EnerGov Citizen Self Service User Guide

Community Development - 2020.1

OVERVIEW

Citizen online access is a crucial part of community development software. The essential purpose of this application is to provide public-facing tools for citizens to use to interact with the EnerGov land management and permitting processes administered by local government municipalities. CSS is compliant with the Americans with Disabilities Act (ADA).

Contents

FEATURE LIST

This page briefly describes the features of EnerGov's Citizen Self Service product.

Feature	Help	Description
ADA Compliance		CSS and CSS Administration are Americans with Disabilities Act (ADA)-compliant at the WCAG 2.0 AA level. Numerous features are designed to make the site accessible to individuals with various impairments.
Application Security		CSS and CSS Administration come with powerful and professional security, CAPTCHA support for user registration, secure authentication, password strength indicators, case-sensitive credentials, and more.
Draft Saving		CSS users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.
Exception Handling		CSS Administration offers exception reports and tools for site administrators to view details about client- and server-side exceptions encountered within the environment.
GIS Maps		CSS integrates with ESRI map functionality. The maps allow for powerful searches, pinned results, EnerGov data incorporation, layers, filters, a legend, and more. The map is available to both logged in and logged out users.
Global Search		Citizens can perform robust searches across several key areas in CSS (i.e., permits, plans, inspections, and addresses) from 1 centrally accessible location.
Invoice Management		CSS users are able to 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.
Menu System		CSS offers powerful and flexible parent and child menu systems. Administrators can configure menu items, menu item categories, menu item positions, and menu item visibility.
Metric Dashboards		Visual dashboards in CSS display data that is contextual to the logged in user. The dashboard communicates the statuses and counts of several key items (i.e., permits plans, inspections, and invoices).
Mobile Capabilities		The fully functional CSS and CSS Administration sites can be accessed on mobile devices without having to install or configure any mobile applications. The sites adjust to screen sizes automatically.
Overall Architecture		CSS and CSS Administration leverage the latest Microsoft technologies, HTML 5, and solid performance. The sites can be hosted or on premise. APIs are available for purchase to extend functionality.

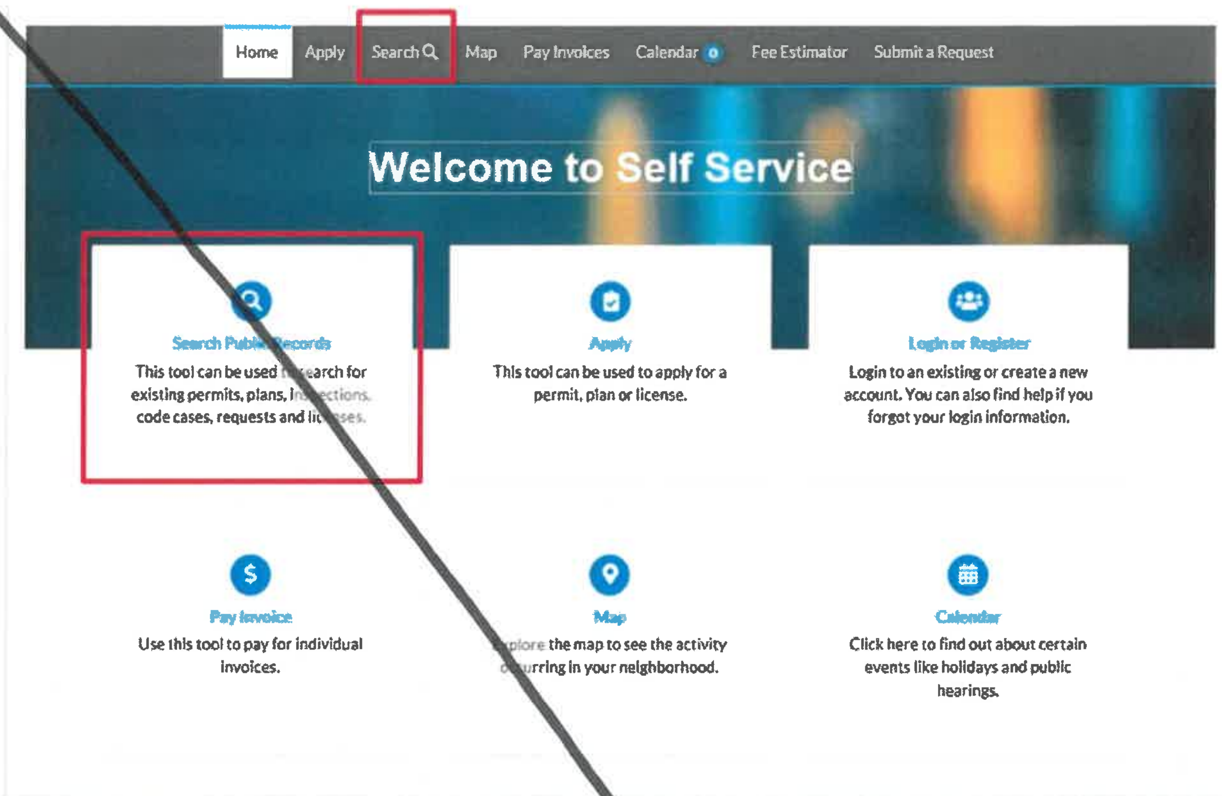
Permits & Plans		Core CSS functionality allows permits and plans to be viewed online.
Printable Reports		Printable reports are available in CSS and CSS Administration. Examples include permits and invoices. These documents can be printed and/or saved to PDF on demand based on business rules.
Public Notifications		Site administrators can create public notifications (e.g., site maintenance, public hearings, job fairs, events, etc.) through CSS Administration. Notifications are displayed on CSS's Home and Dashboard pages.
Request Inspections		CSS users are able to request inspections. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.
Shopping Cart		CSS's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.
System Admin Tool		CSS Administration is a web tool, separate from CSS, that is used to perform a variety of configurations: headers, footers, payments, maps, permit types, plan types, menus, categories, notifications, and more.
User Registration		CSS user registration includes several key features: user profiles, user account registration, password retrieval, automatic EnerGov global entity recognition, secure authentication, and more.

CSS HOME SCREEN AND MAIN MENU BAR

The CSS Home screen and main menu bar may have different tabs and boxes configured by the municipality. Some of the menu bar options are: Apply, Map, Report, Fee Estimator, Pay Invoices, Search, Calendar, and Help. The boxes thay may display are Search Public Records, Apply, Login or Register, Pay Invoices, Map, Calendar, Request Inspection, Estimate Fees, or a custom box set up by the municipality.

An example of a CSS Home screen appears on the next page. One of the options that can be performed prior to logging in are explained after it. Many of the other options are the same for the logged in user and will be explained throughout this guide.

Note: The Home screen, Welcome page and Dashboard may be configured differently than what is shown in the User Guide. Please see the CSS Administration Guide on how to configure the screens.



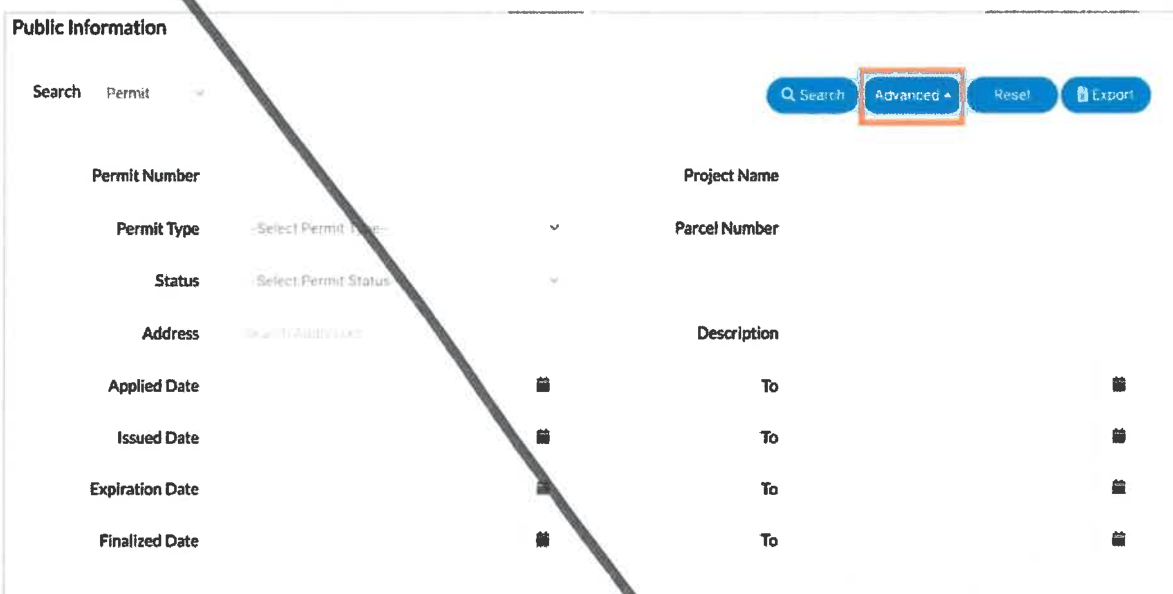
SEARCHING PUBLIC RECORDS WITHOUT LOGGING INTO CSS

On the CSS home page, users have access to public information without being logged in.

To perform a Global Search, the User can click the Search option on the main menu bar, or click on the Search Public Records Box. Leaving the dropdown as ALL will search through all EnerGov Records for the word(s) typed in the box.

Selecting another option in the Search drop down and clicking the Advanced button, will bring up additional fields with which to perform a search. See the Search fields below:

Search Permits



Not all fields need to be utilized, and any combination can be used.

1. Type at least part of the permit number to search for in the **Permit Number** field.
2. Type at least part of the name of the project associated to the permit to search for in the **Project Name** field.
3. Select the type of permit to search for from the **Permit Type** dropdown.
4. Select a **Status** from the dropdown for the Permit.
5. Type the parcel number or a part of the Parcel number associated to the Permit within the **Parcel Number** field.
6. Type at least part of the address associated to the permit to search within the **Address** field.
7. Type any words that might appear in the description of the permit in the **Description** field.
8. Type a range of permit application dates to search for permits within the **Application Date** and **To** fields, or click the calendar buttons to select the dates.

9. Type a range of permit expiration dates to search for permits within the **Expire Date** and **To** fields, or click the calendar buttons to select the dates.
10. Type a range of permit finalization dates to search for permits within the **Finalized Date** and **To** fields, or click the calendar buttons to select the dates.
11. Click *Search* to display a list of results that meet the search criteria.
12. Click *Reset* to clear the entered search criteria.
13. Click *Advanced* to hide the search criteria.
14. Click *Export* to export the results into a specified document.

