ViewPermit
Innovative permit management

User Guide

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1   Installation

ViewPermit uses a self-updating deployment technology to install with minimal user interaction. Once installed, ViewPermit checks for newer versions as they become available and automatically replaces any updated files.

1.1   Open Microsoft Internet Explorer and enter the URL provided by your System Administrator. Typically, the following web page will appear:


1.2   Click the "Install" button and follow the instructions on your screen. ViewPermit will launch automatically upon completion of the installation procedure.

2   Security Login

ViewPermit supports active directory and adapts itself based on the logged-in user and the administrative group he/she belongs to.   Users will see their own inspections, project reviews and other tasks based on their login ID.

2.1   The User Login screen is displayed upon launching the program immediately after the splash screen:
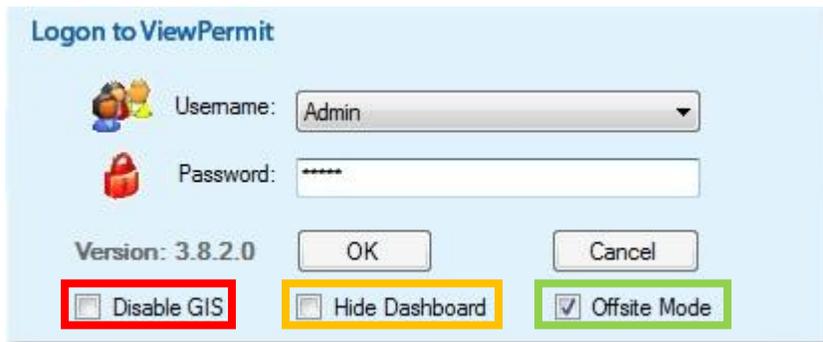
2.2   Type or select your username and type your password. If your municipality has chosen to use Lightweight Directory Access Protocol (LDAP), this feature will allow users to log in using their network credentials.

2.3   If you will not be utilizing GIS during your session you may select the **Disable GIS** box to help the program run more quickly.

2.4   To bypass the Dashboard and go directly to the Control Panel, check the box labeled **Hide Dashboard**.

2.5   LDAP users only: To bypass LDAP authentication when working off- site, check the box labeled **Offsite Mode**. You may then log in with ViewPermit-specific credentials.

3   Dashboard

The Dashboard provides a summary of the number of permits created, revenue by type of permit, fee collection timeline, average processing time, inspection calendar, and a list of pending applications.
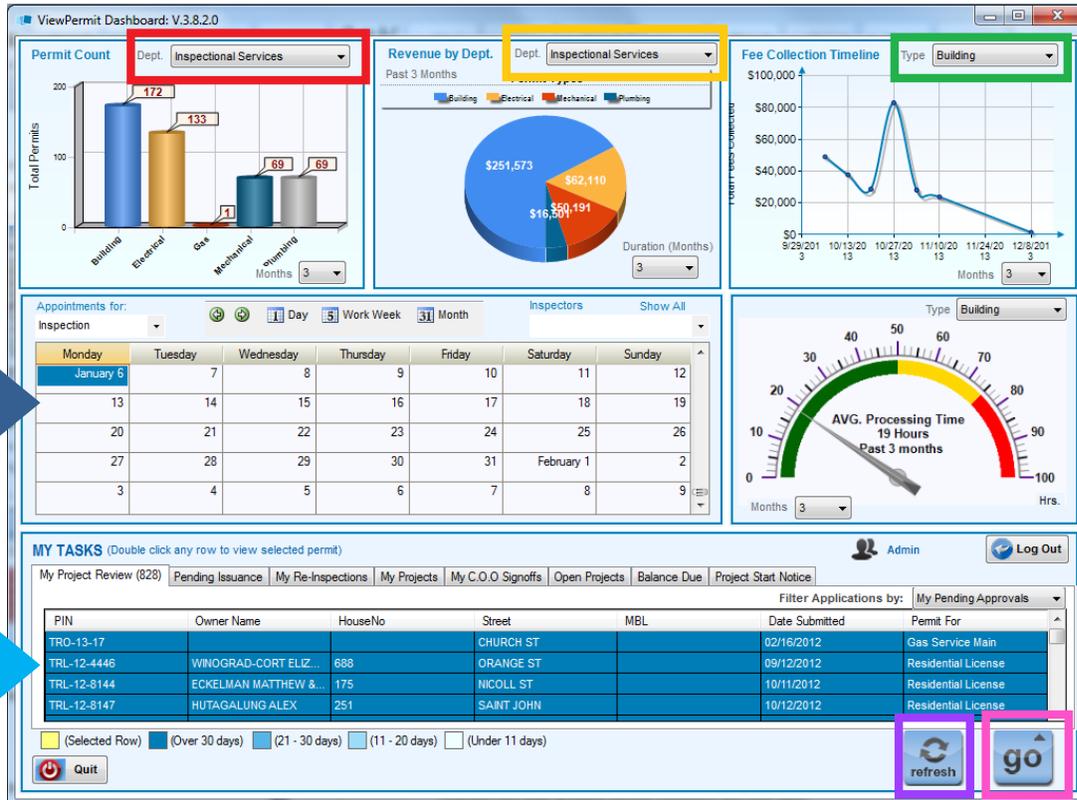
3.1   Filter the **Permit Count**, **Revenue by Type**, and **Fee Collection** timeline graphs by department or type by using the corresponding drop-down menus.

3.2   Double-click on any permit in the **Pending Applications** table to access the full record.

3.3   Double-click on any date in the **Calendar** to view scheduled inspections. To schedule a new inspection, fill in the requisite information and click Save.

3.4   Click the **Refresh button** to update the Dashboard to reflect any recent changes. Click the **GO button** to access any of the main **Control Panel** tabs (next page).

4 Control Panel

The Control Panel is an intuitive hub that allows you to create new permits and access, edit, and delete existing permits. Easily search by address, map/lot, permit #, licensee, contractor, owner, or project.

4.1   In the **Search Box**, type an address, map/lot number, permit number, or other search criteria in the top-left selection panel to display all related pending or issued permits in the tree view. Permits are numbered by type of permit, year of creation, and chronology. For example, B-10-15 indicates the 15th Building permit created in the year 2010.

4.2   The **Tree View** is color coded to indicate what stage of the process the permit is in. Black text indicates the permit is still pending, green indicates the permit has been issued, and red indicates a closed permit. More detailed status information and dates of actions can be found on the permit form. Click any permit number or icon in the tree view to view permit details in the main form. The tree view visually groups permits with associated parent/child permits. Clicking on a specific permit type will filter for only that type of permit and clicking "All Permits" will show all types again.

4.3   To add a new permit, choose a property (or a licensee if you are creating a license) and select the type of permit you wish to add from the **Permit Select** menu. *Note this must be done before you can create a new permit.* Click the "**>>**" button next to the permit group, and then choose the type of permit to create. Click the "**+**" button next to the permit type to load a new form in the main window.   The **Flags** button will blink red if the property, owner, contractor or permit selected has a flag entered on it. If you click on it you can open up more information on the specific flag or create new rules for flags.

4.4   The Owner information will populate automatically based on the address gathering information from your Assessors database. The rest of the information will need to be filled in manually.

