections that were modified across review cycles.</p> <p>Ability to select from markup tools such as text, notes, lines, clouds, stamps, images and more.</p> <p>Ability to drag a document or feature tab to another monitor to maximize viewing space.</p> <p>Ability to use Tool chest and Markup Lists for improved annotations and markups.</p> <p>Ability to apply different colors to two or more different PDFs using Overlay Pages.</p> <p>Ability to count and measure, length, area, volume, perimeter, angle and radius.</p>

Permitting

Feature	Description
General	<p>Ability to upload Supporting Documents for the permit.</p> <p>Ability to Place Hold on a permit.</p> <p>Ability to Modify Hold on a permit.</p> <p>Ability to Release Hold on permit.</p>
Permit Types	<p>Add / Modify Permits Types (unlimited).</p> <p>Ability to specify a name for the permit.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the permit is active or inactive.</p> <p>Ability to define the content of the permit using a rich text editor.</p>

	<p>Ability to insert dynamic fields in the content of a permit.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the permit or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the permit (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the permit.</p> <p>Ability to specify an expiry date for a permit.</p> <p>Ability to Download the permit issued in PDF format.</p>
Permit Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Issue a permit.</p> <p>Ability to load a permit document from a permit template before issuing.</p> <p>Ability to load dynamic fields in the permit template with data.</p> <p>Ability to modify permit before issuing.</p> <p>Ability to mark a permit as no applicable.</p> <p>Ability to Cancel a permit before and after permit issuance.</p> <p>Ability to Reopen a permit after Issue, Cancel or Mark as not applicable.</p> <p>Ability to Close a permit after permit issuance.</p> <p>Ability to Expire a permit after permit issuance.</p> <p>Ability to Revoke a permit after permit issuance.</p> <p>Ability to Set Expiration Date for permit.</p>

Inspections

Feature	Description
General	<p>Ability to upload Supporting Documents for the inspection.</p> <p>Ability to Place Hold on an inspection.</p> <p>Ability to Modify Hold on an inspection.</p> <p>Ability to Release Hold on inspection.</p>
Inspection Types	<p>Add / Modify Inspections (unlimited).</p> <p>Ability to specify a name for the inspection.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the inspection is active or inactive.</p> <p>Ability to set an icon for the inspection.</p> <p>Ability to specify if an inspection is a recurring inspection.</p> <p>For recurring inspections, ability to define the pattern of recurrence: Daily, Weekly, Monthly or Yearly similar to a calendar.</p>
Predefined Comments	<p>Add / Modify / Delete Predefined Comments (unlimited).</p> <p>Ability to define multiple levels of folders for comments.</p> <p>Ability to Add / Modify / Delete comments in these folders.</p> <p>Ability to specify the following for each comment: Heading Text, Code section being referenced, Suggested Text and Code Description.</p>
Inspections Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Schedule an inspection. Available to both external and staff users.</p> <p>Ability to Reschedule an inspection.</p> <p>Ability to Assign an inspection.</p> <p>Ability to specify / change Parent permit for an inspection.</p> <p>Ability to Enter the following results for an inspection: Approved, Disapproved, No-Applicable, Approved As Noted or Completed.</p> <p>Ability to enter predefined comments for an inspection.</p> <p>Ability to enter Comments in free text for an inspection.</p> <p>Ability to Reopen inspection after result has been entered.</p> <p>Ability to Add Inspections</p>