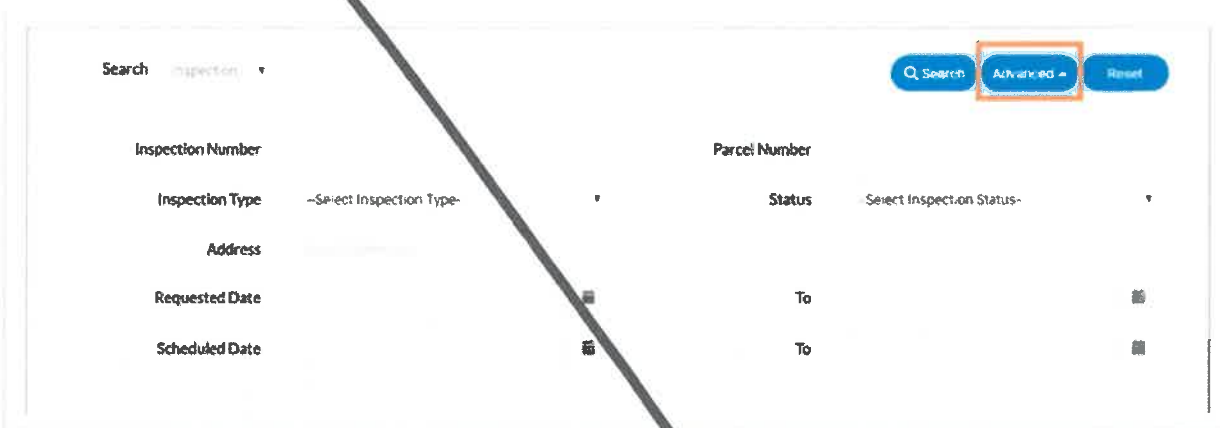
Search Plans

Not all fields need to be utilized.

1. Type at least part of the plan number to search for in the **Plan Number** field.
2. Type at least part of the name of the project associated to the plan to search for in the **Project Name** field.
3. Select the type of plan to search for from the **Plan Type** dropdown.
4. Type the parcel number or a part of the Parcel number associated to the Plan within the **Parcel Number** field.
5. Select a **Status** from the dropdown for the Plan.
6. Type any words that might appear in the description of the plan in the **Description** field.
7. Type at least part of the address associated to the plan to search for in the **Address** field.

8. Type a range of plan application dates to search for plans within the **Applied Date** and **To** fields, or click the calendar buttons to select the dates.
9. Type a range of plan application dates to search for plans within the **Completion Date** and **To** fields, or click the calendar buttons to select the dates.
10. Type a range of plan application dates to search for plans within the **Expiration Date** and **To** fields, or click the calendar buttons to select the dates.
11. Click *Search* to display a list of results that meet the search criteria.
12. Click *Reset* to clear the entered search criteria.
13. Click *Advanced* to hide the search criteria.

Search Inspections



Not all fields need to be utilized.

1. Type at least part of the inspection number to search for in the **Inspection Number** field.
2. Type the parcel number or a part of the Parcel number associated to the inspection within the **Parcel Number** field.
3. Choose from the dropdown the **Inspection Type**.
4. Select a **Status** from the dropdown for the inspection.
5. Type at least part of the address associated to the inspection to search for in the **Address** field.
6. Type a range of inspection request dates to search for plans within in the **Requested Date** and **To** fields, or click the calendar buttons to select the dates.
7. Type a range of inspection schedule dates to search for plans within in the **Scheduled Date** and **To** fields, or click the calendar buttons to select the dates.

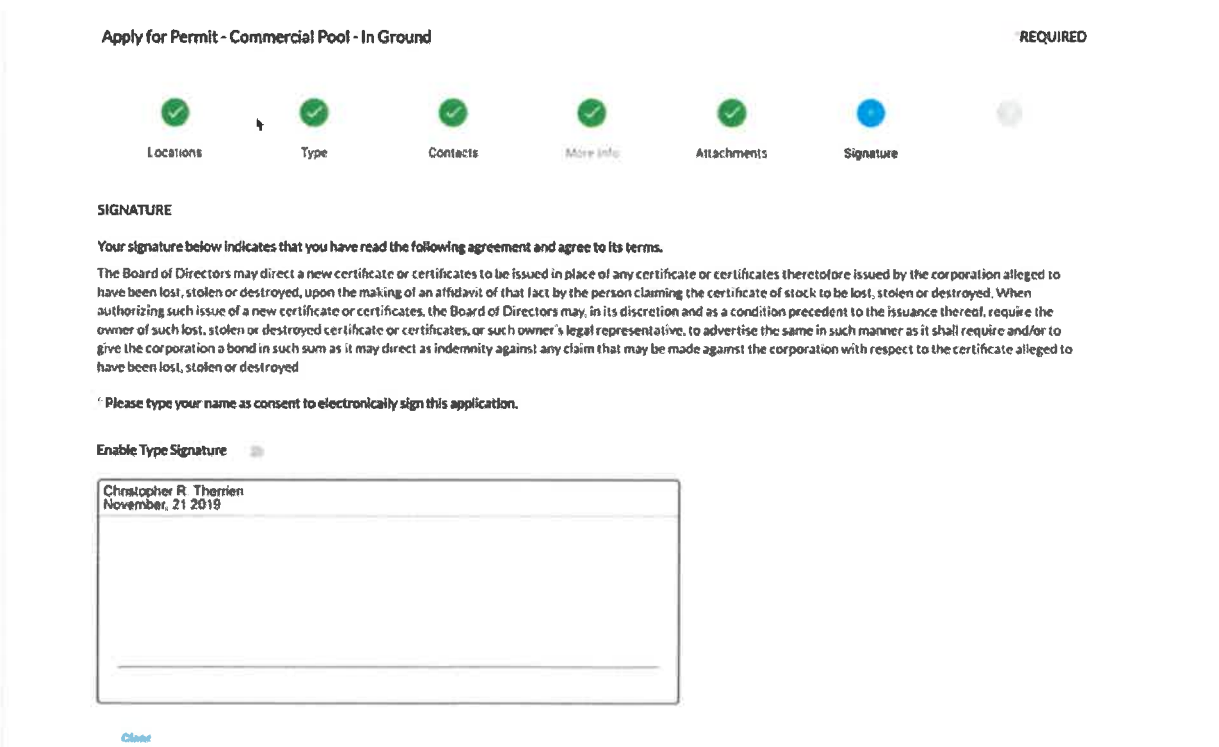
8. ~~Click *Search* to display a list of results that meet the search criteria.~~
9. ~~Click *Advanced* to hide the search criteria.~~
10. ~~Click *Reset* to clear the entered search criteria.~~

~~If other Search options appear, such as Code Case, Request, or License, fill in the fields the same way to perform a search.~~

REGISTERING ON CSS

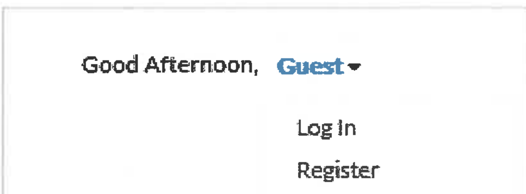
To register on CSS the user can click on the **Login or Register** box, and select Register. This will bring up a page that requires an email address. Once a valid email address is typed in the field and the **Next** button is clicked, a message will direct the user to check their email to complete their registration. Once that has been completed, they will be directed to a login page.

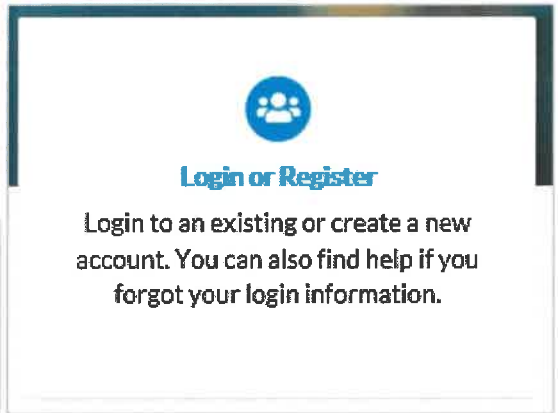
Electronic Signatures are available during the last step of the Registration process and/or during the Application process in CSS. The user may use their mouse to sign and , if needed, the process may be converted to an ADA option where the user may type their name.



LOGGING INTO CSS

To login to CSS, the user can click the Login or Register box on the Home page and they will be brought to the login page. Login is also an option from the greeting dropdown in the right hand corner above the menu bar.

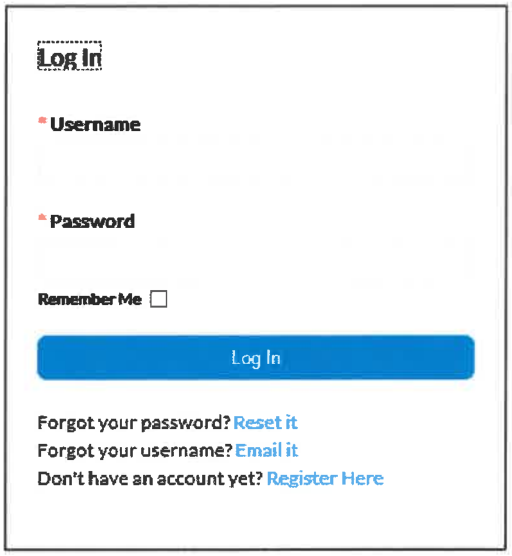




Follow the steps below to login to CSS:

URL = https://energovweb.pulaskicounty.org/Energov_Prod/SelfService

1. Navigate to the URL designated for your Citizen Self Service environment.
2. Enter your **Username** and **Password** in the fields provided. If you do not have an **Username/Password** already registered with CSS and EnerGov, click on Register Here and follow the directions to register for an account.
3. Mark the **Remember me** checkbox to have the system remember your credentials.
4. Click *Log In*. CSS validates your login and, if it is valid, opens CSS with the functions you are authorized to access.

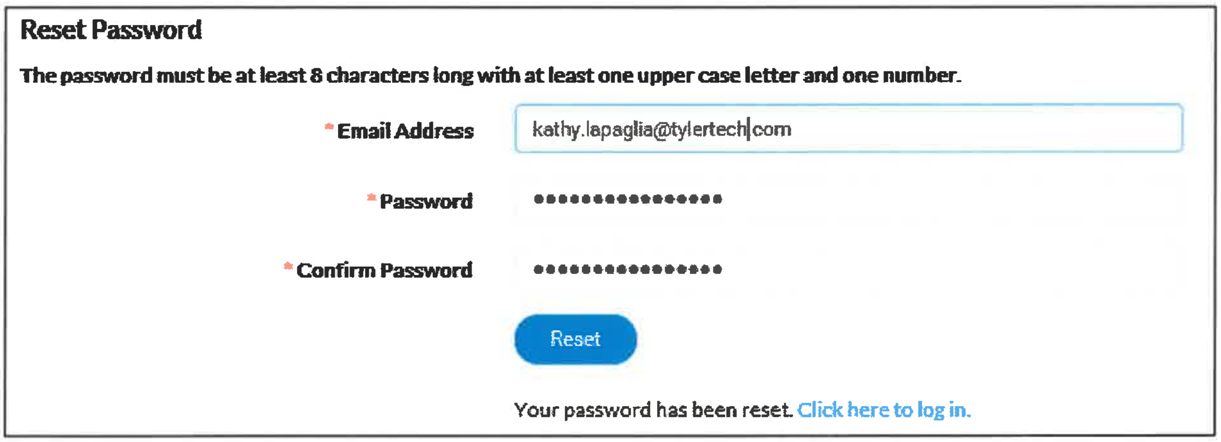


Logging in as a Registered User when you have forgotten your Username or Password.