4.5   Property setback requirements (if applicable) are displayed based on zoning classification and your community's by-laws. An exclamation mark icon and red highlighted text will warn of a setback violation. Clicking the **Save** button with a violation will trigger a requirement for Zoning Board of Appeals review and will automatically enable the checkbox in the Plan Review module.
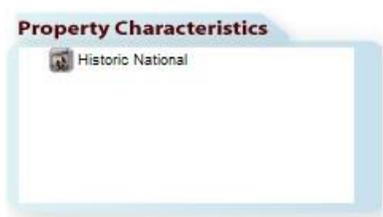
4.6 **Select the desired contractor from the dropdown list** OR **add a new one** by clicking on the plus button and filling out the required information in the **Personnel Manager**.
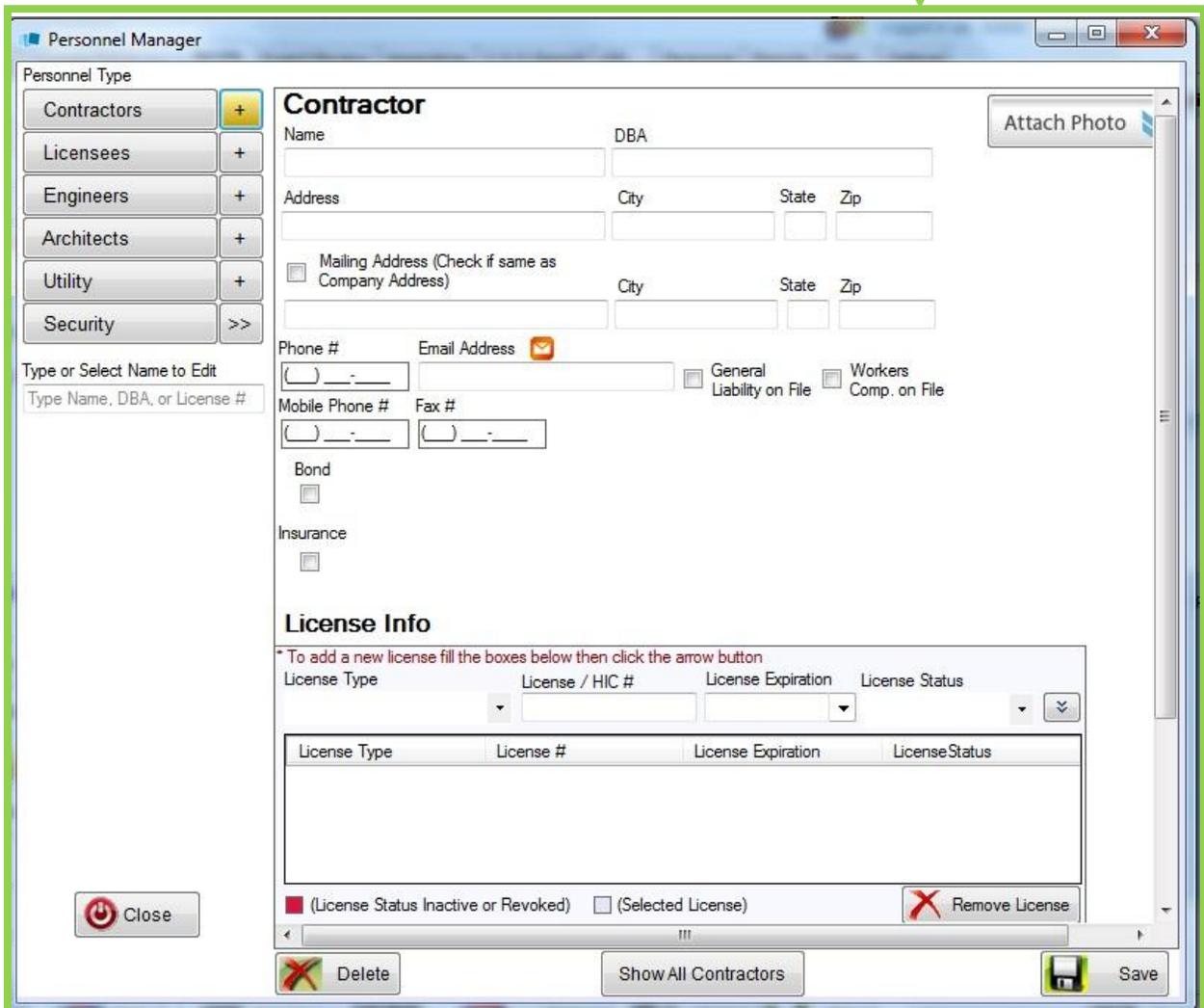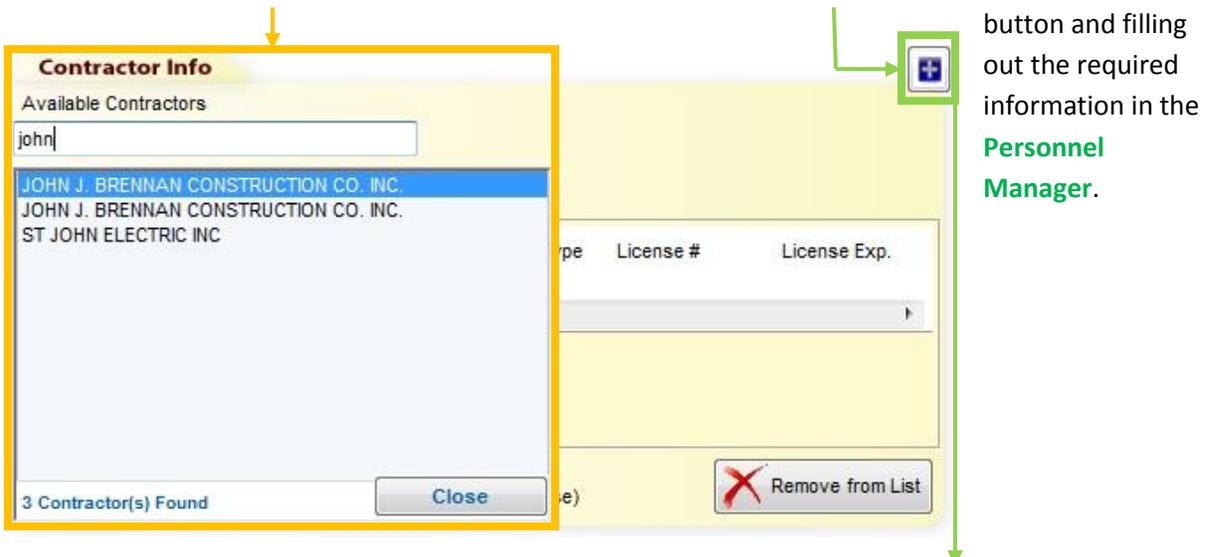
The box on the right will include the types of **licenses held by the contractor** - choose the license that best fits the project and click assign to add the contractor. An exclamation mark icon and red text will warn if a contractor's license has expired.

4.7   Click the **Calculate Fee** button to automatically calculate the required permit fee based on the type of work being done. Add a new payment by clicking on the **Add New Payment** button. Fill out the payment information and the Balance Due will automatically update.

4.8   Water, Sewer, Drainage, Gas, Mechanical, and Plumbing permits have fixture modules which allow you to display different appliances that are a part of a specific project. These fixtures can also be tied to fees which are added to the fee structure shown above. Select the floor location of the fixture by selecting from the **Location** drop-down menu. Then select the **Type** and **Number** of fixtures being added.

To add a fixture fee simply add the dollar amount into the **Total Fixture Fee** field. You can also add a **Total Demand Factor** in the field below. Press the **Add** button to the right of the **Number** field when finished entering a fixture.

Once all the data has been entered, hit the **Save** button at the bottom of the permit screen.

4.9   For houses that have not been assigned to addresses in the assessors' database but still need permits, select the **New Address** link below the street and house number fields in the **search box** (pg. 6). Enter the required information and select save. This will add a new, temporary address that you will be able to add permits to. Once the official address has been added to the assessors' database and assuming it is a different address number, click the 'switch address' link that appears for temporary addresses. Enter the official assessor's address that you would like to move existing permits/applications to and save. This will bring all of the permits already created to the new address.

4.10   To change the address of a specific permit, click the **Change Address** button in the bottom right corner of the **control panel** (pg. 6).

Express permits can be saved and issued instantly. All other permits receive a temporary number (e.g. TB-10-23) until review by the appropriate departments.

4.11   To search for licensees, select the licensee tab in the **search box** (pg. 6) and choose an existing licensee or create a new licensee. Selecting an existing licensee will list the licenses already held under that name. Create a new licensee by clicking the "**+**" button and filling in the necessary information (Name, Mailing Address, City, State, Zip, Phone Number, and E-mail). Once a licensee is either added or selected, view that particular holder's already existing licenses in the tree view or click the plus button next to the license you wish to create.
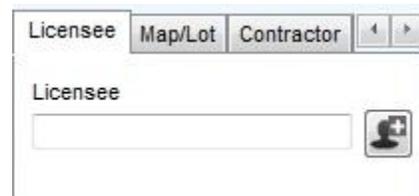
4.12   The indicator next to the **Edit button** will become red and indicate when you are editing a permit. If not, it will become black and indicate that it is currently in read-only mode.

4.13 Click the "**>>**" button next to **All Permits** to reveal settings for bulk renewals and permit cloning. Choosing **Renew Licenses** will open up the Renew Licenses Panel. You can filter by license type or by date. Simply select the checkboxes of the licenses you would like to renew and click "Renew License(s)." From this menu you can also **Clone** the selected permit to quickly make copies, view the **Workflow** of the permit, **Schedule an Inspection**, **View the History** of inspections or **Take a Custom Action**.
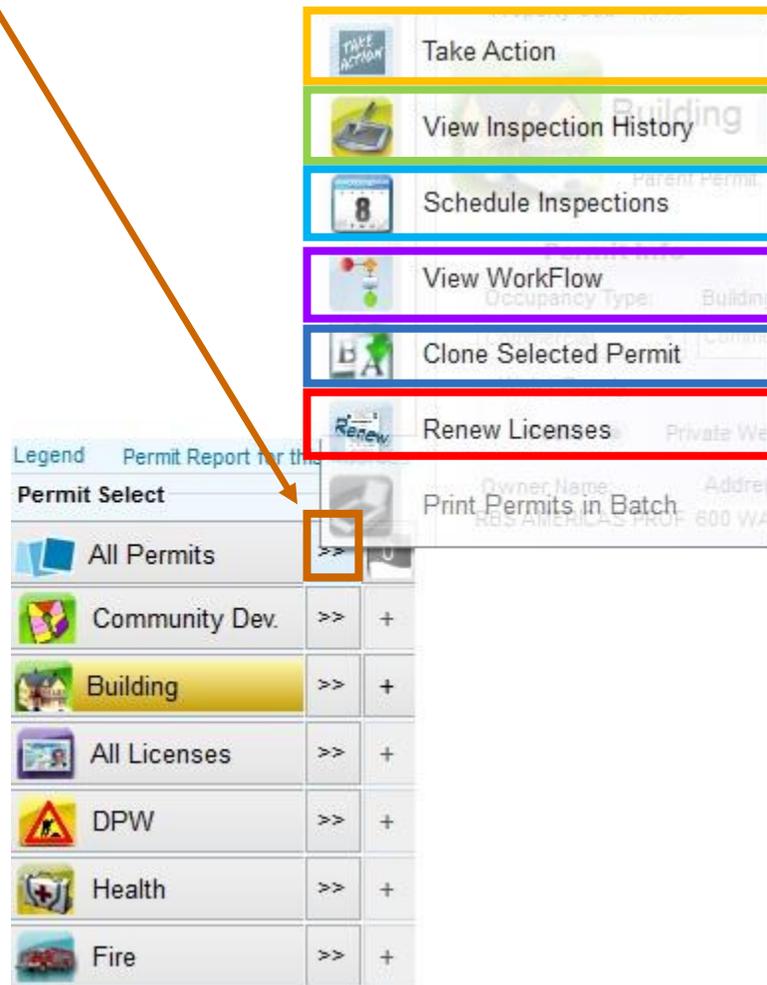
5   Plan Review

All non-express permits (permit number starting with "T") must undergo plan review and approval by the required departments before a permit is issued.

