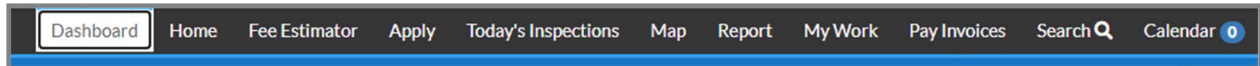


Dashboard

The Civic Access Dashboard provides the ability for users to see a visual representation of aggregated data. It displays data about permits, plans, inspections, and invoices. Users can access saved drafts of submissions and add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the registered user.

1. To access the Dashboard, click **Dashboard** in the menu on the Home page.



The Dashboard displays.

My Permits

| | | | | |
|---|---|--|---|---|
| Attention 60 <ul style="list-style-type: none"> Building Comm... 45 Residential Build... 14 In-Ground Pool 1 | Pending 99+ <ul style="list-style-type: none"> Building Comm... 101 Residential Build... 10 Other 3 | Active 30 <ul style="list-style-type: none"> Residential Build... 26 Building Comm... 4 | Draft 3 <ul style="list-style-type: none"> Commercial Build... 1 Garage Permit 1 Residential Accesso... 1 | Recent 18 <ul style="list-style-type: none"> Building Comm... 17 Electrical (Non-Ra... 1 |
|---|---|--|---|---|

[View My Permits](#)

My Plans

| | | | | |
|---|--|---|--|--|
| Attention 8 <ul style="list-style-type: none"> Abandonment - Eas... 6 Annexation - Annex... 1 PUD - Prelim 1 | Pending 6 <ul style="list-style-type: none"> Abandonment - Eas... 4 Annexation - Annex... 1 PUD - Prelim 1 | Active 0 | Draft 0 | Recent 1 <ul style="list-style-type: none"> Business License Re... 1 |
|---|--|---|--|--|

[View My Plans](#)

My Licenses

| | | |
|---|--|--|
| Expired 84 <small>DAYS</small> <ul style="list-style-type: none"> Oh My Dawg Hotdogs VIII No. SEC-72-000059-2021 Type: Accommodation and ... Review | Expires in 294 <small>DAYS</small> <ul style="list-style-type: none"> Amber's Jewelry Paradise No. SEC-72-000060-2022 Type: Accommodation and ... | Draft 0 |
|---|--|--|

[View My Licenses](#)

My Inspections

| | | |
|---|--|---|
| Requested 0 | Scheduled 14 <ul style="list-style-type: none"> Footing 8 Recurring Fire... 6 | Closed 1 <ul style="list-style-type: none"> Foundation W... 1 |
|---|--|---|

[View My Inspections](#)

My Invoices

| | | |
|--------------|-----------|--|
| Current | 0 | \$0.00 |
| Past Due | 27 | \$38,128.94 Add To Cart |
| Total | 27 | \$38,128.94 Add To Cart |

[View My Invoices](#)