Inspector Workload Management	<p>Ability to Manage inspector workloads.</p> <p>Ability to display all inspections assigned to inspectors.</p> <p>Ability to control the display to next working day or the next 2,3,4,5 days.</p> <p>Ability to view and select inspections for a specific inspector.</p> <p>Ability to assign selected inspections to other inspectors based on workload.</p>
Inspection Scheduling Rules	<p>Add / Modify Scheduling rules (unlimited).</p> <p>Ability to define different rules for staff user and customer.</p> <p>Ability to define rules for a specific business processes (Ex. Residential Permits etc.).</p> <p>Ability to define assignment by an object type and sub type (Ex. Inspection > Building-Framing).</p> <p>Ability to specify the type of day to execute the rule (Ex. Weekday, weekend etc.).</p> <p>Ability to specify minimum days required between inspection request date and inspection date.</p> <p>Ability to specify cut off time for inspection requests (Ex. Inspections cannot be scheduled after 2:00pm for the same day).</p> <p>Ability to set maximum days in future inspections can be scheduled (Ex. 90 days).</p>
Assignment Rules	<p>Ability to Add / Modify / Delete Assignment Rules.</p> <p>Ability to define assignment rules by Geographic area.</p> <p>Ability to define assignment rules by business process type</p> <p>Ability to define assignment by an object type and sub type (Ex. Inspection > Building-Framing)</p> <p>Ability to indicate the position of a business rule to indicate the precedence of a rule.</p> <p>Ability to specify user for whom this transaction must be assigned.</p>
Mobile Inspections	<p>Mobile application available on Apple iOS and Android platforms.</p> <p>Mobile application has local database on device and works in online and offline mode.</p> <p>Mobile application has feature that synchronizes the data on the mobile device with the main database automatically.</p> <p>Ability to manually Sync inspections on demand.</p> <p>Mobile Sync brings latest information about the status of inspections to the mobile device.</p> <p>Ability to access new Inspections in the Inbox folder.</p> <p>Ability to access completed and not synced inspections in the Outbox folder.</p> <p>Ability to access completed and synced inspection in the Done folder.</p> <p>Ability to view Summary and History information for an Inspection.</p> <p>Ability to view a map of the inspection.</p> <p>Ability to take a picture for an inspection.</p> <p>Ability to capture a signature for an inspection.</p> <p>Ability to click on pre-defined comments for an inspection.</p> <p>Ability to enter a comment for an inspection.</p> <p>Ability to perform following actions on an Inspection record: Approve, Approve As Noted, Disapproved and Completed.</p> <p>Ability to view New and Inspection Alerts.</p> <p>Ability to clear Alerts on Mobile device.</p>

Fees

Feature	Description
General	<p>Ability to upload Supporting Documents for the fee.</p> <p>Ability to Place Hold on a fee.</p> <p>Ability to Modify Hold on a fee.</p> <p>Ability to Release Hold on fee.</p>
Fee Types	<p>Add / Modify Fees (unlimited).</p> <p>Ability to specify a name for the fee.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the fee is active or inactive.</p> <p>Ability to set an icon for the fee.</p> <p>Add / Modify formulas for fees (unlimited).</p> <p>Ability to specify the start and end dates for a fee to be valid.</p>

	<p>Ability to specify complex math formula based on numeric fields on the application form.</p> <p>Ability to filter based on any field on the application form.</p> <p>Ability to associate one or more GL accounts with the with a fee</p> <p>Ability to define the posting method from one of the following: Fixed Amount, By Percentage, Remaining Amount.</p> <p>Ability to specify the Post Value for each posting method (Ex. Post By Percentage 100% to a GL account).</p> <p>Ability to Auto Posting based on the following rules:</p> <p>Percentage postings are calculated on the amount remaining after Fixed Amount postings are processed.</p> <p>Only one rule can be defined using the Remaining Amount method.</p> <p>At least one of the rule must defined using either the Percentage method or Remaining Amount method.</p> <p>Auto posting to GL accounts will not be done if the fee amount is not enough to satisfy all the Fixed Amount rules.</p> <p>Auto posting to GL accounts will not be done if the fee amount cannot be posted completely (i.e. fee amount is more than what rules require).</p> <p>Auto posting may post 0 (zero) amount to GL Accounts.</p>
Fee Actions	<p>Ability to Add news fees to a project.</p> <p>Ability to select multiple fees into a single transaction for processing.</p> <p>Ability to change fee amount.</p> <p>Ability to change parent permit.</p> <p>Ability to waive fee.</p> <p>Ability to mark fee as not applicable.</p> <p>Ability to pay fee at the counter using cash, check or credit card.</p> <p>Ability to pay fee online using the Forte Payment Gateway.</p>