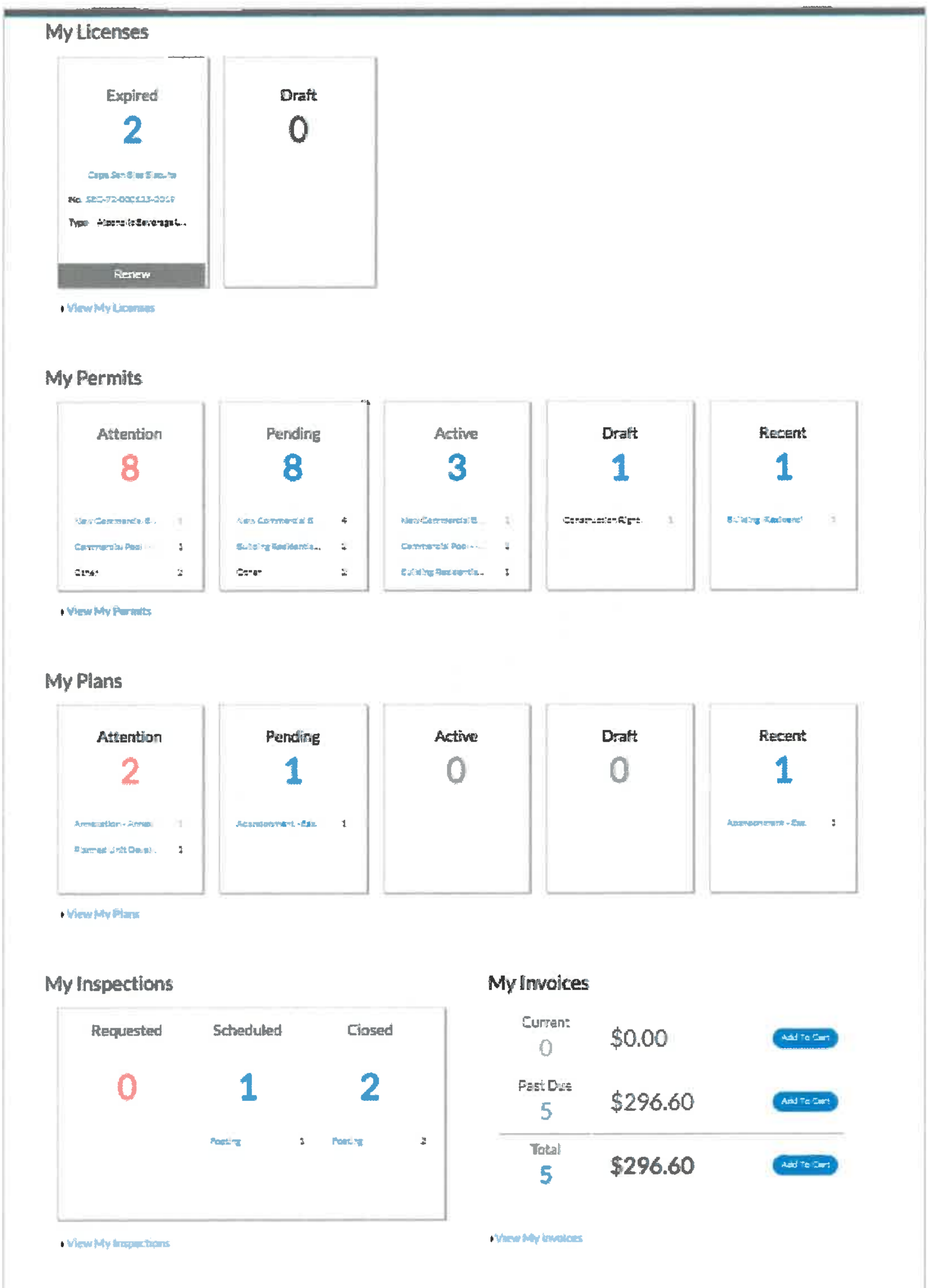
1. If you have forgotten your User name, click the ***Email It*** option below the **Log In** button. You will be redirected to a Forgot Username page. Fill in a valid email address in the field and click Submit. An email will be sent your Username in it. Then you can return to the login page and click *Log In* and input it.

2. If you have forgotten your Password, click the ***Reset It*** option below the **Log In** button. Fill in a valid email address in the field and click *Submit*. An email will be sent with directions on resetting your Password.

3. Open the email and click *Reset*.
4. You will be redirected to a CSS window where a new password can be entered and confirmed. Once confirmed, it has been reset, and you can login.



DASHBOARD

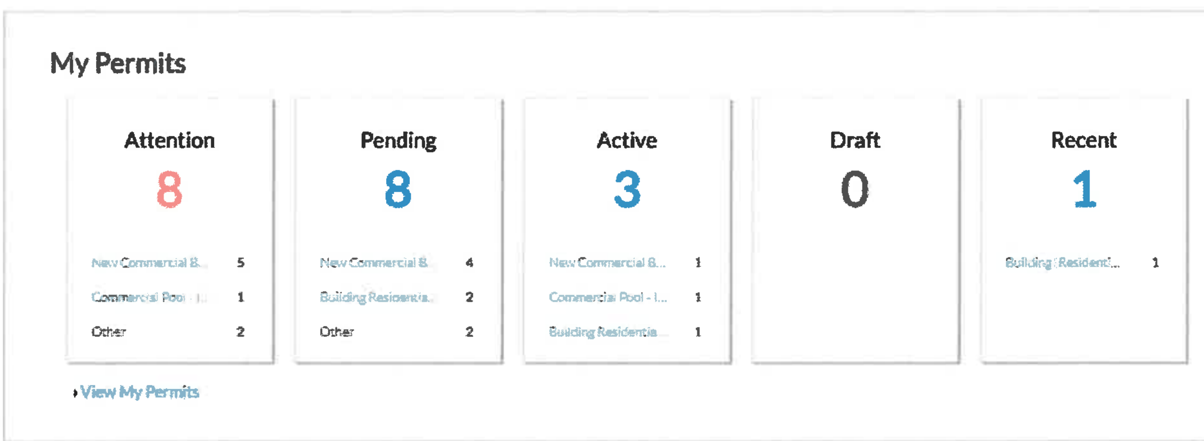

My Licenses
Expired
2
Renew
Draft
0
View My Licenses
My Permits
Attention
8
Pending
8
Active
3
Draft
1
Recent
1
View My Permits
My Plans
Attention
2
Pending
1
Active
0
Draft
0
Recent
1
View My Plans
My Inspections
Requested
0
Scheduled
1
Closed
2
View My Inspections
My Invoices
Current
0
$0.00
Past Due
5
$296.60
Total
5
$296.60
View My Invoices

CSS provides the ability for users to see a visual representation of aggregated data on the dashboard. Users can see data for permits, plans, inspections, and invoices. Users can click on the Draft circles to access saved drafts; users can also add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the logged in user.

Follow the steps below 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.

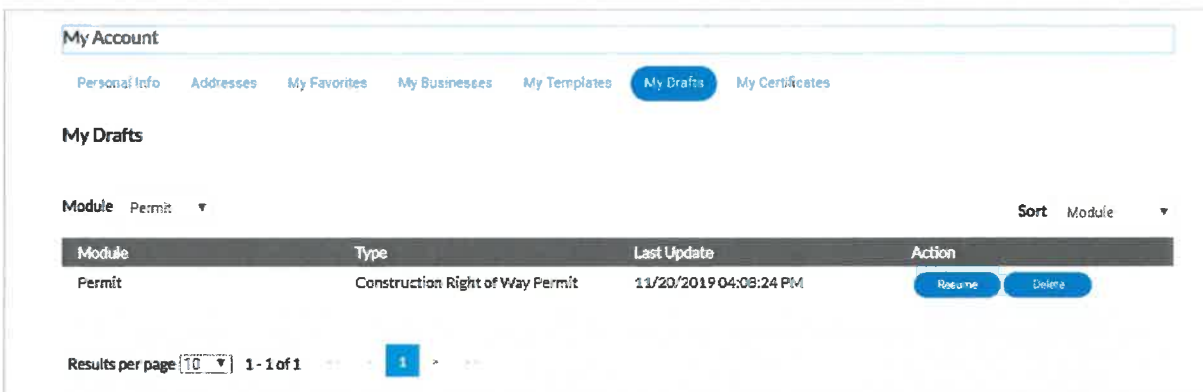
PERMITS



1. **Attention:** By clicking on the *Attention* status from the **Dashboard**, you will 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,

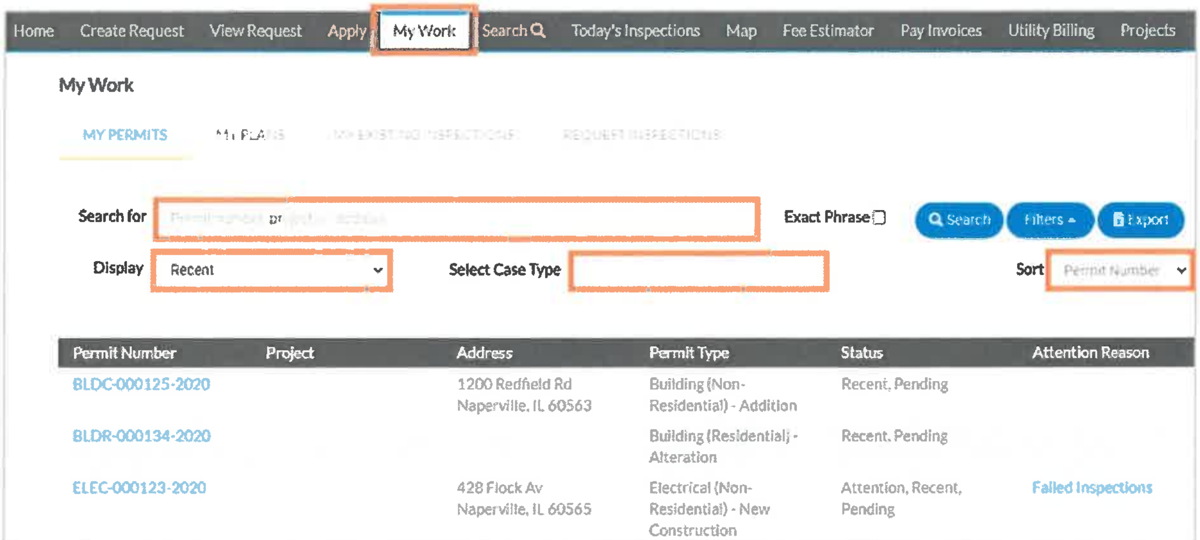
unpaid fees, failed reviews (submittals), failed inspections, eReview file resubmissions, and does not have a completed status.