5.1   All Pending permits will be displayed in a grid and **colored based on age of permit** when you click the **Show Pending Applications** button at the bottom of the form. Double click any pending permit and ViewPermit will locate the address and load all permit info for review and further processing. Select the **Print Applications** button to print this table.

5.2   Pending permits can be sorted by clicking the header of any **Attribute Field** (PIN, OwnerName, HouseNo, etc).

5.3   The issuing department will be required to conduct plan review by default.

5.4   To t he left of the required department icons you will notice a button that says **'All'**. Clicking this button will show all departments even if they aren't currently required to sign off on the permit.

5.5   You can either require or request other Departments to conduct plan review. All "required" departments must either approve or conditionally approve a permit application before it can be issued. Add a required department by clicking on the appropriate icon at the top of the plan review page.

5.6   Next, select a permit **Review Status from the dropdown list**. Once a review has been completed the **Review Status** will change. This can be found below each department icon and will read either pending, not required, approved, or denied. Also located next to each department icon is an orange **E-mail Button** that lists the reviewers from each department and allows for simple e-mailing back and forth inter-departmentally.

5.7   After selecting both the user and review status you can specify whether the review is **Required, Requested, or None**. This lets the software know the importance of this department's or user's necessity in passing the project along. A required reviewer must give a status for the project to move to the next step whereas a requested reviewer is optional.

5.8 You can add plans and documents to the review by clicking on the **Attach New File** button within the Attach Plans/Documents box.

Attach Files

Plans (0)	Docs (0)	Photos (0)

Attach new file   Delete

5.9 Choose **Restrictions from the dropdown list** or write in a new restriction and add the restriction by clicking the **Downward Arrow** button.

Project Requirements

Select Restriction then Click ">>"

Maintain Site From Any Unsafe Conditions
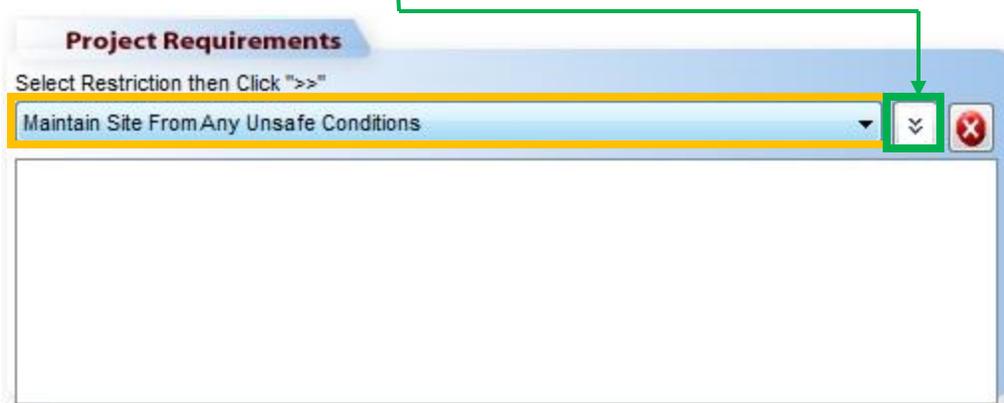
5.10 Any property setback violations will trigger Zoning Board of Appeals review. The GIS module within ViewPermit automatically performs spatial geo-processing to highlight property restrictions and further reviews. The GIS will trigger reviews for any area specified during the initial setup of the software. This could include wetlands, historical districts and flood zones.

5.11 At the bottom of the screen select the "**Show Pending Applications**" button to list all of the applications that will require your sign-off.

Staff Assignment / Project Management

Show Project Review History

Notify Reviewers of Plans Resubmittal

Attach Files

Plans (0)	Docs (0)	Photos (0)

Attach new file   Delete

Show Pending Applications

5.12   Click the **Refresh** button to ensure that all newly added applications by other departments are shown on your "Pending Applications" list.

5.13   To the right of the bottom right of the form is the **Generate Package** button which allows you to print all attached documents instantly.

5.14   Click the "**+**" button in the comments section to bring up the **New Comment Box**. Add a title and your comment in the space provided and save. The comment will show with a date and the name of the reviewer.

5.15   Click on the **Comment** to preview the text in the box to the right.

5.16   Once the Plan Review is completed by all required departments click the **Issue Permit** button.

5.17   You will be able to view all comments and permit status by other departments however you can only edit the sections authorized by your department.

5.18   Finally, a review log allows users to see the history of each department's sign-off. Click the **Show Project Review History** button to the left of the **Comments box**. The **Printable Table** that pops up shows the reviewer, action, department and its status, and date the action was taken.
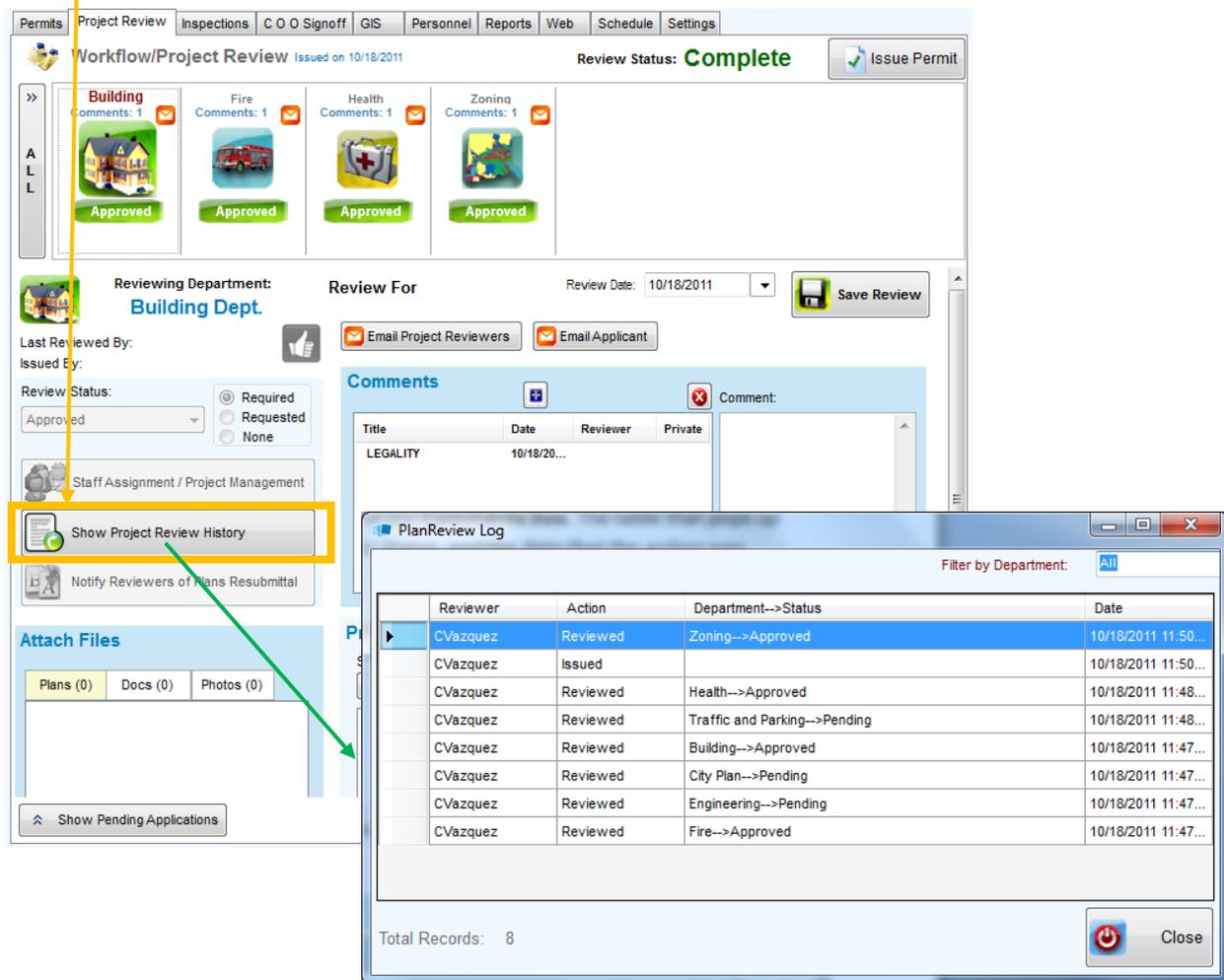
6 Inspections