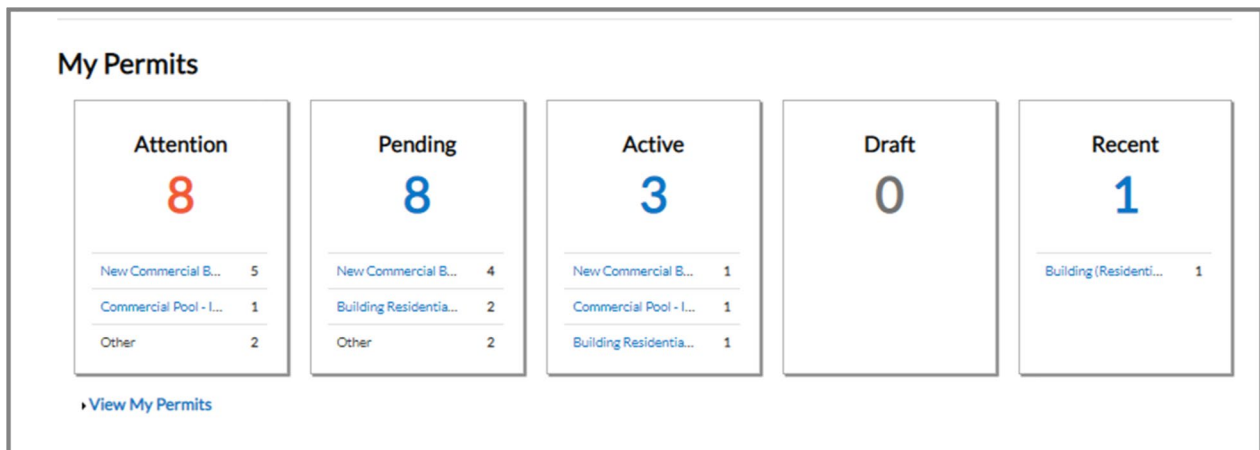


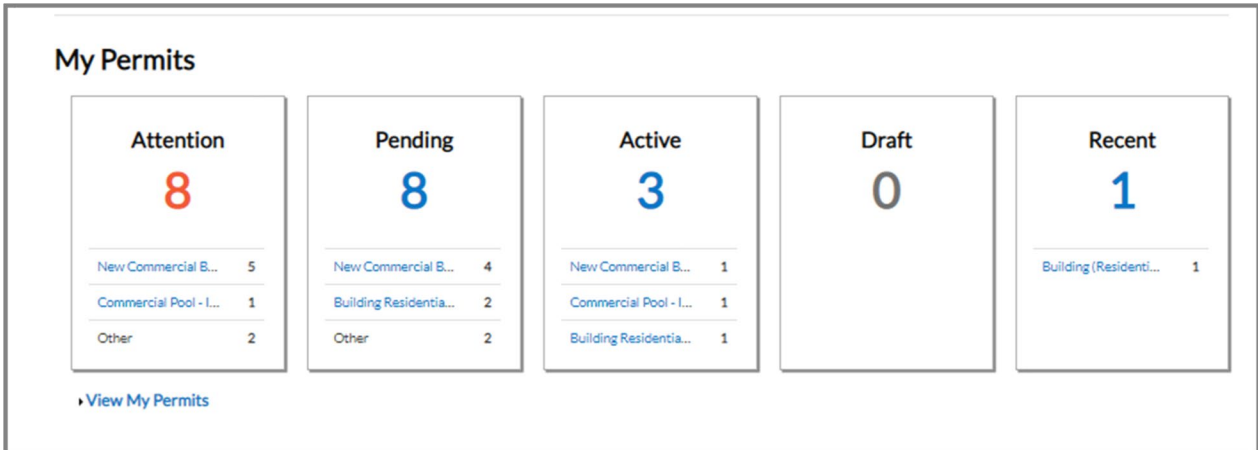
To use the Dashboard:

1. Click **Draft** in the **Permits** or **Plans** section to view saved Permit or Plan application drafts.
2. Click the appropriate **status card** in the **Permits** section to view a list of the corresponding Permits. Beneath each status is a breakdown of the Permit Types. Click **View My Permits** to view all Permits.
3. Click the appropriate **status card** in the **Plans** section to view a list of the corresponding Plans. Beneath each status circle is a breakdown of the Plan Types. Click **View My Plans** to view all Plans.
4. Click the appropriate **status** in the **Inspections** section to view a list of the corresponding Inspections. Beneath each status is a breakdown of the Inspection Types. Click **View My Inspections** to view all Inspections.
5. Click **Add to Cart** next to **Current**, **Past Due**, or **Total** in the **My Invoices** section to add the corresponding Invoices to the Shopping Cart. Click **View My Invoices** to view all Invoices.