Certificates

Feature	Description
General	<p>Ability to upload Supporting Documents for the certificate.</p> <p>Ability to Place Hold on a certificate.</p> <p>Ability to Modify Hold on a certificate.</p> <p>Ability to Release Hold on certificate.</p>
Certificate Types	<p>Add / Modify Certificates (unlimited).</p> <p>Ability to specify a name for the certificate.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the certificate is active or inactive.</p> <p>Ability to define the content of the certificate using a rich text editor.</p> <p>Ability to insert dynamic fields in the content of a certificate.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the certificate or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the certificate (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the certificate.</p>
Certificate Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Issue a certificate.</p> <p>Ability to load a certificate document from a permit template before issuing.</p> <p>Ability to load dynamic fields in the certificate template with data.</p> <p>Ability to modify certificate before issuing.</p> <p>Ability to mark a certificate as no applicable.</p> <p>Ability to Reopen a certificate after Issue or Mark as not applicable.</p> <p>Ability to Download the certificate issued in PDF format.</p>

Citations

Feature	Description
Citation Types	<p>Add / Modify Citations (unlimited).</p> <p>Ability to specify a name for the citation.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the citation is active or inactive.</p> <p>Ability to define the content of the citation using a rich text editor.</p> <p>Ability to insert dynamic fields in the content of a citation.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the citation or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the citation (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the citation.</p>
Citation Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Issue a citation.</p> <p>Ability to load a citation document from a permit template before issuing.</p> <p>Ability to load dynamic fields in the citation template with data.</p> <p>Ability to modify citation before issuing.</p> <p>Ability to mark a citation as no applicable.</p> <p>Ability to Reopen a citation after Issue or Mark as not applicable.</p> <p>Ability to Download the citation issued in PDF format.</p>

Notices

Feature	Description
Notice Types	<p>Add / Modify Notices (unlimited).</p> <p>Ability to specify a name for the notice.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the notice is active or inactive.</p> <p>Ability to define the content of the notice using a rich text editor.</p> <p>Ability to insert dynamic fields in the content of a notice.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the notice or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the notice (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the notice.</p>
Notice Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Issue a notice.</p> <p>Ability to load a notice document from a permit template before issuing.</p> <p>Ability to load dynamic fields in the notice template with data.</p> <p>Ability to modify notice before issuing.</p> <p>Ability to mark a notice as no applicable.</p> <p>Ability to Reopen a notice after Issue or Mark as not applicable.</p> <p>Ability to Download the notice issued in PDF format.</p>

Licenses

Feature	Description
License Types	<p>Add / Modify License Types (unlimited).</p> <p>Ability to specify a name for the license.</p>

	<p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the license is active or inactive.</p> <p>Ability to define the content of the license using a rich text editor.</p> <p>Ability to insert dynamic fields in the content of a license.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the notice or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the license (Ex. Project >Name etc.).</p> <p>Ability to set an icon for the license.</p>
License Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Issue a license.</p> <p>Ability to load a license document from a permit template before issuing.</p> <p>Ability to load dynamic fields in the license template with data.</p> <p>Ability to modify license before issuing.</p> <p>Ability to mark a license as no applicable.</p> <p>Ability to Reopen a license after Issue or Mark as not applicable.</p> <p>Ability to Download the license issued in PDF format.</p>

Meetings

Feature	Description
Meeting Types	<p>Add / Modify License Types (unlimited).</p> <p>Ability to specify a name for the license.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the license is active or inactive.</p> <p>Ability to set an icon for the meeting.</p>
Meeting Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Update Meeting Info.</p> <p>Ability to Schedule Meeting.</p> <p>Ability to Cancel Meeting.</p> <p>Ability to Mark as Complete.</p> <p>Ability to Mark Meeting as Not Applicable.</p> <p>Ability to upload Supporting Documents.</p> <p>Ability to mark a license as no applicable.</p>

Tasks

Feature	Description
Task Types	<p>Add / Modify Task Types (unlimited).</p> <p>Ability to specify a name for the Task.</p> <p>Ability to specify custom numbering using a number template that can be a combination of text and day, month, month name, year, year 2 digit and next sequence.</p> <p>Ability to specify the position and indicate if the license is active or inactive.</p> <p>Ability to set an icon for the task.</p>
Task Actions	<p>Ability to control these actions based on user role.</p> <p>Ability to Assign a Task.</p> <p>Ability to Set Due Date.</p> <p>Ability to Mark as Complete.</p> <p>Ability to Mark Task as Not Applicable.</p> <p>Ability to upload Supporting Documents.</p>

	<p>Ability to mark a license as no applicable.</p> <p>Ability to Place Hold on a task.</p> <p>Ability to Modify Hold on a task.</p> <p>Ability to Release Hold on task.</p>
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Reports