All existing inspections pertaining to a specific permit will be displayed automatically.
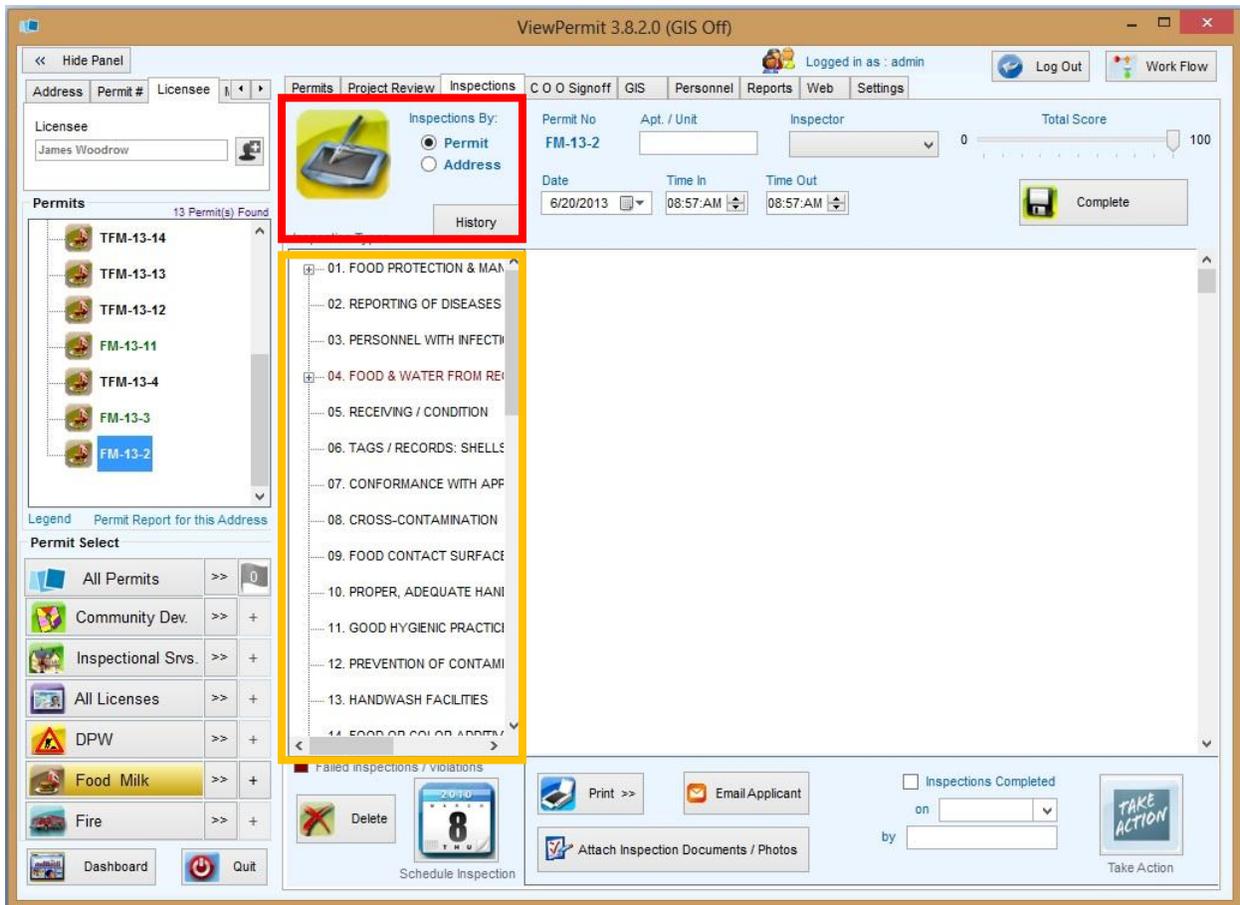
6.1 First choose an **Inspections By** Permit or Address. Choose "Address" only if inspecting a property as a whole rather than an individual permit inspection. Once the **Inspections By** has been selected, select an **Inspection Type** from the tree view. These may be different depending on the choice of **Inspections By**.
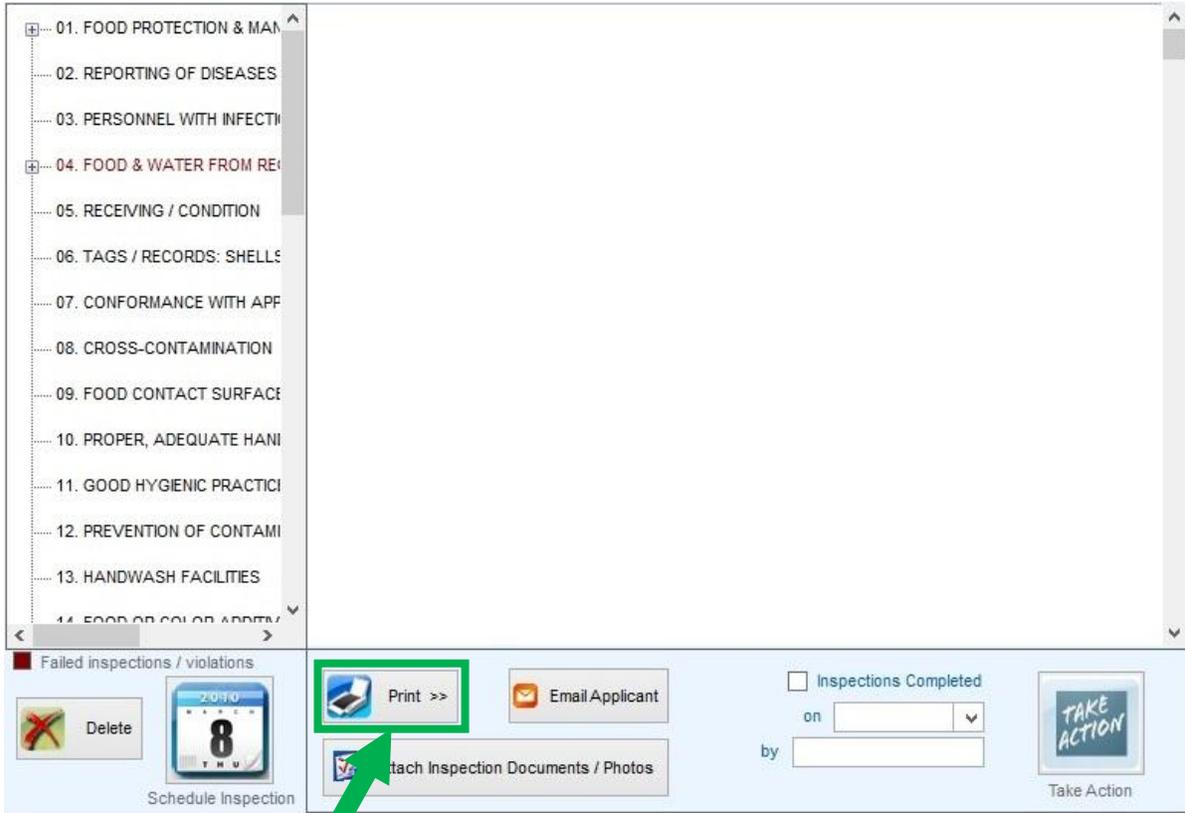
6.2   Select type of inspection from the list, prompting the inspection form to appear on right. This form can also be **printed** using the button located at the bottom of the screen.

6.3   Select **Inspector Name** from dropdown list. The default **Inspection Date** is automatically set to today's date. Enter a different date if required.