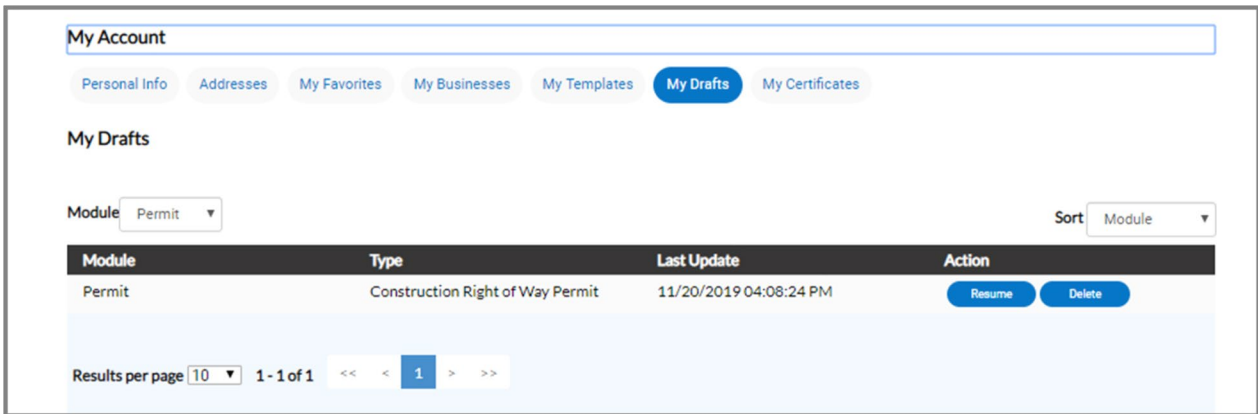
Permits

1. **Attention:** By clicking the **Attention** status from the **Dashboard**, the user be given a list of all Permit Numbers that have been applied for that have a status of Attention, Project name, Address attached to the Permit, Type, Status, and the Reason that the Permit needs the citizen's attention. Criteria for the Attention status is: Active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a completed status.
2. **Pending:** By clicking the **Pending** status from the **Dashboard**, the user be given the list of all permit numbers that have been applied for that have a status of Pending, Project name, Address attached to the Permit, Type, Status, and Reason. Criteria for the Pending status is no issue date, final date, nor an expire date.





- Active:** By clicking the **Active** status from the **Dashboard**, the user be given the list of all permit numbers that have been applied for that have a status of Active, Project name, Address attached to the Permit, Type, Status and Reason. Criteria for the Active status: either has a status of issued or has an issued date and does not have a completed status.
- Draft:** By clicking the **Draft** status from the **Dashboard**, the user be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete, and action may resume at any point in time. They may also be deleted from this page if they are no longer needed.

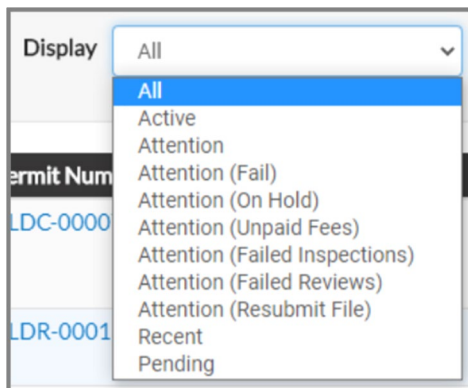


5. **Recent:** By clicking the **Recent** status from the **Dashboard**, the user be taken to the **My Work** Tab. The user can select from a list of all Permits for which they have applied that have a status of Recent, Project name, Address attached to the Permit, Type, Status, and Reason. Criteria for the Recent status is has been applied for in the last 30 days.

NOTE Success, failure, issued, on hold, or cancelled statuses deal with how a status is flagged in setup pages. This does not mean that the status on a case is called Success, Failure, Issued, On Hold, or Cancelled.

| Permit Number | Project | Address | Permit Type | Status | Attention Reason |
|------------------|---------|--|-----------------------------------|----------------------------|------------------|
| BLDR-000353-2021 | | 900 Turnbridge Cr Naperville, IL 60540 | Building (Residential) - Addition | Attention, Recent, Pending | Unpaid Fees |

6. **Display:** This dropdown allows the citizen a way to organize and select one **Status** to view.



7. **Select Case Type:** This field allow the citizen to type in a specific Case Type. As the case type name is typed in the field common results display to select.

| Select Case Type | resident |
|---|---|
| Address | |
| 1204 TREFOIL CT NAPERVILLE, IL 60563 | Building (Non-Residential) - New Construction |
| | Building (Residential) - Addition |
| | Building (Residential) - New Single Family |
| | Electrical (Non-Residential) - Alteration |
| | Electrical (Non-Residential) - New Construction |
| | Electrical (Residential) - New Construction |
| 13 S Main St Naperville, IL 60563 | Mechanical (Non-Residential) - Alteration |
| | Mechanical (Non-Residential) - New Construction |

8. **Sort:** This dropdown allows the citizen a way to sort by **Relevance, Permit Number, Project, or Address.**