Feature	Description
Custom / Ad hoc Reports	<p>Add / Modify Custom / Ad hoc Reports (unlimited).</p> <p>Ability to define reports for one of the following Projects, Reviews, Permits, Inspections, Certificates, Citations, Notices, Fees, Licenses, Meetings and Tasks.</p> <p>Ability to select the Action for the Report (Ex. Permit Report > Issued Action).</p> <p>Ability to specify a Report Name and indicate if report Active or Inactive.</p> <p>Ability to specify Report generation frequency (Ex. Daily, Weekly, Monthly etc.)</p> <p>Ability to define a Header template for the Report.</p> <p>Ability to define the content of the Header template using a rich text editor.</p> <p>Ability to define a Record template for repeating sections of the report.</p> <p>Ability to insert dynamic fields in the Record template of the report.</p> <p>Ability to select a container for the dynamic field from the application form, project, source of the notice or common section of the business process.</p> <p>Ability to select the property or field within the container to place inside the Record template (Ex. Project >Name etc.).</p> <p>Add / Modify Filter Criteria for the report (unlimited)</p>
Aggregate Reports	<p>Ability to generate aggregate reports.</p> <p>Ability to generate reports for one of the following Projects, Reviews, Permits, Inspections, Certificates, Citations, Notices, Fees, Licenses, Meetings and Tasks.</p> <p>Ability to generate reports filtering by Year to Day and / or Project Status.</p> <p>Ability to generate reports filtering Quarterly Start and End periods, Monthly Start and End periods and Yearly Start and End periods.</p>
Other Reports	<p>Ability to generate the following canned Property / Structure reports</p> <ul style="list-style-type: none"> • Property Activity Report • Structure Activity Report <p>Ability to generate the following canned Fee reports</p> <ul style="list-style-type: none"> • Payment Receipt Report • General Ledger Summary • Fee Collection Report • Fee Refund Report • Contractor Billing Report • Credit Card Payments by GL Account • Past Due Fee Payment Report <p>Ability to generate the following Permit reports</p> <ul style="list-style-type: none"> • Expiring Permits Report <p>Ability to generate the following Inspection reports</p> <ul style="list-style-type: none"> • Scheduled Inspections Report <p>Ability to generate these other reports</p> <ul style="list-style-type: none"> • Building Permit Statistics Report • Permits Issued by City Report • Utility Connection Report

Work Queue, Alerts & Project Details

Feature	Description
Work Queue Items	<p>Access all Projects in the system from a single location.</p> <p>Ability to filter by the following Projects, Reviews, Permits, Inspections, Certificates, Citations, Notices, Fees, Licenses, Meetings and Tasks.</p> <p>Ability to Filter by the Process Type.</p> <p>Ability to filter by the Status.</p> <p>Ability to filter by the Project / Case Coordinator.</p> <p>Ability to access the Project Details page by a clicking on the Project Number.</p>
Project Details	<p>Access to all information about the project from a single page.</p> <p>View a graphical overview of the project.</p> <p>View key header information about the project.</p> <p>Ability to access the following tabs: Projects, Reviews, Permits, Inspections, Certificates, Citations, Notices, Fees, Licenses, Meetings and Tasks depending on the type of project.</p> <p>Ability to view Map, Files, History for all projects.</p>

Search

Feature	Description
Search	<p>Ability to Search based on the following Projects, Reviews, Permits, Inspections, Certificates, Citations, Notices, Fees, Licenses, Meetings and Tasks.</p> <p>Ability to filter based on Project Number, Project Name, Process Type, Project Status and Address.</p> <p>Ability to filter based on Submission and Intake Dates.</p> <p>Ability to specify the columns to display in the Search output.</p>

GIS

Feature	Description
Arc GIS Online	<p>Ability to validate an address using Arc GIS Online.</p> <p>Ability to upload Shape file specific to the jurisdiction for parcel information.</p> <p>Ability to render a map based on the address information.</p>

Scheduler

Feature	Description
Automated process that performs the following functions	<p>Send out Email notifications.</p> <p>Raise Task Due Alerts.</p> <p>Sends out upcoming Inspections Emails and Alerts.</p> <p>Generates custom / ad hoc reports.</p> <p>Performs necessary function for project archival.</p> <p>Performs Project data export functions.</p>