6.4   Begin filling out inspection by selecting **Status**. Inspection records that require **Follow up** are highlighted in yellow. Enter necessary **Comments** and finish by clicking the **Complete** button at the top right.
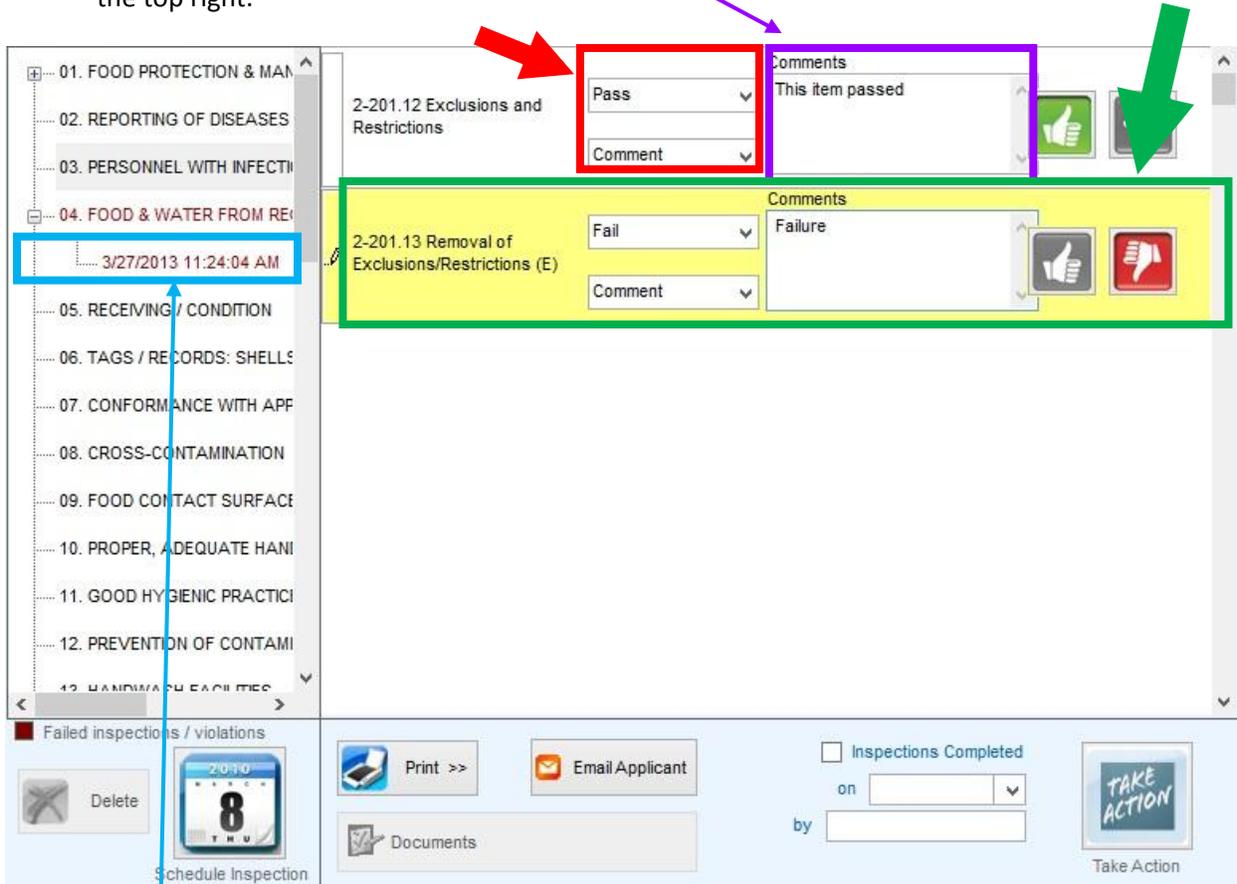
The **Saved Inspection** will be shown under the list of specific inspections on the left and can be edited in the future. The date and time are captured for the particular inspection.

6.5   Once an inspection is completed, select the **Inspections Complete** box.
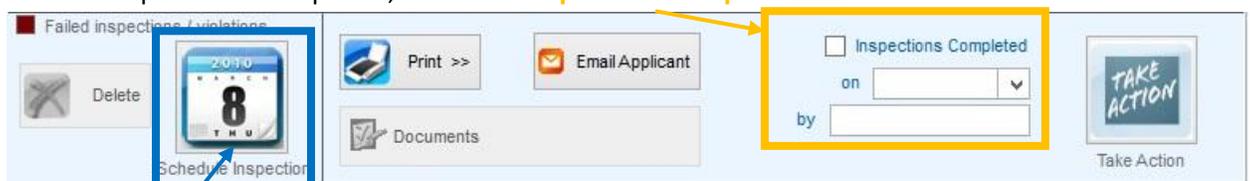
Use the **Calendar** located at the bottom of the screen to schedule new inspections or view other inspections already scheduled.

6.6   If at the end of the inspection process there is further inspection required, select the 'requires follow up' check box in the top right corner of the form.

6.7   Select the print button to open a call-out list that allows for a number of different printing options. Select the 'Selected Inspection' option to print only those individual inspection items on the inspection checklist that were changed. Select 'Permit Inspection Report' to print all individual inspection instances no matter what the inspection item. Finally, select the permit inspections template to print the entire inspection template for the entire project.
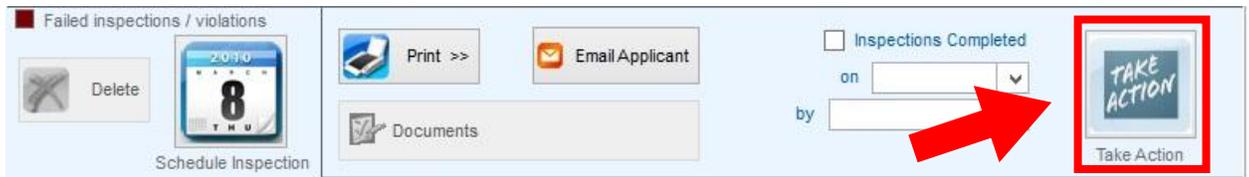
6.8   The **Take Action** button will allow you to perform any number of actions set up for the particular permit-for that is open. In this particular example you will see the standard actions for all permits (Certificate of Compliance, Certificate of Inspection, Stop Work Order and Violation Letter) as well as one specific to a Food and Milk inspection, the **Food Establishment Inspection Report**. This item will only be available when you select **"Take Actions"** while in a Food and Milk license. These reports may be customized with the help of ViewPoint.

7 COO Signoff

Using essentially the same format as the Project Review, the COO Signoff is a way for required officials to review work and signoff for Certificate of Occupancy and Temporary Certificate of Occupancy.

7.1 All **pending permits** will be displayed in a grid and **colored based on age** of permit. Double click any pending permit and ViewPermit will locate the address and load all permit info for review and further processing. Pending permits can be sorted by clicking any of the column headers. Remember to click the "Refresh Permits" button to make sure all newly added applications appear in your pending applications section.

7.2   Users added to COO Signoff security under Personnel->Security (setup detailed on pg. 28) will be required to sign off on particular permits.

7.3   You can either require or request other Departments to conduct COO Signoff. All **Required** departments must either approve or conditionally approve a permit application before it can be issued. Add a required department by clicking on the appropriate selection.

7.4   Once a department is selected, select the signoff status from the dropdown list. The status will be shown on the **Work Flow Status Bar** which is color coded to depict different stages of the permit review process. This can be found below each department icon and will read either pending, not required, approved, or declined.
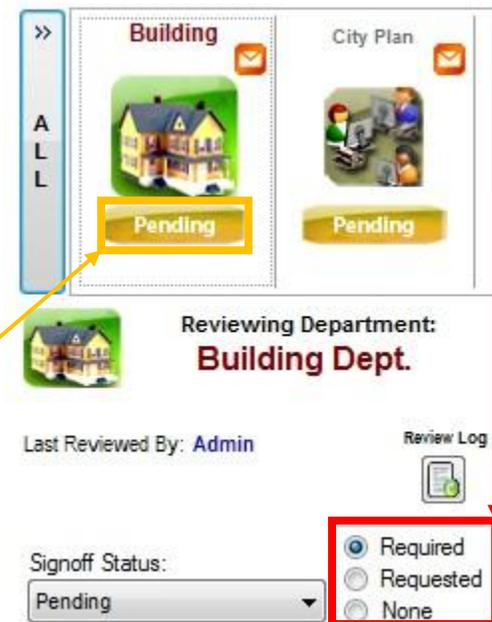
7.5   You can add comments to the COO Signoff by clicking on the "**+**" button within the comments box.

7.6   Once the required reviewers have signed-off on the particular projects and these sign-offs have been saved, the **Take Action** button will be enabled, allowing you to print a **COO** or a **TCO**.

7.7   For TCO documents that include a **Limit on Number of Days** there is a field that allows users to set the number. By default the number is set to 90 days. The field located to the left enables users to specify the **Building Code Year** for each COO.