2. **Pending:** By clicking on the *Pending* status from the **Dashboard**, you will 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.
3. **Active:** By clicking on the *Active* status from the **Dashboard**, you will 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.
4. **Draft:** By clicking on the *Draft* status from the **Dashboard**, you will 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 screen if they are no longer needed.

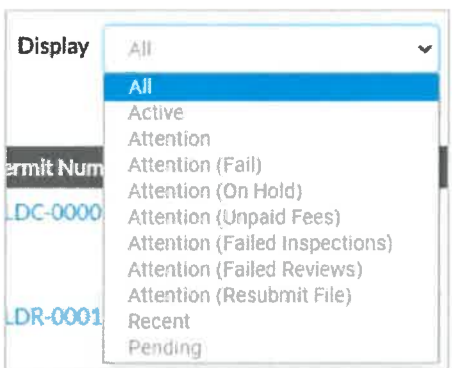


5. **Recent:** By clicking on the *Recent* status from the **Dashboard**, you will be taken to the **My Work** Tab. You will be given the list of all Permit Numbers that have been applied for that have a status of Recent, Project name, Address attached to the Permit, Type, Status and Reason. Criteria for the Recent status is: is has been applied for in the last 30 days.

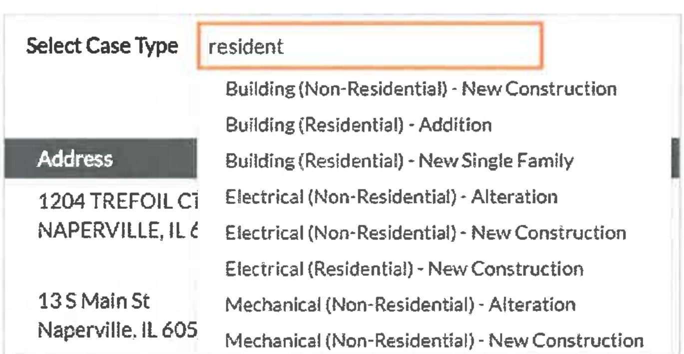
Note: Success, failure, issued, on hold, or cancelled status deal with how a status is flagged in setup screens. This does not mean that the status on a case is actually called Success, Failure, Issued, On Hold or Cancelled.



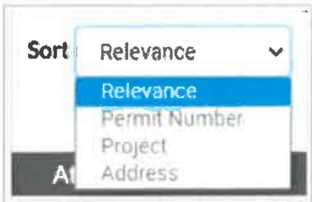
6. **Display**: This dropdown box allows the citizen a way to organize and select one **Status** to view.



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

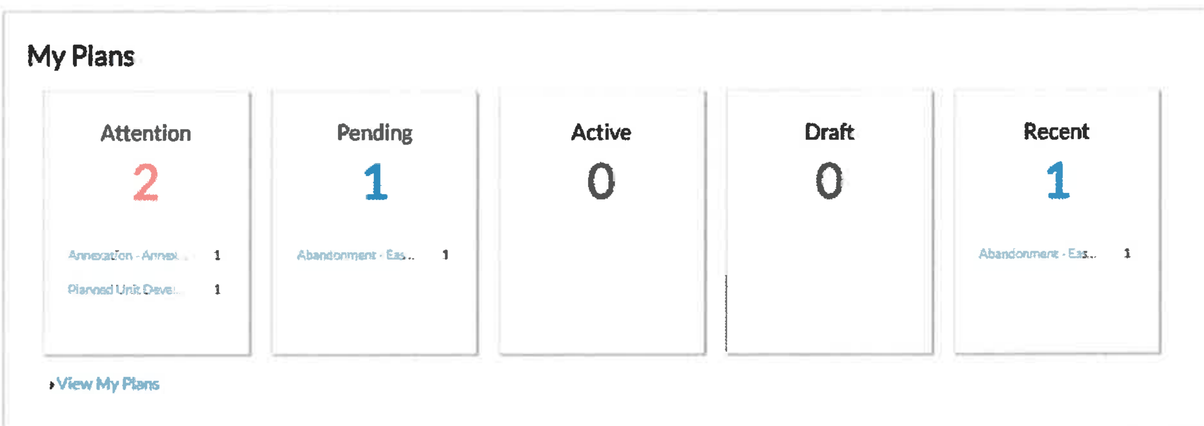


8. **Sort:** This dropdown box allows the citizen a way to sort by **Relevance, Permit Number, Project or Address**.



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 your keyboard or by clicking the *Search* button.

PLANS

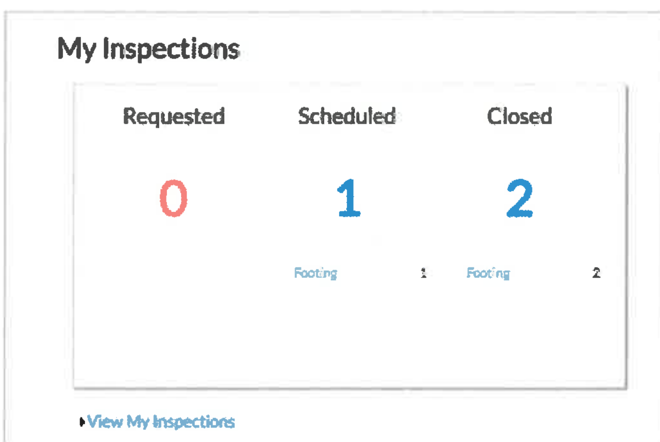


1. **Attention:** By clicking on the *Attention* status from the **Dashboard**, you will be given a list of all Plan numbers that have been applied for that have a status of Attention, Project name, Address attached to the Plan, Type, Status and the Reason that the Plan needs the citizen's attention. 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**, you will 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**, you will 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**, you will 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 screen if they are no longer needed.
5. **Recent:** By clicking on the *Recent* status from the **Dashboard**, you will 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. Criteria for the Recent status is: has been applied for within the last 30 days.

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

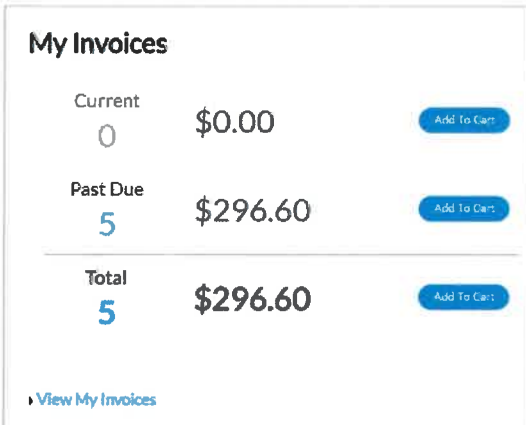
INSPECTIONS



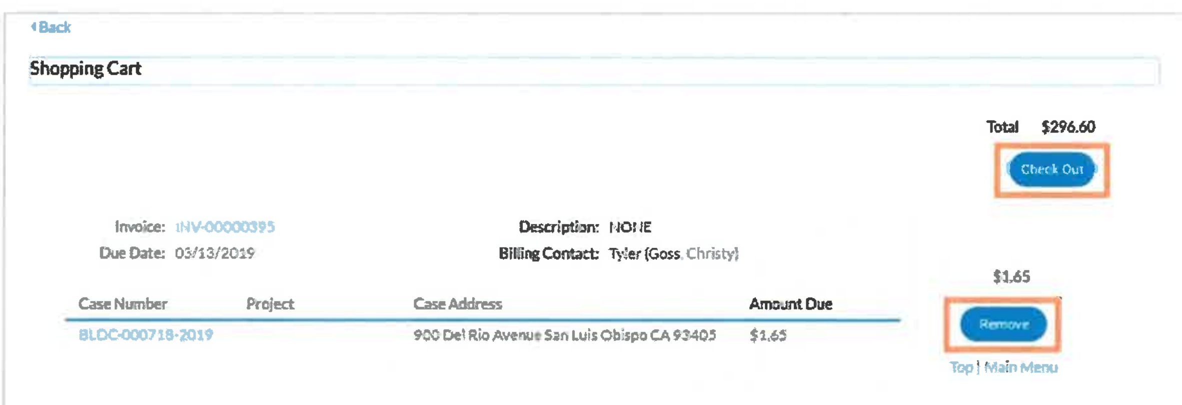
1. **Requested:** By clicking on the *Requested* status from the **Dashboard**, you will be taken to the **My Work** tab to view **My Existing Inspections**. You will be given a list of all Inspection Case Numbers that have a status of Requested, Address attached to the Inspection, Inspection Type and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

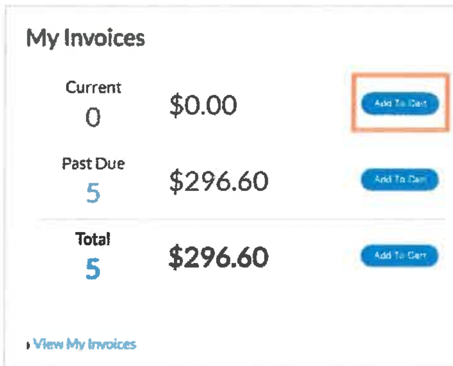


CSS users are able to access invoices that are paid, voided, or unpaid. Invoices are accessible from the **Dashboard** and the menu system and can be added to the electronic shopping cart. CSS's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single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

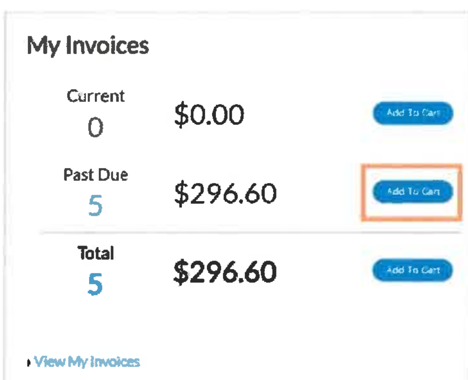


1. **Current:** Click on the *Add To Cart* oval to the right of Current invoices, the citizen will be able to access the Shopping Cart screen where all current invoices are listed. The citizen may access the Invoice by clicking on the Invoice Number or they may access the Case by clicking on the Case Number. To remove an Invoice from the Shopping Cart, the citizen may click *Remove* to the right of the invoice. To checkout, click on the *Check Out* oval to

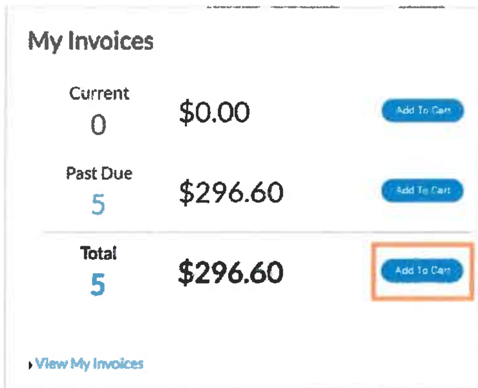
the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).



