

# **PERMITS PLUS VERSION UPGRADES**

## **NEW FUNCTIONALITY**

# **PERMITS PLUS VERSION UPGRADES**

## **NEW FUNCTIONALITY**

Comparison of upgrading to 4.7.xx Verses 5.0.xx

PERMITS PLUS VERSION UPGRADE

Functionality Changes in 4.7.xx .....Page 1

Functionality Changes in 5.0.xx .....Page 11

# PERMITS PLUS VERSION UPGRADE

---

## Features Summary

For details see page numbers referenced in parentheses.

### Security

- Override Status table settings (1)
- Ability to delete LHN (7)
- Expire passwords (7)
- Restrict APD with pre-defined prefixes/categories from appearing when search using List by Number for specified users (15)
- Excluded User List for users excluded from category restrictions (15)

### LHN

- Order of (1)
- Set expire dates (9)
- also see security above

### Reports

- Fee Detail Report – ability to reverse amount sign (6)
- New Report - Accessed Fee Extract to ASCII File (16)
- Fee Payment Extract to ASCII File (17)

### New script commands to:

- Create relationships (8)
- Create, read and erase user defined lists (8)
- Determine if APD exists (9)
- Add a person to an activity (10)
- Retrieve user supplied input including value chosen from a drop-down list (13)
- Also see inspections

### Enhanced searching for:

- Fee items by category, item no, desc, account code and trust (9)
- Valid street names containing specified characters (15)

### Address

- APD addresses – added Structure, Floor and Unit fields to screen (10)

# PERMITS PLUS VERSION UPGRADE

---

## Features Summary

- More Button added to Parcel Loc to display Address toolbar, and to Address Loc to display the parcel toolbar (14)

### Inspections

- Actions Lists for Inspections items (11)
- Associate comments to inspections (11)
- Guide Sheet (task list) for Inspection Items (12) and ability to apply actions to guide sheet using drop down list (14)
- New script command to:
  - Return guide sheet status (12)
  - Return total mileage and elapsed time (14)
- Vehicle id and Begin, End and Total mileage fields added to inspection screen (14)
- Begin times and mileage can be auto-populated from previous end values (14)
- Added a work description field to request for inspections allowing entire text to be seen (15)
- Schedule all inspections automatically in one operation by inspection type (18)
- Comments on request for inspection screen now 100 characters (20)
- Date of last entered actions on Inspections Items screen added (20)

### Initializing Activities

- Can create activities for each parcel in a set of parcels with special handling for inactive or retired parcels or parcels with Locks or Holds and for comps with workflows (13)
- When inheriting APD items can associate source APD as parent (19)

### Sets

- Apply parcel payments to set members when paying specific items – each set member with fee item will receive payment amount if balance due is at least that much (19)
- Can create relationships for members of a set if parent has no lock (20)

### Others

- Email address available on Screens (1)
- Script triggers when action applied to Approvals, Conditions, and Inspections (1) and limit actions appearing in drop down to only those that apply (13).
- Enhanced printing capabilities on various screens and can print calendar (1 and 2)
- TrueGIS OLE Interface (2)
- Docs Plus (2) and support for printer names over 32 characters and more printer settings when using docs plus (16)

# PERMITS PLUS VERSION UPGRADE

---

## Features Summary

- Store Images in Oracle DB (6)
- Bond and Liability expire dates and messages for CAED (6)
- Workflow automated update of start and end dates (7)
- Carriage control in e-mail Body (7)
- Virtual Data Items – Unlimited number for compositions, APD, Parcels, Addresses, CAED and attachments and can be used across them. Can be used on screens and docs (8)
- Changes to button labels (8)
- Decide what date to show on APD toolbar (9)
- Cloning – Preserving date fields (10)
- Access 2000 compatibly (11)
- More Button added to APD People to display CAED toolbar (14)
- Subtype added to relationships screen (20)

# PERMITS PLUS VERSION UPGRADE

---

Functionality Changes in 4.7..... Page 6

Functionality Changes in 5.0 .....Page 17

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **Expanded E-Mail address functionality (introduced in 4.7.50)**

Email address text boxes have been added to the parcel people, address people new C/A/E/D and APD people screens.
  