8 Geographic Information Systems (GIS)
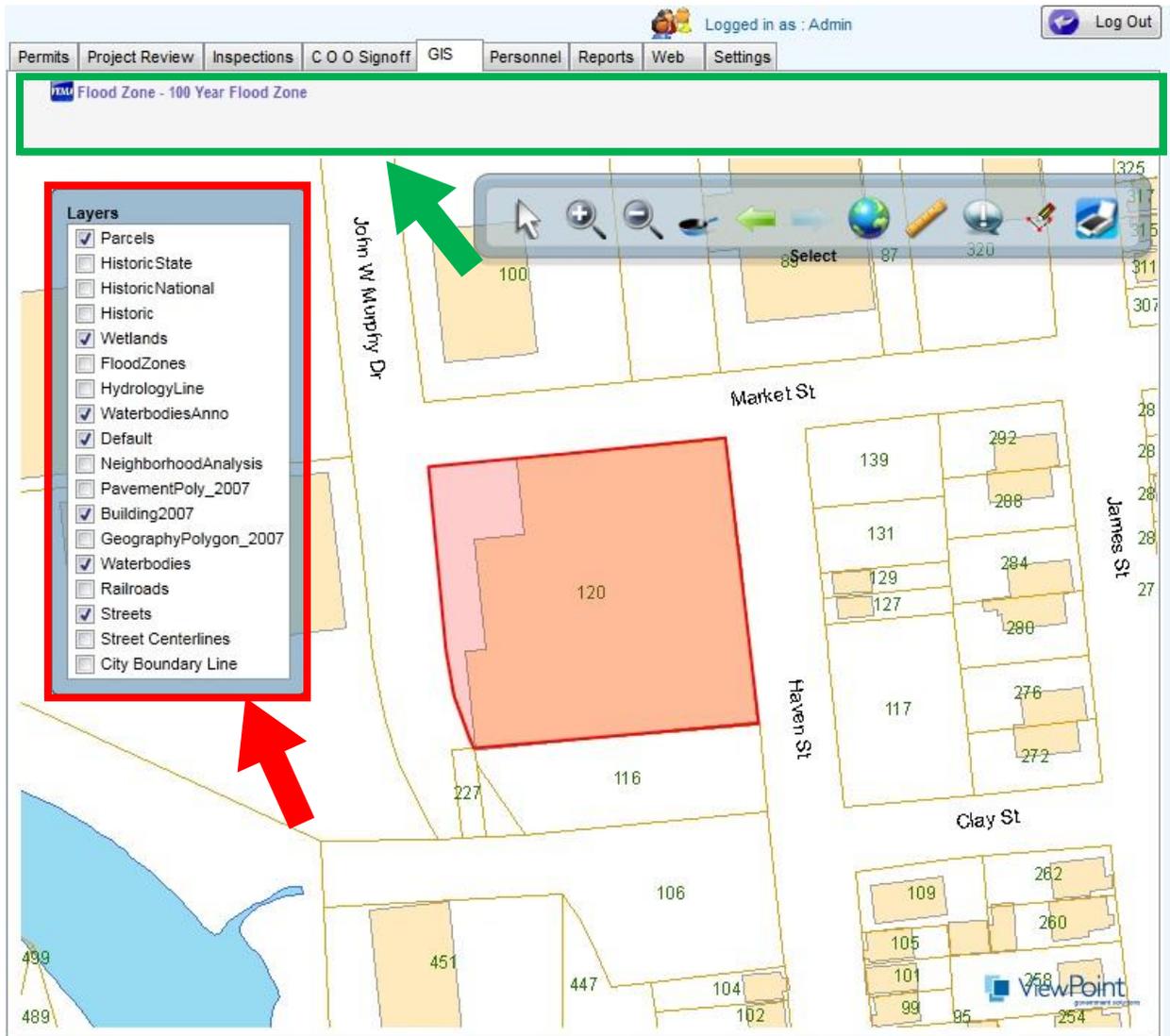
8.1 Upon selecting a street name and house number or a Parcel ID, the GIS map will zoom in to and highlight the selected property. The map will also display all available **GIS layers**. The GIS performs spatial geo-processing automatically to highlight property restrictions such as proximity to wetlands, flood zones, historical districts, etc. A list will be shown in the **Property Restrictions** box located above the map.

8.2   Click the **Select Property** button to manually select a property by simply clicking on the map.

     All permit, plan review, and inspection data related to the selected property are retrieved automatically.

8.3   Use the GIS tool bar to navigate the map, zoom in and out, pan, go to previous or next extends, go to full extent, measure distances, identify map features, draw on the map and print.

8.3.1   Zoom: The plus and minus symbols will allow you to zoom in and out of the map

8.3.2   Pan: This will allow you to click and drag the map around

8.3.3   Extents: These will go back to your previous view, forward to your next view, or you can click the globe to view the full extent of your map

8.3.4   Measure: This will allow you to measure the distance between 2 or more points

8.3.5   Identify: This will pop up a window with more information when you click on any property

8.3.6   Draw: You can manually draw notes onto the map

8.3.7   Print: Print the map

9 Personnel

The Personnel tab is an area which allows for contractor, engineer, architect, and utility creation as well as access to the user security and settings windows for administrators.


9.1 Enter the name of the person you wish to edit in the **Type or Select Name to Edit** box. It will find any name that is currently sitting in the database and choosing one of these members will bring his/her editable information.

9.2 Click the "**+**" sign next to the contractor button to create a new contractor with the contractor creation form to the right. Fill in the appropriate information including the license information and select the save button when ready.

9.3 To add an engineer, architect, or utility simply click the "**+**" sign next to the corresponding button and, as with the contractor creation form, fill in the basic information and save.

10   Personnel: User Security

Click the ">>" button next to the **Security** button to Manage Users, Manage Departments, Assign Users to Departments, access Permit Security, Plan Review Security, and CO signoff security.
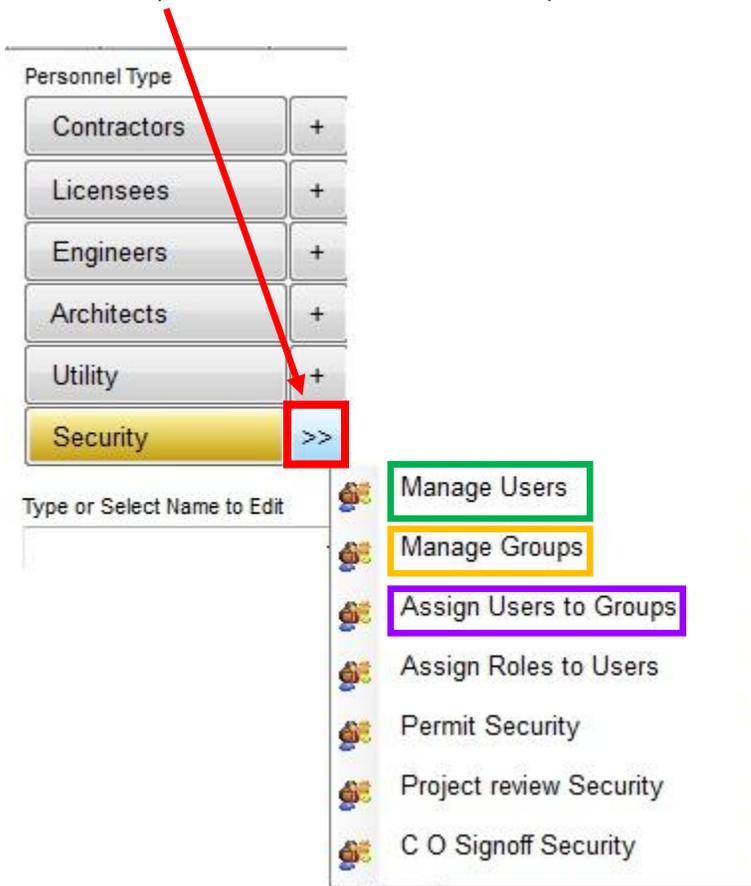
Only administrators have the ability to work with user security.

10.1   Select **Manage Users** to Add a New User. Enter Name, Password, and E-Mail then click the "Add" button to create a new user.

10.2   **Manage Groups** allows you to add or delete departments. Click on the **Assign Users to Groups** button to link a user to a specific department. Select the User you wish to assign and then select the department the user is being assigned to. Click **Assign** when finished.

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10.3   Select the **Permit Security** button to link a department with a permit type. Choose the Group and Permit Type you wish to link and then select **Assign**. This allows specific users within a group access to permit creation and, without a link between a department and permit type, users within specific departments may or may not have access to certain permit type creation.

10.4   To assign a project review type to a specific user click on the **Project Review Security** button. First select the desired user and then click the desired project review type, finish by selecting **Assign**.

10.5   Follow the same steps as above for assigning users to **CO Signoff Security** and finish by selecting **Assign**.

11 Reports

The reports will give you a general or detailed overview of all activity done within a specific time period.
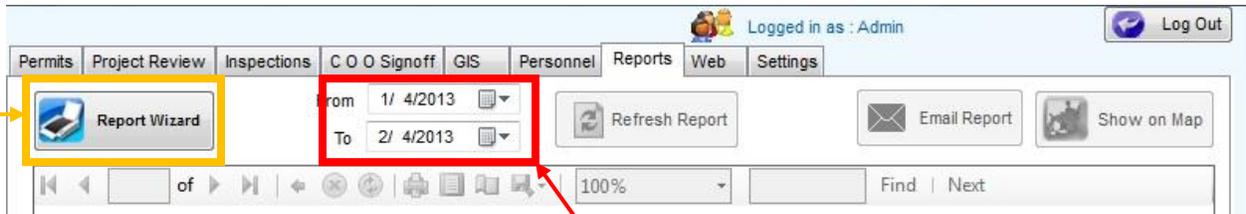
11.1 Select the report time frame from the **Calendar dropdown** to determine the "From Date" and "To Date". Click on the Month to enable a dropdown of all months in a year. Click the year to increase or decrease the year increment.