Sort: Relevance ▼
Relevance
Permit Number
Project
Address

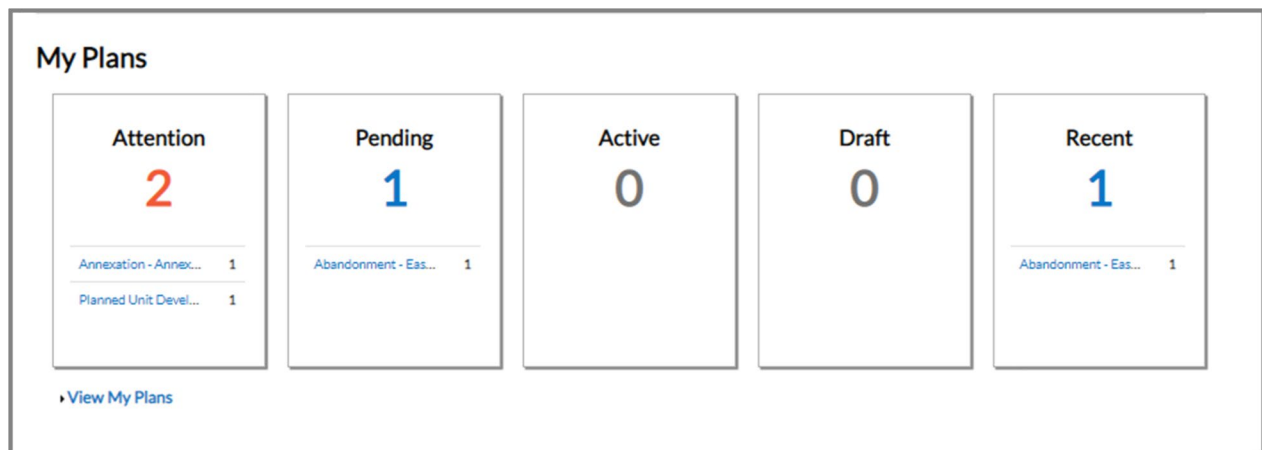
9. **Search Box:** This box allows the citizen a way to search by **Permit Number, Project name, or Address** by typing in the information in the box and clicking **Enter** on the keyboard or by clicking the **Search** button.

Search for: 13 S Main Exact Phrase



Plans

1. **Attention:** By clicking on the **Attention** status from the **Dashboard**, the user be given a list of all Plan numbers that have been applied for that have a status of Attention, Project name, Address attached to the Plan, Type, Status, and the Reason that the Plan needs the citizen's attention. Criteria for the Attention status is: Active holds, unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a successful status.
2. **Pending:** By clicking on the **Pending** status from the **Dashboard**, the user be given the list of all Plan Numbers that have been applied for that have a status of Pending, Project name, Address attached to the Plan, Type, Status and Reason. Criteria for the Pending status is statuses for the case are not success, failures, on hold or cancelled.
3. **Active:** By clicking on the **Active** status from the **Dashboard**, the user be given the list of all plan numbers that have been applied for that have a status of Active, Project name, Address attached to the Plan, Type, Status and Reason. Criteria for the Active status is the status is successful.
4. **Draft:** By clicking on the **Draft** status from the **Dashboard**, the user be given the list of all Permits and Plans that have been saved, but not submitted for review. These drafts may be incomplete, and action may resume at any point in time. They may also be deleted from this page if they are no longer needed.
5. **Recent:** By clicking on the **Recent** status from the **Dashboard**, the user be given the list of all Plan Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Plan, Type, Status and Reason. A Recent status indicates that a citizen applied for the Plan within the last 30 days.

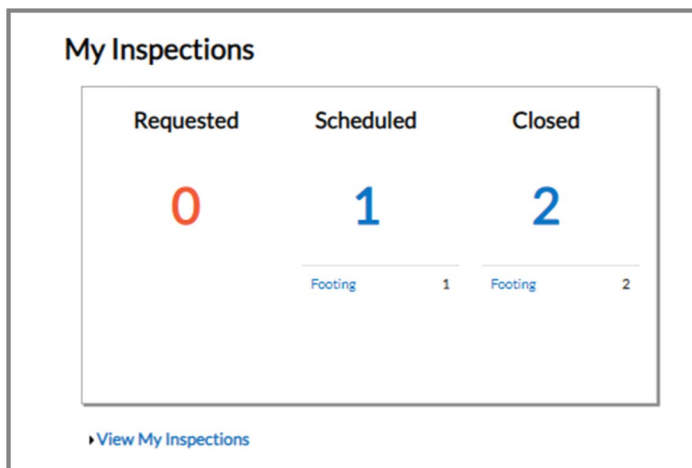


NOTE Success, failure, on hold, or cancelled status deal with how a status is flagged in setup pages. This does not mean that the status on a case is called Success, Failure, On Hold or Cancelled.



Inspections

1. **Requested:** By clicking on the **Requested** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Requested, Address attached to the Inspection, Inspection Type and Requested Date.
2. **Scheduled:** By clicking on the **Scheduled** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Scheduled, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.
3. **Closed:** By clicking on the **Closed** status from the **Dashboard**, the user be taken to the **My Work** tab to view **My Existing Inspections**. The user be given a list of all Inspection Case Numbers that have a status of Closed, Address attached to the Inspection, Inspection Type, Requested Date and Scheduled Date.