- **New Script Triggers (introduced in 4.7.50)**

3 new script triggers ACT-APPR, ACT-COND and ACT-INSP have been added. These scripts will run when action is applied to an Approval, Condition and Inspection. Also 5 new read-only fields are populated when action is applied to these.

2 New script commands have been added to return the recorded time in minutes of a task, folder and workflow.
  
- **User Override Status Table settings (introduced in 4.7.50)**

Users can override valid status table settings. Valid status can be set to enable or block the ability to update activity screens such as LHN's Inspections, Approvals, Conditions, Parcels, Addresses, People etc. The update capabilities are selected in valid statuses screen of composer in the Update Capabilities tab.

On the User defaults screen of the Administrator Module a checkbox has been added that allows the user to override the status table and a one that displays a message box to prompt the user to override status update capabilities.
  
- **LHN's Order by Priority, Effective Date on LHN screen (introduced in 4.7.50)**

Can order L/H/N/C in priority order and effective date by setting the LHNordersByPriorityDate=True ini setting. The order is Locks, holds, Notices and comments.
  
- **Items and Entries on Inspection, Conditions and Approval screens can be printed (introduced in 4.7.50)**

Print grid functionality has been added to Inspections, Conditions and Approvals screens.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **A Docs button has been added to the inspections screen so that documents can be printed from there (introduced in 4.7.50)**

The ability to print documents from the inspections screen has been added by supplying a Doc button.
  
- **TrueGIS OLE Interface (introduced in 4.7.50)**

New OLE interface to GIS application using Active-X server object DxGisLink.exe to communicate. 2 classes and their properties, events and methods become available for use in the GIS application that supports VB for macro development. The class clsPacket object provides the link between TruGIS and the GIS application.
  
- **Printing Inspection Calendar (introduced in 4.7.50)**

Can let users specify print content of calendars. They can specify the columns to print and the order as well as the rows to print and their order. A print grid dialog box is used to specify print contents.
  
- **New Docs Plus Document Creator (introduced 4.7.50)**

Anyone on Windows 2000 needs to be using the new Docs Plus Document Creator according to Accela. Accela can not make changes to the High Edit software included with prior version of permits plus because it is 3<sup>rd</sup> party software. The new Docs Plus Document Creator was introduced in 4.7.50.

Docs Plus has several new features that are supposed to allow easier document creation. These new features include:

### File Menu

Open a File

Can bring in existing word and html documents.

Save as a File

Can save file as .txm, .doc, .rtf, .htm and .txt

Print Preview and Page Setup

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

Print preview and Page setup have been added to File menu. In Print Preview can view 2 pages at a time.

### Edit Menu

#### Redo Deletion

Restores changes eliminated by Undo.

#### Delete

Removes selected items from document without placing a copy in clipboard.

***NOTE:** To delete data items, right click on it and choose delete.*

#### Find

Find text within document.

#### Replace

Replace text within a document.

### View Menu

#### Views Available

The ability exists to view document in Normal, Page Layout and Centered Page Layout views

#### Headers and Footers

The ability exists to add headers and footers to documents inline. They appear as part of the document. DocPageNo is a new system defined field that can be placed in header or footer to print the page number.

#### Toolbar functionality

The ability to turn on and off various toolbars including the Toolbar, Paragraph bar and Ruler and Status bar. Also a Field

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

bar that lists the last item selected by the user is available and can be turned on or off.

### Zoom

The ability exists to magnify or shrink the view of the document.

## Insert Menu

### Image

Images can be inserted into documents without being tied to a line in the document. Text will flow around the image and the image is not moved when text is added/changed/deleted.

*Note: Images can also be added dynamically by creating a user-defined data item on the composition with a name starting with ImageAT\_*

## Format Menu

### Character

Vertical offsets can be applied to Sub and Superscripts

### Paragraph

Paragraph spacing now allows you to change the space between current paragraph and surrounding ones.