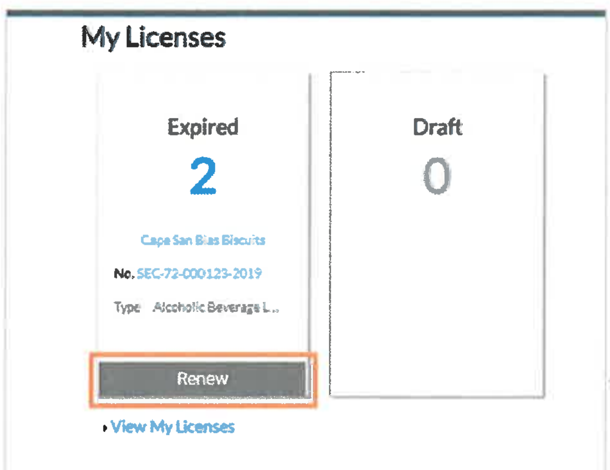
2. **Past Due:** By clicking on the *Add To Cart* oval to the right of Past Due invoices, the citizen will be able to access the Shopping Cart screen where all past due invoices are listed. The citizen may access the Invoice by clicking on the *Invoice Number* or they may access the Case by clicking on 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 on the *Check Out* oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).



3. **Total:** By clicking on the *Add To Cart* oval to the right of Total invoices, the citizen will be able to access the Shopping Cart screen where all invoices are listed. The citizen may access the Invoice by clicking on the *Invoice Number* or they may access the Case by clicking on 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 on the *Check Out* oval to the right of the screen. This will take you to a payment screen to complete the payment for the invoice(s).

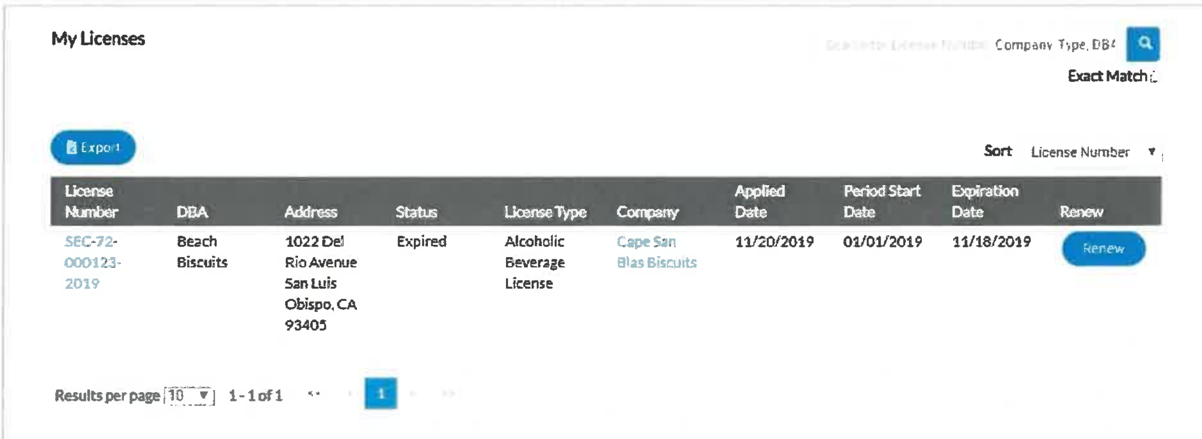


MY LICENSES



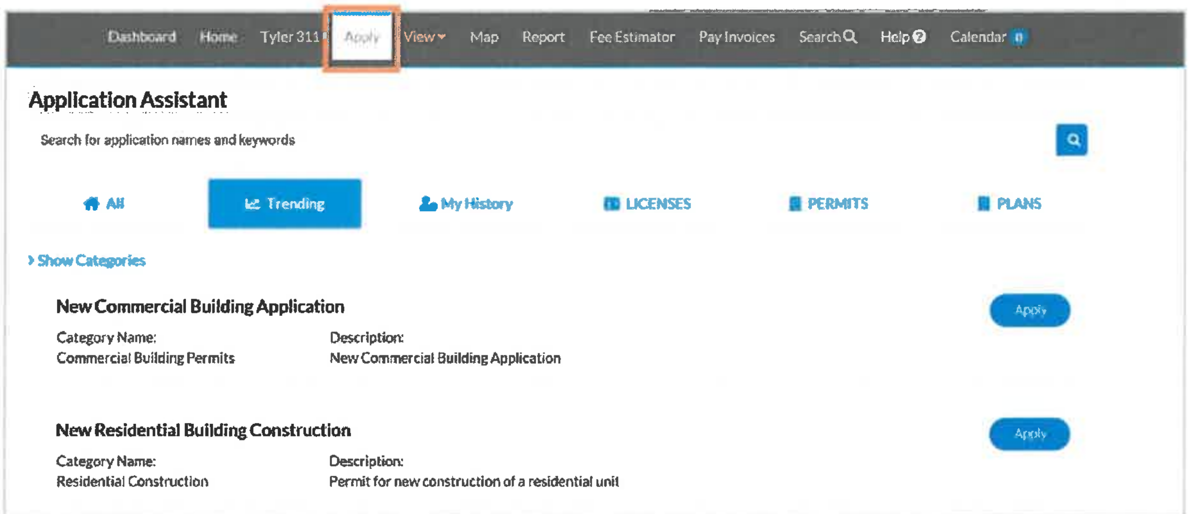
CSS users are able to access Licenses. The Dashboard view of Licenses will show licenses that are close to expiration. These will include licenses that are up for renewal. To view all Licenses, either click *View My Licenses* at the bottom of the **My Licenses** screen. Citizens may also click the *Renew* button on the Dashboard view.

Once on the My Licenses screen, CSS users are able to access all of their Licenses.



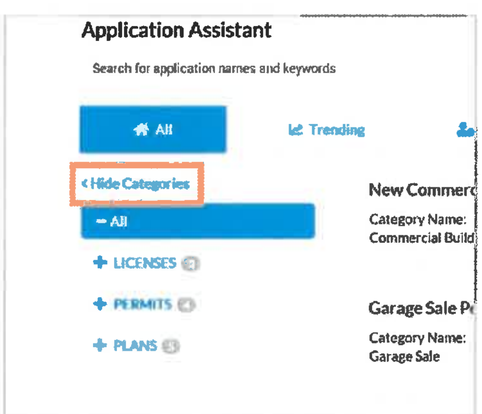
1. **License Number:** Click on the *License Number*, license holders will be taken to a license details screen where they may have access to information regarding location, fees, inspections, attachments, contacts, holds and additional information.
2. **DBA:** Doing Business As – This column will list the name that the Business License may be doing business as. These names may differ from the name on the actual Business in EnerGov.
3. **Address:** The address of where the license is held.
4. **Status:** Status of the license. This may be different for each municipality. Some statuses may include: Expired, Issued, In Review, Submitted.
5. **License Type:** The type of license that was applied for within the municipality.
6. **Company:** Company name. This may be different from the DBA.
7. **Applied Date:** When the license was applied for.
8. **Period Start Date:** When the license was issued and is valid from this date to the expiration date.
9. **Expiration Date:** When the license will expire.
10. **Renew:** Click the *Renew* button to be taken to the License Renewal screen. If the Renew button is not present, the license may not be renewed at that time.

APPLYING USING APPLICATION ASSISTANT

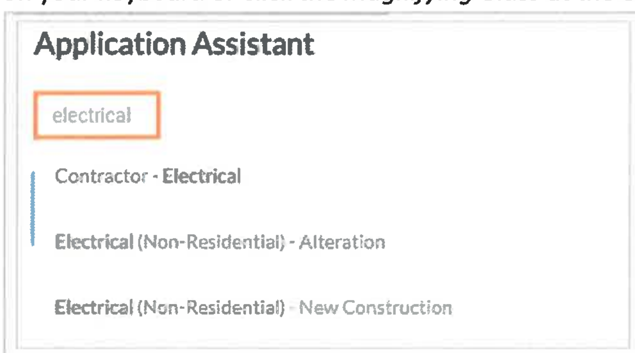


Users are presented with several options on the Application Assistant screen: All, Trending, My History (when logged in), Licenses, Permits and Plans.

1. Click on *All* to choose from all types of Permits, Plans and Licenses available.
2. Click *Show Categories* to help determine which category type to choose from. Click *Hide Categories* to remove category list.

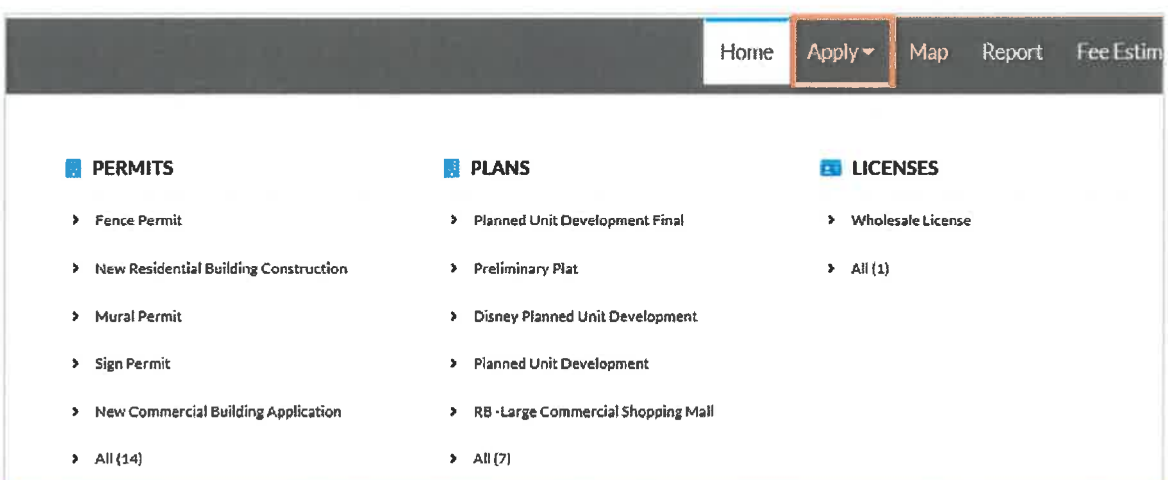


3. Click *Trending* to choose from application types that are currently being applied for the most within the municipality.
4. Click *My History* to choose from application types that have been applied for by the logged in user. This tab will only show when logged in by a registered user.
5. Click *Licenses* to choose from application types for licenses. This can be for Professional Licenses or Business Licenses.
6. Click *Permits* to choose from application types for Permits.
7. Click *Plans* to choose from application types for Plans.
8. Type in key words in the field under the heading of Application Assistant to search for application types. As you type, common results will display. Select the correct result in the list, or Click *Enter* on your keyboard or click the *Magnifying Glass* at the end on the search field to search.