11.2 Select the **Report Wizard** button.

11.3 Select your Report Type then hit "Next."

![ViewPermit - Innovative permit management]
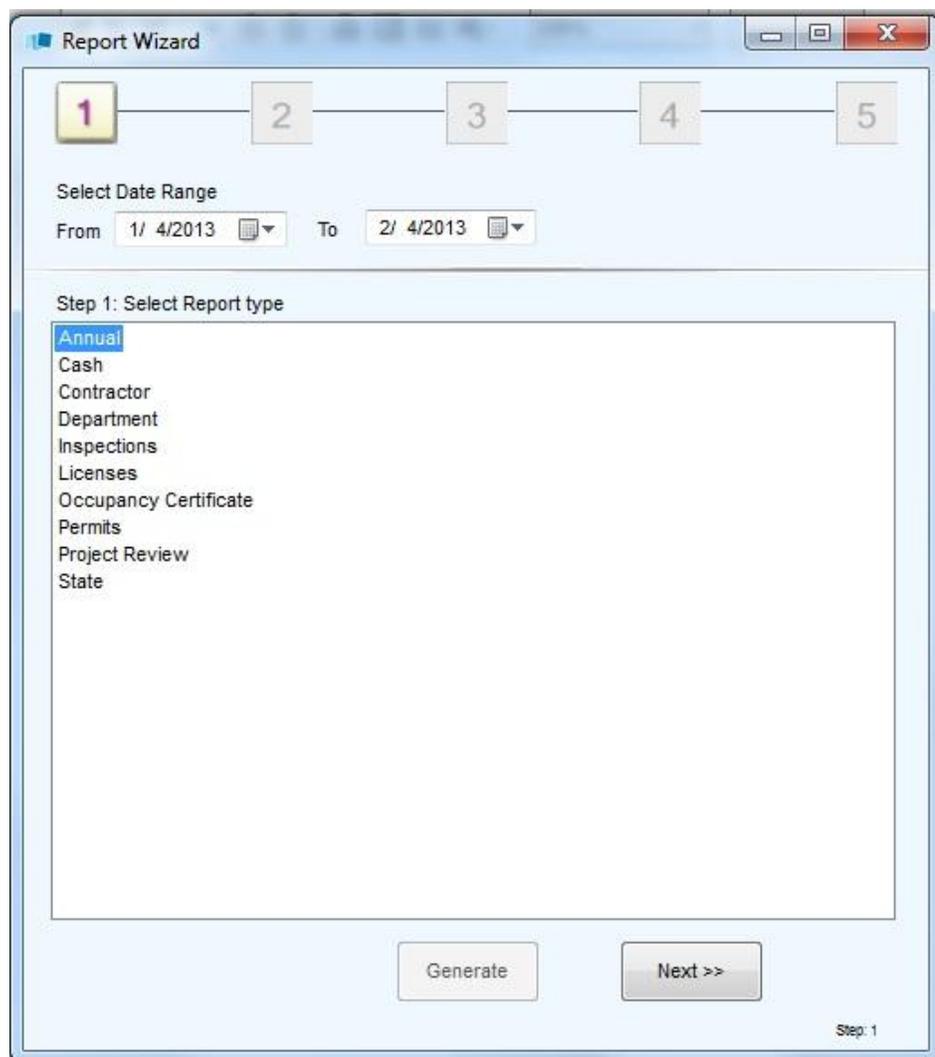
11.4   Depending on the report you are generating, once you select another report criteria you will either have the option to select "generate" or the option to select both "Next" and "Generate". If you select "Next" again you will be able to narrow down your report selections further before generating.
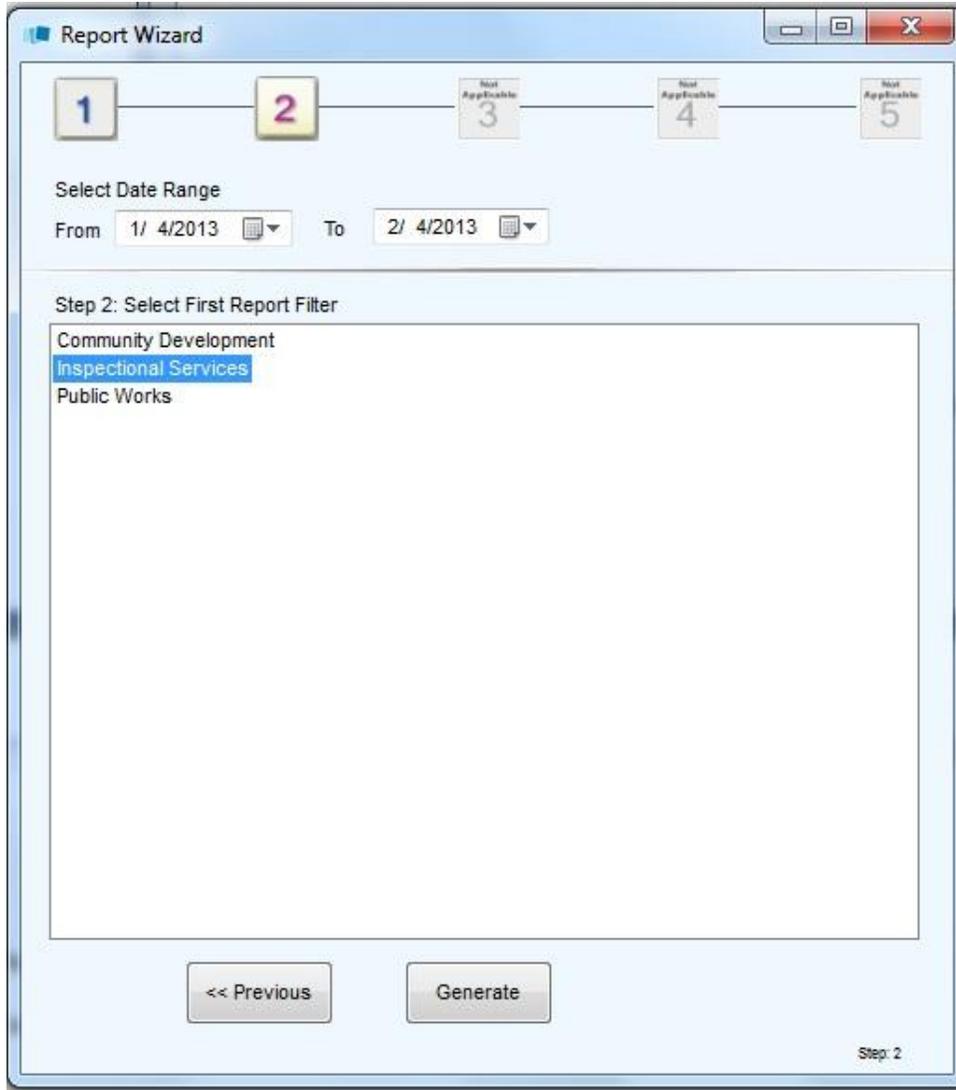
11.5   Use the Report Navigation tool bar to **Browse Report Pages**; **Print**; **Select Page Preferences**; **Export as Excel, Word or PDF Documents**; and **Zoom**.

11.6   If the report generated has individual record information you may click the **Pin** link provided on each row to be taken directly to that permit form.
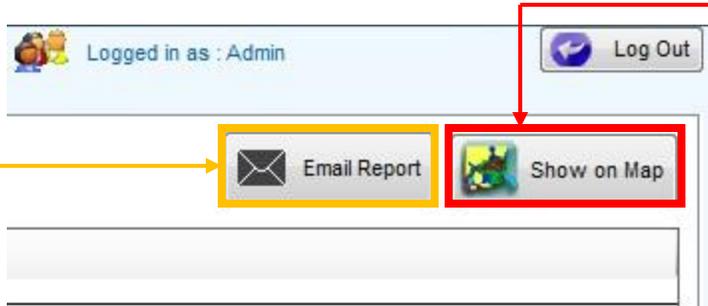
11.7 The **Show on Map** feature allows users the ability to create reports and then generate a map detailing the location of each permit. This feature is a great way to see patterns and trends across the municipality and is another way for users to make informed decisions.

11.8 You can email a report as an attachment by clicking the **Email Report** button.

12   Web Applications Manager

The Web Applications Manager contains four logs. The **New Applications** log lists applications that have been submitted via the web application. The **Issued Online Permits** log shows applications that have been issues online. The **Incomplete Applications** log lists those applications filled out by the online user but marked incomplete. The final log, **Online Inspection Requests**, lists requests for inspections that come through the web application.

12.1   Under **New Applications** double click a specific entry in the log to view it under the permit tab as a permit application. You will then be given the opportunity at the bottom of the form to accept or mark the application incomplete. Accepting the application will add it to the tree view on the left under the address it was submitted under. Marking an application incomplete will list the application under the **Incomplete Applications** log in the web applications manager.

12.2   The web applicants' e-mail is listed under "Applicant Email" on the permit form. This allows for town officials to email applicants to either send necessary information to be filled in by the official or the ability to let the applicant know that the permit application will need to be resubmitted with the necessary changes.

12.3   Double click on an incomplete application in the **Incomplete Applications** section to review the application once a web applicant has supplied sufficient information or to take a second look at the application.

12.4   Select the **Schedule** button on a particular pending inspection in the **Online Inspection Requests** log to open the inspection form. This form automatically displays information added by the web users and gives you the ability to edit this information and choose the inspector.