### Bullets and Numbering

The ability to add bullets and numbering exists including some setting of attributes.

### Tabs

A menu item exists for the setting of tabs.

### Paragraph Frames

Items can be set in a frame ie paragraphs. The width of the paragraph lines can be set as well as the distance of text from the frame.

### Background color

The background color of selected text can be set.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

### Image

For images added to document there are display options and image borders that can be set.

*Note: Resizing an image is possible along with resetting the size by double clicking on the image.*

### Table Menu

#### Insert/Delete

The ability to insert and delete a column to a table exists. The option to insert to the right or left of the cell is available.

The Adding and deleting of rows now allows you to insert above or below a cell.

A delete table option has been added.

#### Select

The ability to select rows, columns and tables for formatting text exists.

#### Gridlines

Toggle added to make gridlines visible or not in composer.

#### Properties

Line width, background color, padding and vertical alignment for a table can be set.

*Note: other table functionality includes:*

- a. Data items can be added to a cell by pressing the data button while in a cell.
- b. Images can be added to a cell.
- c. Column widths and heights can be changed by moving the edges.
- d. Single cell widths can be changed by dragging adjustment marks on ruler after clicked in a cell.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- e. Realigning of all columns can be done by clicking on vertical lines.
- f. Text formatting and alignment within cells is possible.
- g. Can tab to next tab stops within a cell by pressing CTRL Tab.

➤ **Store Images in SQL and Oracle Database (4.7.51)**

Instead of images being limited to the image database or images files now images can be stored directly in our Oracle database in new tables IM\_TAB and \_C\_TAB. A new ini setting ImageFiles=DB must be added to the [IMAGING] section and the IDB= section must be removed from the [DATABASE] section of the ini file. Image screen functionality has changed so that when images are imported/scanned they are stored in the Oracle database.

➤ **New Command for Detail-List Mode of Fee Detail Extract to ASCII File Report (4.7.51)**

A REVERSE-SIGN command has been added for Report 130 (Fee Detail Extract to ASCII File). It reverses the sign of the returned AMOUNT. The command can go anywhere in the config file.

➤ **Bond and Liability Insurance Coverage fields for C/A/E/D Processing (4.7.51)**

The C/A/E/D general information screen now has a Bond/Liability tab that has several new fields (fields are also added to CON\_BASE table). These Read/Write standard fields are available to use on screens, documents and scripts. The new fields are:

- Bond\_Type
- Bond\_Amount
- Bond\_Expire
- Lib\_Carrier
- Lib\_Amount
- Lib\_Expire

The new fields have default labels that can be changed by including one of the these new ini settings into the [OPTIONS] section of the ini file:

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

ConTabBondLiability=  
ConLabelBondType=  
ConLabelBondAmount=  
ConLabelBondExpire=  
ConLabelLiabilityCarrier=  
ConLabelLiabilityAmount=  
ConLabelLiabilityExpire=

If the current date is greater than the Bond Expire Date/Liability Expire Date a warning message appears when adding the C/A/E/D to the activity. Also in the Inspections Module a warning appears when selecting a C/A/E/D when entering an inspection request.

➤ **Status Change Updates Start and End Dates for Workflows (4.7.55)**

The start and end dates of tasks, workflows and folders can be updated to the system date automatically when a status from the workflow status table is applied to it. This is done if the new checkboxes “Update Start Date” and “Update End Date” which have been added to the workflow status maintenance screen are checked. The Set\_Start and Set\_End columns are added to the FL\_STATUS table.

➤ **Delete Security for Lock, Holds, Notices, Comments (4.7.58)**

Administrator’s User Defaults screen now has a LHNC Delete Security Processing section that allows users to be selectively disabled or enabled to delete L/H/N/C.

➤ **Expire Password Functionality (4.7.58)**

A new ini setting DaysToExpirePassword has been added to the [OPTIONS] section of the ini file. A number of days can be specified to indicate how many days passwords are valid for. When a new password is created for a user it is only valid for the number of days specified in the ini file. The expiry date is stored in a new Password\_Expire column of the USR\_BASE table. After that date is reached the user is prompted to change their password at login.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **Script E-Mail Command <EOL> inserts carriage return into E\_BODY (4.7.59)**  
When <EOL> is added to the script in field1 for the E-BODY command a new line is entered into the email body.