9. Click the *Apply* button to the right of the application type desired.

APPLYING IN CSS WITH APPLICATION ASSISTANT TURNED OFF



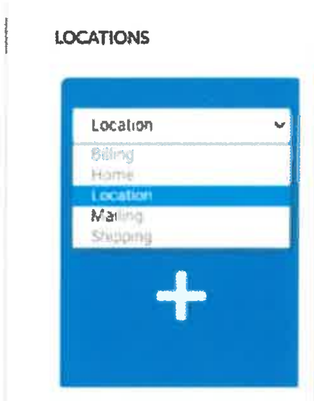
If Application Assistant is turned off, click *Apply* on the ribbon at the top of the screen. Under the Apply tab the top 5 case types are configured on the CSS Administration website, and they are displayed in the order in which the jurisdiction decides to display them. If the user does not see the case type they want to apply for, then the user can click *All* at the bottom of the list to access the Application Assistant; this tool helps guide the user into choosing the correct permit type to apply for all. It is a CSS Best Practice to use the Application Assistant rather than the Apply dropdown. See previous instructions on Application Assistant.

CSS users can begin applying for cases and resume the application process later. The application will be saved under Draft. This is helpful when users want to save completed work and then continue when they're ready.

1. Click *Apply* and choose from the application types listed or choose from the Application Assistant screen.
2. The **Apply for** screen will open and the steps to the application process will be listed along the top of the screen.

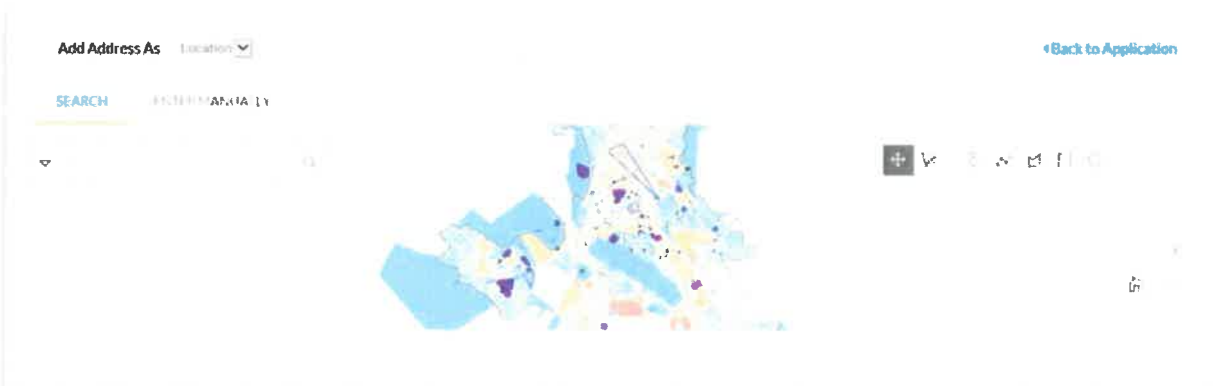
STEP 1: LOCATION

1. **Locations:** Click on the *Location* card to add the location for the application. Select from the dropdown box what type of address is being added.



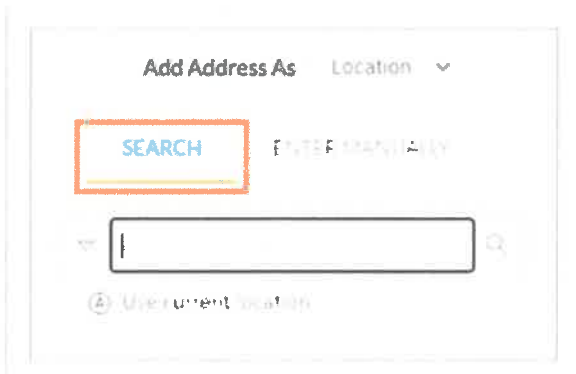
1. Click the *Plus Sign* in the center of the **Add Address** card.
2. You will be directed to the Map screen. Here you may: search for an address, manually enter an address or draw a spatial collection to be used as an address.

To Search for an Address:

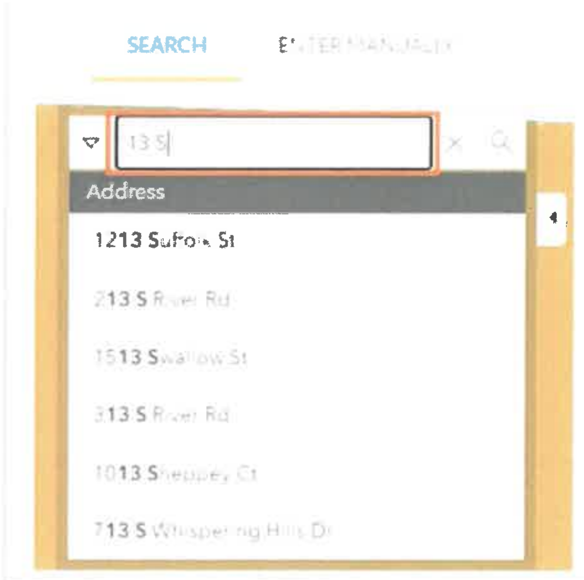


3. Choose from the drop down to **Add Address As: Location, Billing, Shipping, Home or Mailing.**
4. The user may click the *drop down* arrow on the left to choose to search by: **All, Address or Parcels.**

5. Click *Search* under **Add Address As** and enter in an address in the **Address & Parcel Search** field. The user may also select: Use current location. This appears once you click in the field. This field will also allow partial information of the address.



6. Type the address or parcel in the search field. The system will list common results specific to the information you type below the search field.

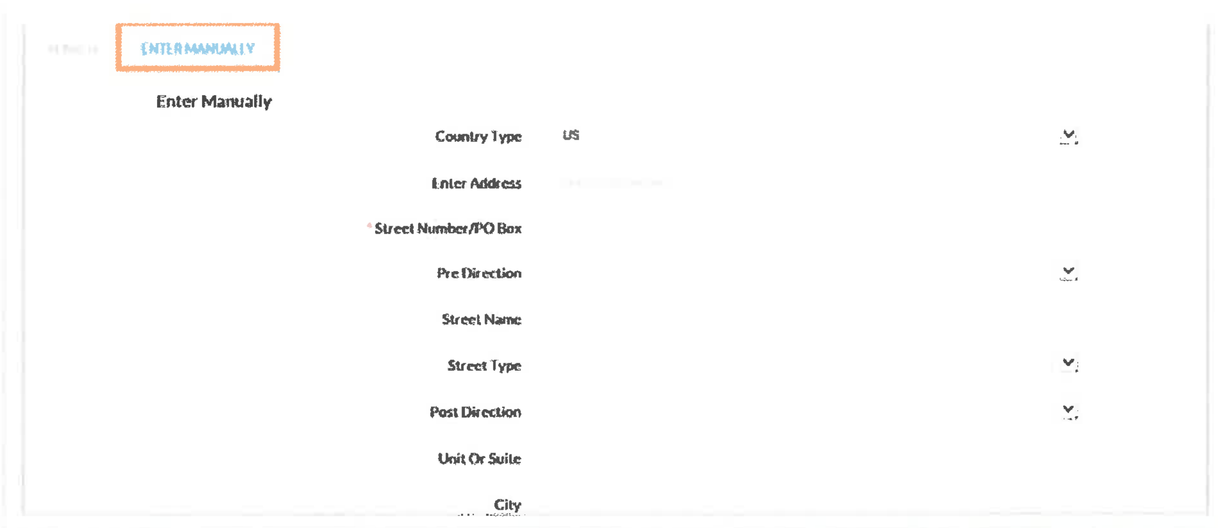


7. Once an Address or Parcel has been entered, click *Enter* on your keyboard or click the *Magnifying Glass* to conduct the search.
8. The information will render on the left of the screen and drop a pin on the map with a popup showing Parcel, Owner and allowing the user to Zoom To or Add.
9. Once an Address or Parcel has been found, click the *box* next to the Address on the left of the screen and click *Apply* or click *Add* in the popup on the map.

10. Once the address has been added to the Locations screen, click *Next*.

To Enter Manually an Address:

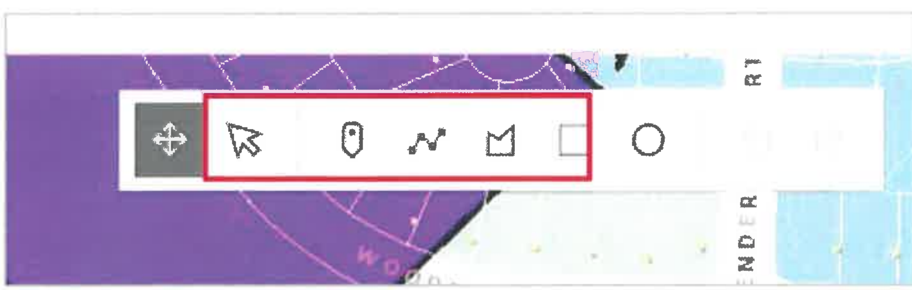
11. Select The Enter Manually tab.



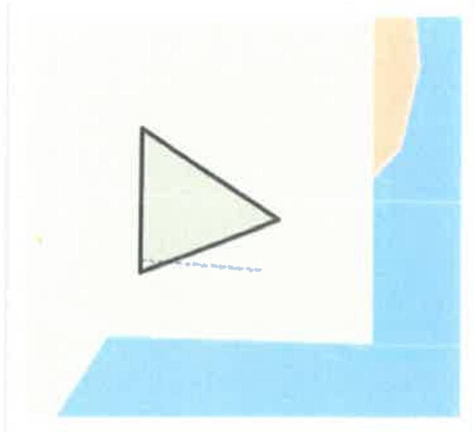
12. Enter in all information required for the screen and for the application of the case.
13. Cick *Save*.
14. Once the address has been added to the Locations screen, click *Next*.