Online Inspection Requests **(2)**

PermitNumber	Street	HouseNo	InspectionDate	Time	Type	InspectionType	ApplicantName	ApplicantPhoneNo			
B-12-377	ACADEMY ST	10	11/5/2012	1:00PM - 4:30PM	Regular	Waterproofing	Hisham 2 Shamas 2	617-577-9000	hisham@viewpoint-g...	Schedule	Delete
B-12-377	ACADEMY ST	10	11/20/2012	8:30AM - 12:00PM	Regular	Above Ceiling	Hisham 2 Shamas 2	617-577-9000	hisham@viewpoint-g...	Schedule	Delete

Click **Save and Close** in the top left corner of the form to add the inspection to the inspections calendar within the inspection tab. Click **Delete** to remove this inspection once in the pop-up form or by clicking the delete button in the inspection log. You can also click **Inspect Now** to be brought to the Inspections tab for this record.

12.5   Use the **Refresh Button** at the bottom of the web applications section to update the logs.
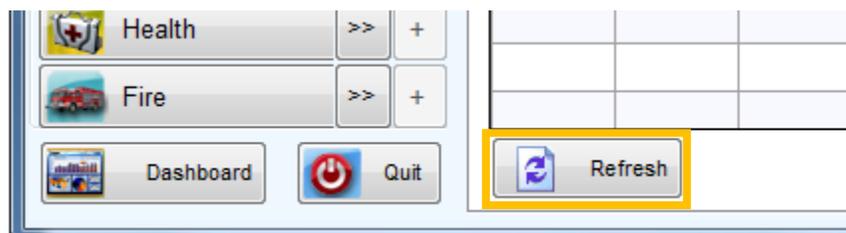
13   Settings

The Settings window is where much of the data seen throughout the software is located. Each municipality has their own data needs and this window allows for a certain level of customization. For example, this is where the town administrators are able to decide what types of inspections will take place for a building permit, what the fee structure is going to be for certain permit types, and which "fixtures" are going to be added to fixture dropdowns in mechanical, gas, plumbing, and electrical permits.

13.1   First, you can take a look at the new/edit section and decide what data will best reflect your municipality's needs. The data entered will eventually be linked to other pieces of data in the relationships field, allowing for the software to use the correct data at the correct time.

For example, when filling out the "building type" field keep in mind that the data will eventually be linked to occupancy type. This relationship allows for a building type of "multi-family" to be linked to a "residential" occupancy type. There would most likely be no need to establish a link between "multi-family" and a "commercial" occupancy type as people don't usually live in commercial buildings. This is where the importance of relationships comes into play, as detailed below.

13.2   Once you have entered your data into the **New/Edit** fields it is time to establish the relationships noted above by selecting the "**>>**" button next to the **Relationships** button. This will allow for a level of customization that makes the software even more efficient.
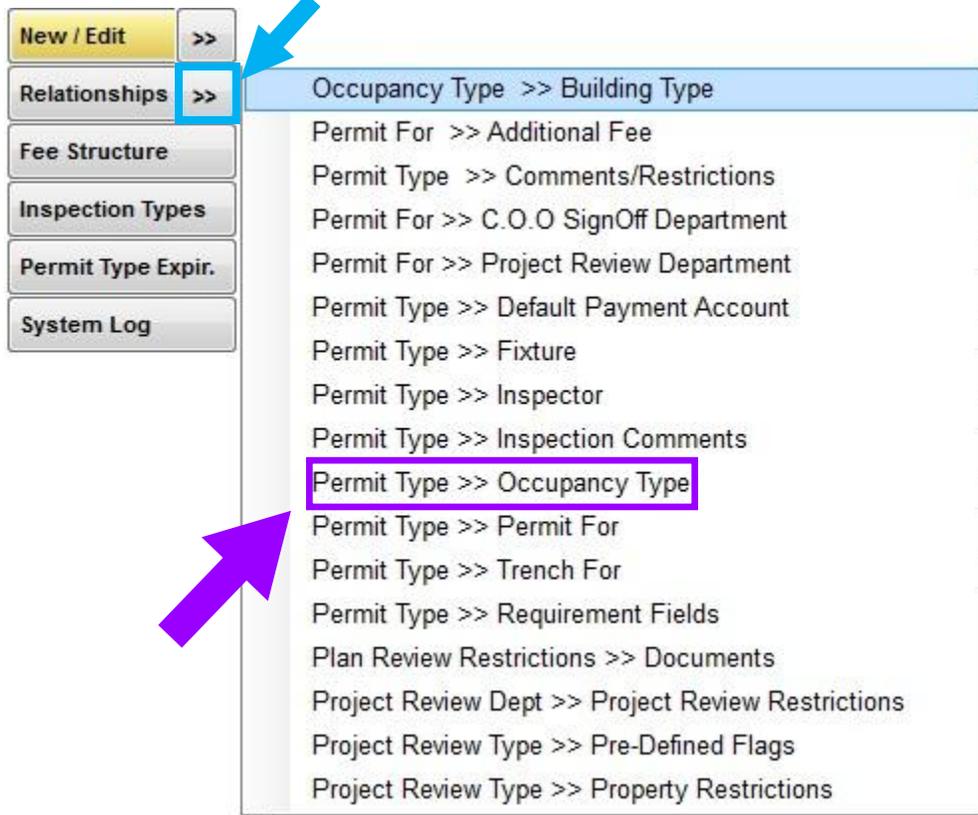
For example, instead of having every single building type show up for every permit type you need only to connect relevant building types to certain permit types by selecting the **Permit Type >> Occupancy Type** option. It is important to familiarize yourself with the permit forms while setting up these connections in order to better understand how the process works and where the data you are now entering will be showing up on the permit forms.

13.3   The third aspect of the settings window is the fee structure window. Click on the **Fee Structure** button to open this window and customize your municipality's fee structure. First select the **Permit Type** from the dropdown. This dropdown lists all the permit types available for creation. By selecting an electrical permit type, for example, you will trigger the occupancy types for that permit type, these will populate on the left. If you were to select a residential occupancy type the subsequent "Permit For"s that were added earlier under the **New/Edit** fields would show up. Set both a minimum fee and an incremental fee and decide which fees will show up for specific projects (permit for). The same can be done for all occupancy types within a permit type and also for all permit types that are available to your specific municipality.

13.4   The fourth section of the settings module is **Inspection Types**. This allows you to choose which items will appear on the inspection checklist within the **Inspections** tab. You will first select a **Permit Type** from the dropdown at the top and then a **Permit For** from the list. You can then select a currently existing inspection type or select one from the dropdown list and add. Once you select your inspection type from the list you can choose a **Checklist Item** from the dropdown to add it to that inspections checklist.
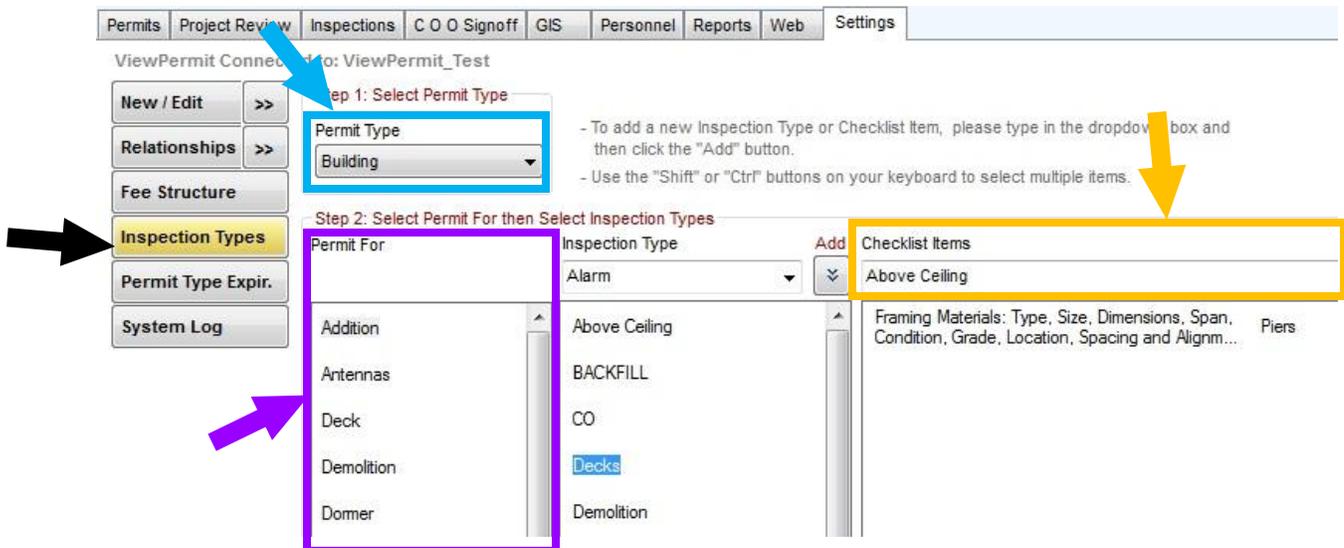
13.5   The fifth section within the setting module is called the **Permit Type Expiration** section. Since most municipalities require a certain criteria for expirations of permits the software allows users to go in and adjust these criteria based on local by-laws. This feature is especially important for those municipalities who issue licenses based on time from issuance opposed to a set date in time.

13.6   The final feature within the setting module is the **System Log**. This log allows administrators the capability to go in and see every action taken by each individual user. This is important for keeping tabs on what has been entered into the system and who has been doing what.

ViewPoint Government Solutions • 385 Concord Ave.

Belmont, MA 02478 • (617) 577-9000