- **User Defined Virtual Data Items (4.7.60)**  
An unlimited number of Virtual Data Items can be assigned to compositions and can be defined for APD's, Parcels, Addresses, CAEDs and Attachments. By using 2 new script commands GET-VDI and PUT-VDI they can be accessed from other APD's, Parcels, Addresses and CAEDs. The Virtual Data Items can also be used on screens and documents. The limitations regarding the use of Virtual Data Items as well as description of the use of the new script commands are in the 4.7.50 Features pdf file.

Two new tables VDI\_DETL and MDL\_DETL have been added to support these.

- **User Defined Labels for Toolbar Buttons in Permits Plus (4.7.60)**  
The labels on the command buttons for the activity, parcel, address, attachment and CAED toolbars can be modified. The Toolbar Buttons for Composition Maintenance screen in composer now allows entry of a max of 10 character label (only 7 of which will display on the button – entire 10 can be seen with tool tips).

- **New Script Commands REL-APD and REL-OTH (4.7.67)**  
Two new script commands are used to create APD relationships and Other Relationships for APDs. REL-APD creates relationships with regard to the APD type (A,P or D) while REL-OTH creates relationships with no regard for type. Field1 is the target APD (literal or user-defined field) to relate to the current APD. The HI LO and EQ indicators give information about success or failure of association as seen in the 4.7.50 Features pdf document.

- **User Defined List Script Commands (4.7.69)**  
Script commands have been added to create, read and erase user defined lists. User defined lists created with the new PUT-UDL command are only

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

available within scripts. GET-UDL is used to access lists defined using PUT-UDL and those created using User Defined List Maintenance screen. The Erase script command removes lists created with PUT-UDL. Using Work fields as variables is not supported using PUT-UDL or GET-UDL. The data types in field1 and field2 must match and it is recommended to use more specific commands PUT-YN, PUT-N, PUT-T, PUT-C and PUT-D instead of the generic PUT-UDL command and GET-YN, GET-N, GET-T, GET-C and GET-D instead of the generic GET-UDL command. The HI LO and EQ indicators give information about success or failure of the command as seen in the 4.7.50 Features pdf document.

➤ **A/P/D Exists Script Command (4.7.69)**

A new script command EXISTS has been added to determine if an activity exists and if so it returns the A/P/D status flags to determine if it allows script processing and if the activity is locked.

➤ **Search Functionality for Fee Item Maintenance Screen (4.7.69)**

The Fee Item Maintenance screen has grid search functionality that allows fee items to be located by specifying search criteria. The new Search BY frame allows searching by Category, Fee Item no, Description, Account Code, and Trust.

➤ **Change A/P/D Toolbar Date Field ini File Setting (4.7.69)**

The ability to define the date field to display for a composition type on the A/P/D toolbar has been added. The new ApdToolbarDate ini file setting defines the composition type and date field (Entered\_Date or Date\_A through Date\_N). This is a comma delimited multi-line ini setting. Each composition type and date field is separated with commas.

➤ **LHNC Default Expire Date ini file Setting (4.7.69)**

A new ini file setting LHNExpireDate has been added to the [OPTIONS] section to define the LHNC expire date in mm/dd/yyyy format. This date which must be > the current date. This date will be applied to the expire date text box on the LHNC maintenance screen when a LHNC is added. If the current date is past the expire date (of if expire date is not in format mm/dd/yyyy) 12/31/2020 will apply.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **Preserve Date Fields with Cloning A/P/D's ini File Setting (4.7.69)**

A new ini file setting ClonePreservesDates has been added to the [OPTIONS] section to define the date field (Date\_A through Date\_N) to preserve when cloning an APD in Permits Plus. Many or even all dates can be preserved providing that the respective "Date Field" checkbox in Clone an Activity screen is checked.
  