To Add a Spatial Collection:

15. Navigate to the area of the map that the spatial collection will need to be drawn.
16. The tools to draw the spatial collection are to the right of the screen.



17. The user may draw a point, line, polygon, rectangle or a circle on the map.
18. Select the desired feature button and draw the shape on the map. Each single click will allow a turn of a line in the shape and a double click will allow the user to finish drawing the desired feature.



19. To transform the feature, click the *Transform* button.

20. A box will appear around the feature and will allow the user to transform the original by moving the smaller white squares into the desired positions.

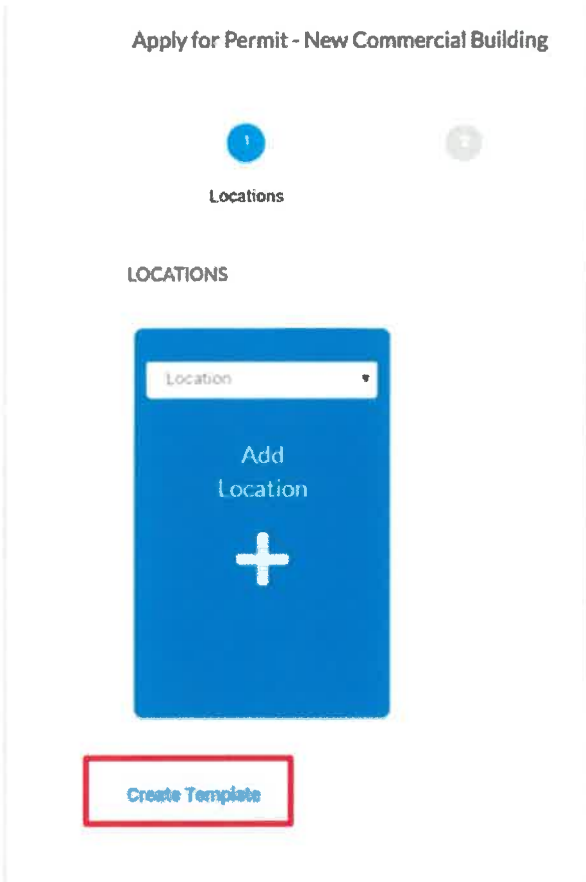
21. To Reshape the feature, click the *Reshape* button.
22. Small circles will appear on the feature and will allow the user to reshape the original by moving the circles into the desired positions.

23. Once done drawing and editing the fature, click on the desired spatial collection and click *Add this shape*.

24. Once the fature has been added to the Locations screen, click *Next*.

APPLICATION TEMPLATES

Application Templates are drafts that the citizen may reuse when applying for the same Case Type and Workclass.



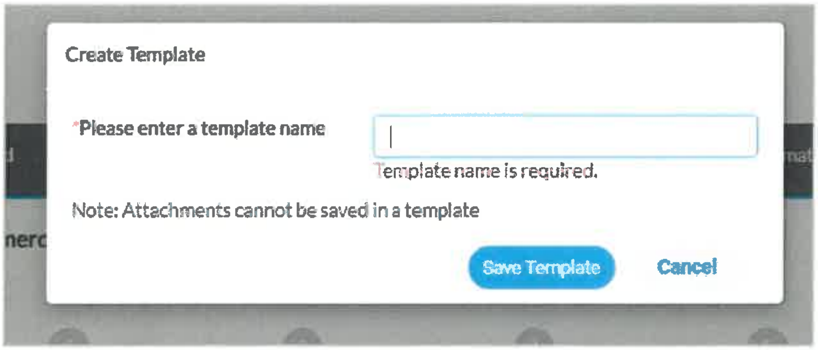
1. Fill in any details on the case that are needed to be repeated for upcoming uses.

Note: The Add Location card may be disabled when creating a Template.

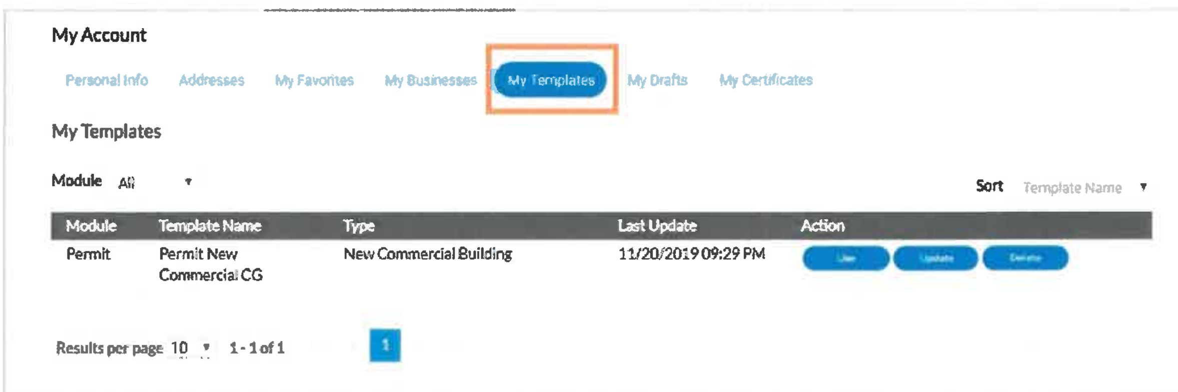
2. Click *Create Template* at the bottom of any stepper in the process.

Note: By default the Template will not allow saving of Attachments.

3. Enter in the name of the template and click *Save Template*.



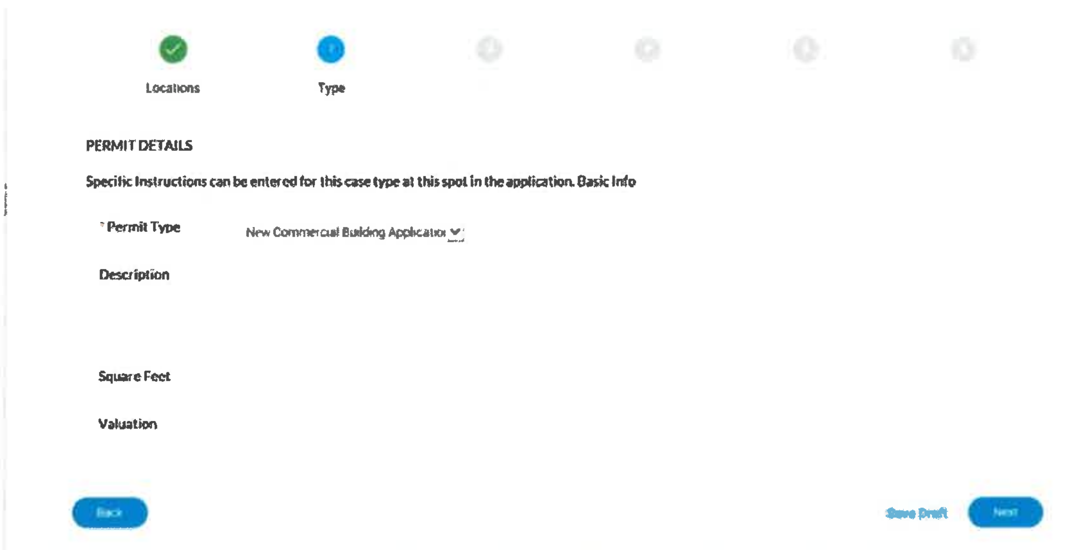
4. Once the Template has been saved, a popup will appear to navigate to the template or the template may be found under **My Account**. To access the templates click on the *My Templates* button.



5. The citizen has the ability to **Use, Update or Delete** the template by clicking the applicable button.

STEP 2: TYPE

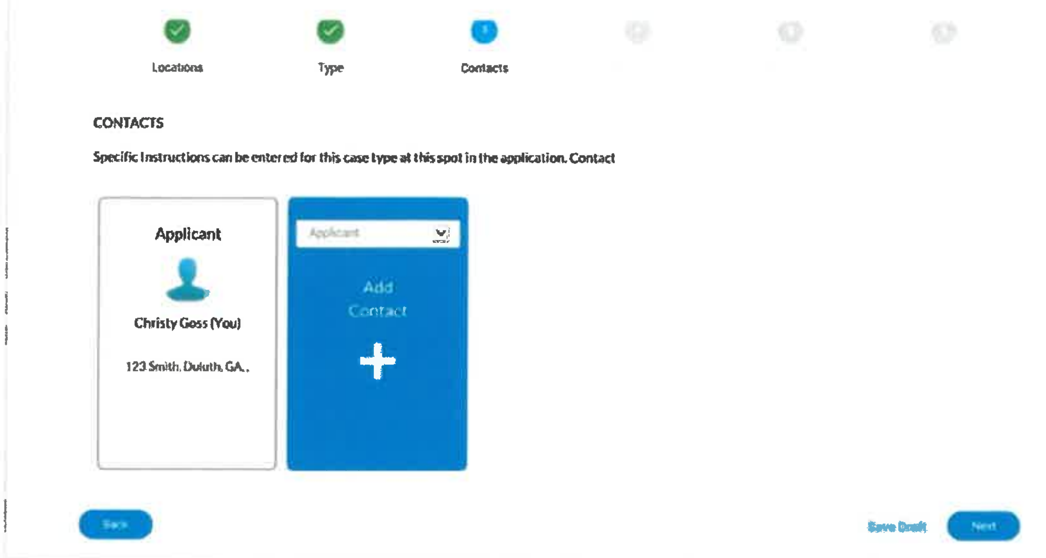
The application type that was initially selected will default in the Type field.



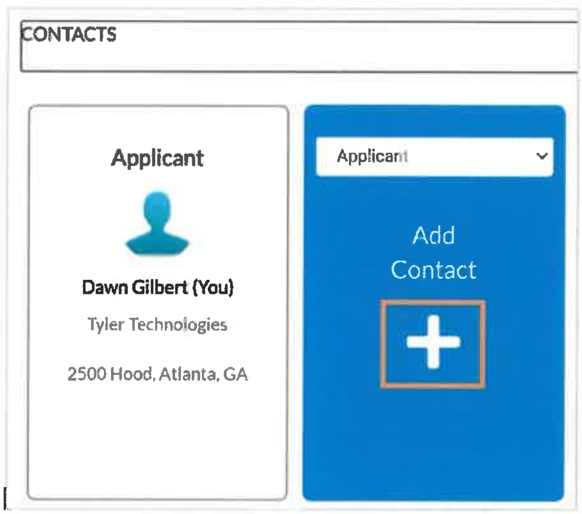
1. A description to support the details of the application type can be added in the **Description** memo box.
2. Enter **Square Feet and/or Valuation** if applicable. If this information is required, the fields will be present and denoted by a red asterisk.
3. Click *Next*.