Invoices

Civic Access users can access invoices that are paid, voided, or unpaid. Invoices are accessible from the **Dashboard** and the menu system and can be added to the electronic shopping cart. Civic Access's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.

1. **Current:** By clicking **Add To Cart**, the citizen be able to access the Shopping Cart page where all current invoices are listed. The citizen may access the Invoice by clicking the Invoice Number or they may access the case by clicking the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, the user may click the **Check Out** oval to the right of the page. This takes the user to a payment page to complete the payment for the invoice(s).

| My Invoices | | |
|---------------|----------|-----------------------------|
| Current 0 | \$0.00 | Add To Cart |
| Past Due 5 | \$296.60 | Add To Cart |
| Total 5 | \$296.60 | Add To Cart |

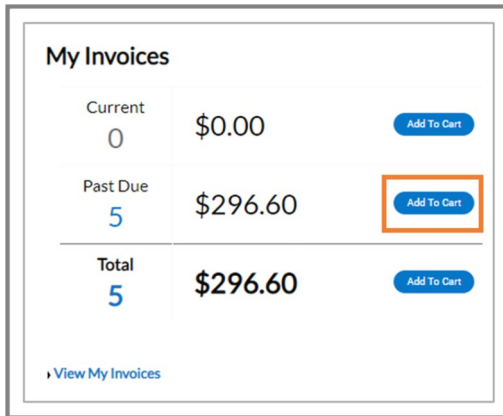
[View My Invoices](#)

| Shopping Cart | | | | Total |
|----------------------|---------|---|------------|---------------------------|
| | | | | \$296.60 |
| | | | | Check Out |
| Invoice: INV-0000395 | | Description: NONE | | \$1.65 |
| Due Date: 03/13/2019 | | Billing Contact: Tyler (Goss, Christy) | | |
| Case Number | Project | Case Address | Amount Due | Remove |
| BLDC-000718-2019 | | 900 Del Rio Avenue San Luis Obispo CA 93405 | \$1.65 | |

[Top | Main Menu](#)



2. **Past Due:** By clicking **Add To Cart** oval to the right of Past Due invoices, the citizen be able to access the Shopping Cart page where all past due invoices are listed. The citizen may access the Invoice by clicking the **Invoice Number** or they may access the Case by clicking the **Case Number**. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, click the **Check Out** oval to the right of the page. The payment page displays through which the citizen can complete the payment for the invoice(s).

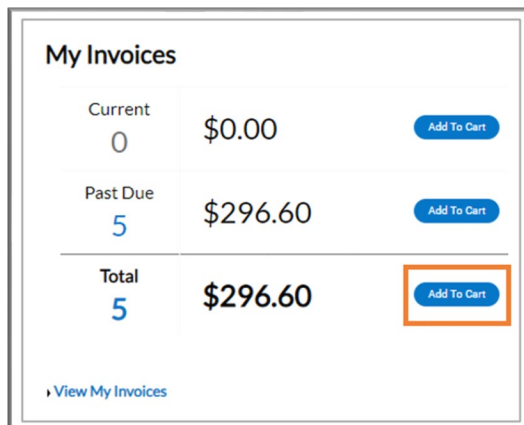


The screenshot shows a 'My Invoices' summary table. The 'Past Due' row is highlighted with an orange box around its 'Add To Cart' button.

| My Invoices | | |
|-------------|----------|-----------------------------|
| Current | \$0.00 | Add To Cart |
| Past Due | \$296.60 | Add To Cart |
| Total | \$296.60 | Add To Cart |

[View My Invoices](#)

3. **Total:** By clicking **Add To Cart**, the citizen be able to access the Shopping Cart page where all invoices are listed. The citizen may access the Invoice by clicking the **Invoice Number** or they may access the Case by clicking the **Case Number**. To remove an Invoice from the Shopping Cart, the citizen may click **Remove** to the right of the invoice. To checkout, click the **Check Out** oval to the right of the page. This takes the citizen to a payment page to complete the payment for the invoice(s).



The screenshot shows a 'My Invoices' summary table. The 'Total' row is highlighted with an orange box around its 'Add To Cart' button.

| My Invoices | | |
|-------------|----------|-----------------------------|
| Current | \$0.00 | Add To Cart |
| Past Due | \$296.60 | Add To Cart |
| Total | \$296.60 | Add To Cart |

[View My Invoices](#)