- **Attachments SFU Linked Address Data Fields and Display Functionality (4.7.69)**

The Structure, Floor and Unit have been added to APD addresses (apd\_adr) for addition to screen and use in scripts. To display these read-only fields (Structure\_Id, Floor\_Id and Unit\_Id) 2 new ini settings have been added to the [OPTIONS] section. ApdToolBarDisplaySFU=True will display the SFU info on the APD toolbar. Report131DisplaySFU=True will print SFU info on the Inspection Request Worksheet.
  
- **Add A/P/D People Script Commands (4.7.69)**

Three new script commands have been added to add a person to an activity. PEO-NEW assigns people name and relationship to a temporary storage area. The name must be entered in field 1 and the relationship in field 2. PEO-DATA assigns the people address1 – 4 data, zipcode, phone, notation and email info to the temporary storage area. To do this values are put into field 1 for the address fields indicated in field 2. PEO-PUT creates an APD person record from the information stored in the temporary storage area before clearing it.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

➤ **Access 2000 compatibility (5.0.1)**

➤ **Actions Lists for Inspection Items (5.0.1)**

2 buttons have been added to the Inspection Items maintenance screen. They are used to access the Actions Lists maintenance screen which is a new screen used to associate inspection items or types with actions from the actions table. The ability to select multiple items is available on the actions maintenance screen if it is accessed from the Actions List maintenance screen. An OK button has been added to the Actions maintenance screen. When the Actions maintenance screen is accessed from the Actions List maintenance screen the OK button is used to add actions to the actions list.

A drop down has been added to the Inspection Items screen which displays items from the action list for the inspection item/type. The items displayed in the action list drop down vary depending on whether actions are associated to an inspection item/type or not.

The Inspections Items screen which allows the selecting of multiple items behaves differently depending on whether there are actions associated to the inspections item/type or not.

➤ **Comments Table and Lists (5.0.1)**

2 new screens in composer are available to build a comments table and associate comments to inspection items/type/guide sheet items.

1. Comments maintenance screen is used to add/edit/delete items in the new Comments table.
2. Comments For Inspections maintenance screen is used to associate/disassociate comments to inspection items/types.

The Inspections screen has now allows comments from this new comments table can be inserted into the comment field when editing/adding actions to inspection items.

The Inspection Items maintenance screen now includes 2 new buttons and both cause the new comments maintenance screen to appear.

1. Type Comment

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

### 2. Item Comments

The Inspections screen now has a new button Select Comment. This will display the list of comments for the inspection item/type. The list returned and the operation of the select multiple button depend on whether comments are associated to the inspection item/type or not.

#### ➤ **Guide Sheets for Inspection Items (5.0.1)**

A guide sheet is a unique predefined list of parameters/tasks for an inspections item. A new Guide Sheet maintenance screen has been added in composer used to build a guide sheet. You can associate an action list to a guide sheet item here or indicate that an action isn't required (therefore an action dropdown list or text entry box will not be displayed on the Inspections screen.

The Inspections screen now allows you to display guide sheets and apply actions to guide sheet items.

A Guide Sheet button has been added to the Inspection Items maintenance screen to display the new Guide Sheet maintenance screen.

The Inspection Items screen has a new tag to display guide sheets for an inspection item.

#### ➤ **Guide Sheet Item Status Script Command (5.0.1)**

A new script command STAT\_GS returns the status of a guide sheet item associated to an inspection item for an A/P/D. You specify the inspection item in field1 and the last action entered is returned in field2 and the date of the last action is returned in field3.

Hi is true if the guide item is associated to the permit and EQ is true if the guide item has entries.

A new system standard field GuideSheet\_Id (not a database field) is available while running script and holds the guild sheet item it.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

### ➤ **Action Applies To Checkbox**

To limit the actions that appear in the Actions dropdown list to only those that apply, on the Actions table maintenance screen there is now a new frame of checkboxes. There are 4 checkboxes in the frame for Inspections, Approvals, Conditions, and Guide Sheets. All 4 will be checked by default when adding new actions (and also for actions existing prior to this enhancement).

The Inspections, Approvals and Conditions screens now support Applies To.

### ➤ **Initialize Activities from Parcel Sets (5.0.4)**

Changes in set processing allow the initializing of activities from the Parcel Sets toolbar so that activities can be created for each parcel in the set. An Initialize Activities button is now included on the parcel sets toolbar. This button displays a dialog screen that lets you decide whether to initialize activities for parcels that have Locks or Holds on them or to put those in a temporary parcel set (with a user defined name) for those. These options are also available for inactive or retired parcels.

Each activity that is created is put in a temporary activity set with a user supplied name.

The Initialize Activities maintenance screen now supports initializing activities from the Parcel Sets toolbar. Parcel, Address, Owner, Activity Number, Inherit Project and Activity are all disabled on the initialization screen from the Parcel Sets toolbar. There is a workflow options dialog to deal with compositions that have workflows associated with them.

### ➤ **User Dialog Script Command Returns Data (5.0.4)**

A new script command INPUT displays a user dialog and returns a user entered text, y/n, date, number or money data item or a value of a column selected from a user-defined drop-down list. In field 1 you specify the message to display. A dialog box header can be specified by entering it in Extra Data. The data returned is put into the item specified in field 2. The data type of this field determines the type of entry allowed on the user dialog. For drop down lists the list name is specified in Field and its type must match that of Field 2. Indicators Hi LO and EQ are used to check if user cancelled the operation or pressed OK and if the data or data type is invalid.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **More Button for Parcel Locs , Address Locs and A/P/D People Screen (5.0.4)**  
These screens now have a MORE button. When pressed on the Parcel Loc screen the Address toolbar is loaded for that address. On the Address Loc screen the MORE button displays the Parcel toolbar for that parcel. On the A/P/D people screen the button loads the C/A/E/D toolbar for that C/A/E/D.

- **Mileage and Vehicle Id for Inspections (5.0.7)**  
Begin, End and total mileage fields have been added to the inspection screen as well as a vehicle id field. The vehicle id can be pulled from a drop down list (called !SYSAUTO).

There is also a new .ini file entry “PreserveInspDetl=True” that if set will auto populate the begin miles and begin time fields when the “Add Entry” button is clicked. These will be populated with the previous end miles and end time.

- **Script Command Returns Inspections Mileage and Time – DETL-IN (5.0.7)**  
A new script command DETL-IN returns the total mileage and total elapsed time for inspection actions. You can specify an optional inspection item in field2 or date range in field2 and field3 to limit the total mileage and elapsed time to certain inspection items or date range for that action item. There are 2 new system standard fields that return the total mileage and elapsed time. They are Mileage and Minutes.

- **Guide Sheet Item Actions from User Defined Lists (5.0.7)**  
This new feature applies actions to guide sheet items from the item value column of the user defined list defined as a drop down list. The list items must be a max of 8 characters. The Guide Sheet Maintenance screen now supports assigning a user-defined list as an action entry type. And selecting it enables the Select List button. Pressing this new button causes the User Defined List Maintenance screen to display which has been modified to support selecting a list for use as an action entry type.

The inspection items screen supports assigning user-defined list items as a guide sheet action.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- **Street Name Searching on Valid Street Names Screen (5.0.7)**

On the valid street names screen you can search for a street name beginning with some specified characters or containing some specified characters.
  
- **Work Description on Requests For Inspections Screen (5.0.7)**

A work description field has been added to the Request for Inspection screen. The entire work description is visible on this screen. A new [OPTIONS] ini file setting REFshowWorkDescription= nn has been added to allow this. The nn is a number between 40 and 128 to indicate the text width of the scrollable balloon text.
  
- **User/Category Security for Find A/P/D List by Numbers (5.0.7)**

To restrict APD's with pre-defined prefixes/categories from showing up when searching using List By Number for certain users the Admin module has a new menu item Restricted Categories. Here you can enter the prefixes and categories pair to restrict a user from seeing separated with a ; (prefixes are not required for a category and if don't enter a prefix, omit the ;).

Separate each prefix/category with a comma and press update when done.

Also in Admin the User Default screen has been changed to include a check box. When checked the user is excluded from category restrictions set up. Press update after checking this. Now the user will appear in the excluded users list on the new Admin menu item screen. (Excluded user can be removed from this list on the new menu item screen).
  
- **Enhanced Printer Dialog Support for Docs Plus Documents (5.0.12)**

Document processing now has a new common printer dialog that supports printer names over 32 characters and provides additional printer settings such as paper bin and size as well as duplex and print quality settings (if your printer/printer security supports them). These settings temporarily override your windows printer setup utility settings.

To see this dialog a new [OPTIONS] ini setting UseCommonPrintDialog=True has been added.
  
- **Report 311- Accessed Fee Extract to ASCII File (5.0.12)**

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

A new report extracts assessed fee details to an ASCII file for accounting programs to use. A configuration file (.txt file) defines the record format of the file (see Permits Plus 5.0.xx features document). Activities can be filtered by date/time, composition type, status, an activity set for those dates, types and status. An option to generate unique output file names by adding date/time to the file name exists (or you can let the file just be overridden with the same name). The file gets placed in the same location as the configuration file and is given the same name as the configuration file with an extension of .out.

In the ROWS /ROWS section you define the source data reported on a record for the APD. You do this using ROW command.

In the ROW command the items specified include:

1. User-defined or APD system date item AKA\_NAME.
2. C or D - to specify whether to include the sign in the Credit/Debit column and in the total Credit/Debit columns.
3. Value\_Aka\_Name – to optionally specify a user-defined or system data items AKA\_NAME.
4. IncludeZero or ExcludeZero - specify whether to include or exclude the row when Lookup\_aka\_name value is 0.

Listed below are data items and features for the report:

- Total number and value of debits and credits for the activity and grand totals for all activities.
- Ability to set the number of decimal places in debit and credit fields.
- Ability to print a summary file (extension of .sum) that you can put the total number of and value of debits and credits into. The SUMMARY /SUMMARY section is used for this.
- Address details.
- System standard field from !STDAPD referring to data from APD\_BASE and user defined fields are placed in the SOURCE:=APD /SOURCE section. Ie Date\_B, TYPE, APD\_NO, WORK\_DEDC etc. can be specified.
- Parcel system and user data for primary parcel associated with APD. The system standard fields !STDPAR referring to data in PAR\_BASE

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

such as Parcel\_no, Tax\_Map etc can be used in the SOURCE:=Parcel /SOURCE section.

- People data for the Primary person associated to the APD for a specified relationship such as Relationship, Name, Phone\_1, License\_no and Address\_1 etc fields are specified in the SOURCE:=PEOPLE /SOURCE section. Only 1 people relationship per configuration file.
- Can change the formatting of the output file (ie delimited characters, widths)
- Data formatting and text manipulation features (see documentation).
- Lookups can be performed within the Lookup /Lookup section.

### ➤ **Report 310- Fee Payment Extract to ASCII File. New Commands (5.0.12)**

The ROWS, ROW and ROW-VOID commands have been added to the configuration file for Report 310. Row defines the source data reported on for and APD. ROW\_VOID defines the source data that will be reported on a record for an APD when the transaction for a lookup\_fee\_item is a VOID transaction.

In the ROW and ROW\_VOID the items specified include:

1. Lookup\_Fee\_Item – which is the fee item number (literal or data item)
2. C or D - to specify whether to include the sign in the Credit/Debit column ans in the total Credit/Debit columns.
3. Value\_Aka\_Name – to optionally specify a user-defined or system data items AKA\_NAME.

A new option OnVoid:= has been added to the LOOKUP command and will cause the system to switch to an alternate lookup list when the fee item being processed is a void transaction.

Listed below are data items and features for the report:

- Total number and value of debits and credits for the activity and grand totals for all activities.
- Ability to set the number of decimal places in debit and credit fields.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

- Ability to print a summary file (extension of .sum) that you can put the total number of and value of debits and credits into. The SUMMARY /SUMMARY section is used for this.

### ➤ **Schedule Inspections Automatically By Inspection Type (5.0.12)**

All the inspections requests of the same type can be scheduled in one operation. When the Schedule by Type checkbox on the Request for Inspections Entry screen is checked and the new ini settings have been set in the [OPTIONS] section, these rules apply when scheduling inspections:

- Only 1 type of inspection can be selected at a time.
- Approved inspections will not be selected automatically for scheduling. To reschedule select them first and respond to message box.
- RFIscheduleByTypeType=n can be set to 0 1 or 2. 0 to disable this feature 1 to set it on but allow user to uncheck the checkbox and 2 to not allow the user to uncheck the checkbox (all inspections of the same type must be scheduled).
- RFIscheduleByTypeOptions=n can be set to 0 so that items are not scheduled if they are already scheduled for requested date and 1 to not schedule if they are already scheduled for the requested date AND time.
- RFIscheduleByTypeFromScripts=true for inspection scheduled by script processing trigger Schedule by Type processing. All inspections associated to the APD of the same type are also scheduled.
- A calendar is selected based on the inspections weights (number of minutes) assigned to the 1<sup>st</sup> inspection selected not on the total weight of the inspections items that are automatically selected.
- All selected inspections are scheduled on the same calendar for the same date and time. The total weight (or number of minutes) of all the inspections are applied to the allocated minutes of the calendar that they are scheduled to and may cause the calendar to become over scheduled for that day.

### **Associate Source A/P/D when Inheriting A/P/D Items during Initialization (5.0.12)**

When inheriting APD initialization items users now can associate the source APD as the parent to the APD being initialized. (Not available when using Copy project or development). This is done by setting the new [OPTIONS] ini setting AssociateInheritAPD=True and then checking the new Associate Inherit APD checkbox on the Copy APD options screen.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

Note: When inheriting APD initialization items from multiple sources the last source PD selected will be the parent.

- **Apply Partial Payments to Set Members when Paying Specific Item(s) (5.0.17)**

Users can now use partial payments to specify the payment amount to be applied to specific items during set fee processing. Each set member with that fee item will receive the payment amount specified if the balance is at least that amount. A Partial Payments for Set Members checkbox has been added to the Partial Payment for Set members screen for this purpose. Those less than the payment amount will appear on an exceptions screen.
  
- **RFI\_DETL's "Request" Field Expanded from 40 to 100 characters (5.0.20)**

Users can now enter up to 100 characters into the requests for inspections entry screens comments field. This also applies to Datex IVR (Connect) module in the rr field for packet 3 and 31. ConnectSupressReqInspNo=True in the [OPTIONS] sections of the ini file will suppress the inspection request number from being appended to the text in rr for packet 03 and 31.
  
- **Inspections Screen Items Grid Shows Date of Last Action Entered (5.0.20)**

The DoInspectIncludeLatestDate = n (n is a number from 1 – 8) has been added to the [OPTION] section of the ini file to include the last date entered on the Inspection Items screen. The number represents the column position in the Inspections items list in which to display the latest date.
  
- **Create Relationships from Set Members (5.0.20)**

New functionality allows you to relate set members (a relationship can be created for each member of a set). If a parent activity has lock however, no relationship entries will be created. A relate button now appears on the set member processing toolbar screen. When clicked this displays the Relate Set Members screen. Depending on whether the parent activity is a development or a project the proper Options radio button is enabled. For a parent that is a development, projects can be related to it. For a parent that is a project, activities can be related to it.

# PERMITS PLUS VERSION UPGRADE

---

## Features Detail

Exceptions are listed and can be printed using the print button after the execute button has been clicked.

Other relationships may be a mix of APDs and the Other Relationships relationship type is independent of the hierarchy and entries will be created for each set member.

➤ **Display Sub Type on Relationship Screens (5.0.20)**

The sub type has been added to the relationships screen. The DoRelatesIncludeSubType=n is a new [OPTIONS] ini setting where n is a number from 1 to 5 that represents where on the grid the sub type field will display.