STEP 3: CONTACTS

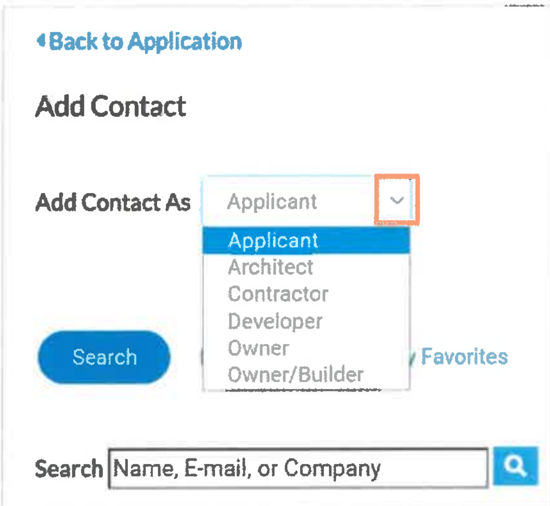
The registrants contact information will default to the first Contact card listed. Additional contats can be added if applicable.



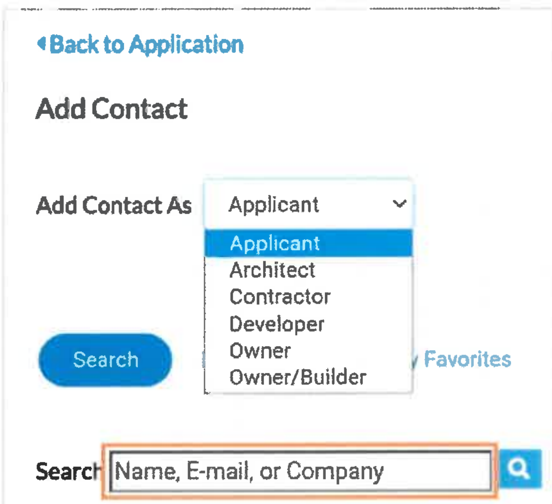
1. To add additional contacts, click the *Plus Sign* located on the Contact Card.



2. Click the dropdown arrow to select the Contact Type applicable to the contact.

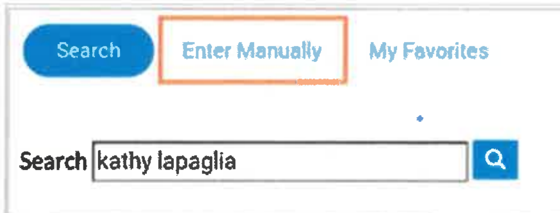


3. In the search box, type in Name, Email, or Company name and click the *Magnifying Glass* to search Global Contacts in EnerGov for an existing contact.



4. If the person, email or company is an existing contact click *Add* to add the contact to the application.

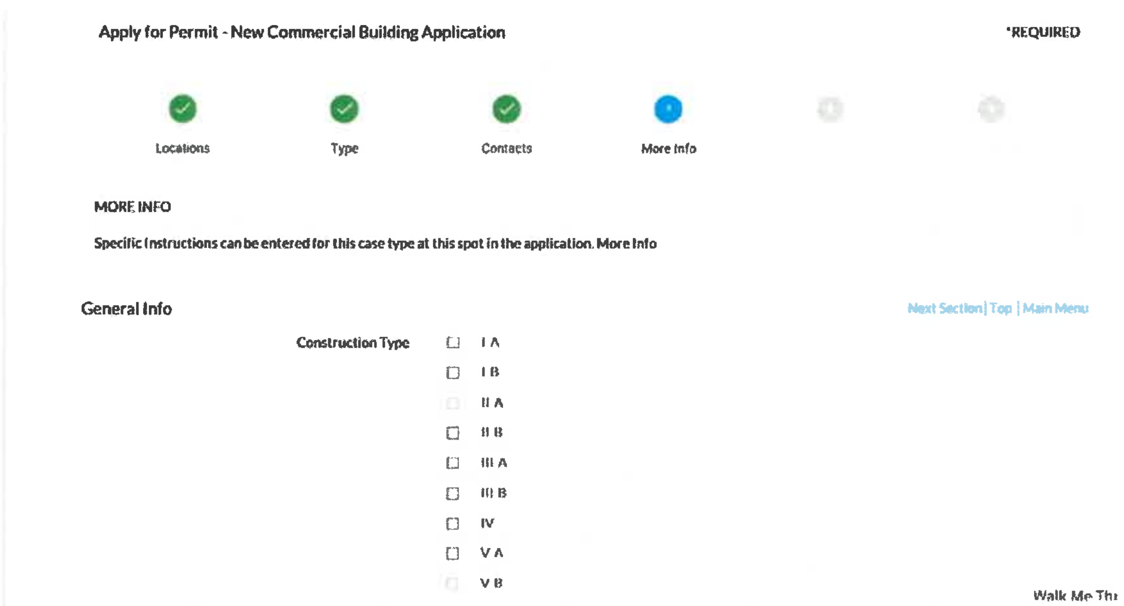
5. If the contact does not exist in Global Contacts, click *Enter Manually* and fill in the required fields.



6. Click *Next*.

STEP 4: MORE INFO

The More Info fields reflects the Additional Information fields that are exposed to the citizen from EnerGov. The citizen may fill in the information needed and some fields may be required. Any information given in these fields will be shown in EnerGov. Once this information is submitted by the citizen, the citizen will not be able to edit the information. The end user may edit the information in EnerGov.



1. Enter information as needed or required.
2. Click *Next*.

STEP 5: ATTACHMENTS

Attachments gives the citizen the ability to upload files or documents needed or required for the application process.

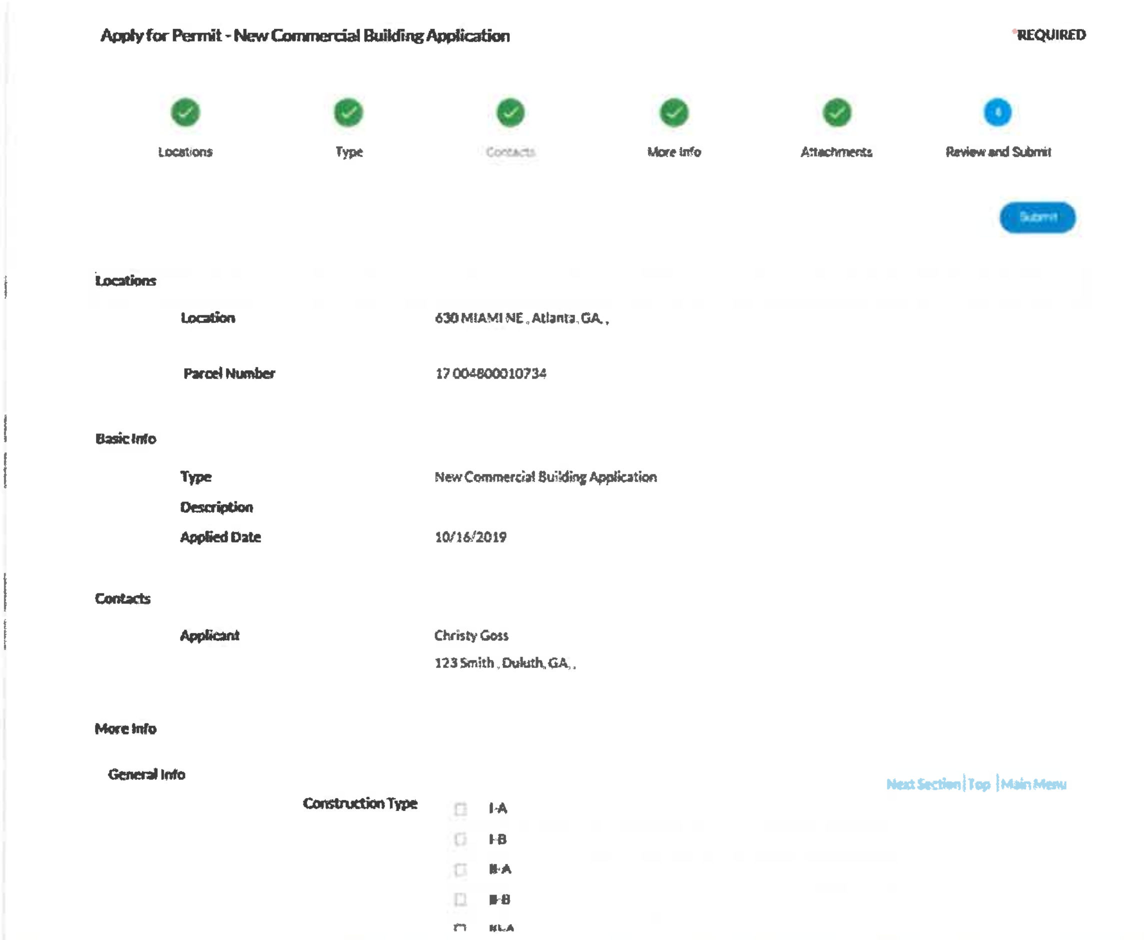
1. Click on the *Add Attachment* card to open Windows Explorer.
2. Click to insert or drag files into the Add Attachment card.

> Note: Certain application types may have required documents that must be attached in order to save.

3. Click *Next.*

STEP 6: REVIEW AND SUBMIT

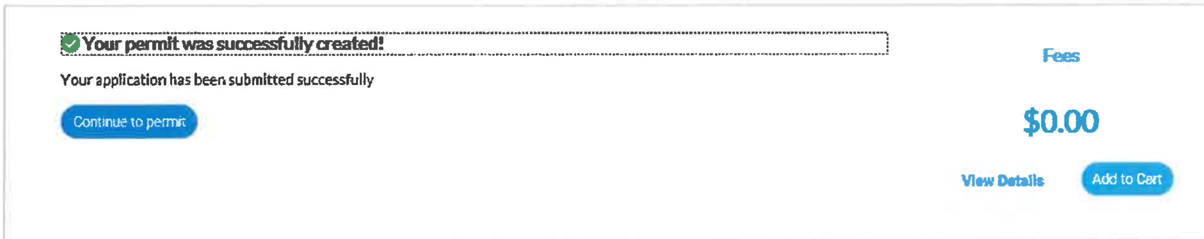
Review and Submit gives the citizen the ability to review all information entered in the application to include attachments uploaded, estimated fees and additional information fields that were populated.



1. Click *Save Draft* if the information is incomplete and needs to be finished at a later date. The citizen may click on the Draft status circle on the Dashboard to resume their application.
2. If the application is complete and accurate click Submit at the bottom of the screen.

SUCCESS SCREEN

Once an application has been submitted, a Success screen will appear. The citizen may click the *Continue To* button or add any fees that have been invoiced to their shopping cart to proceed to payment.

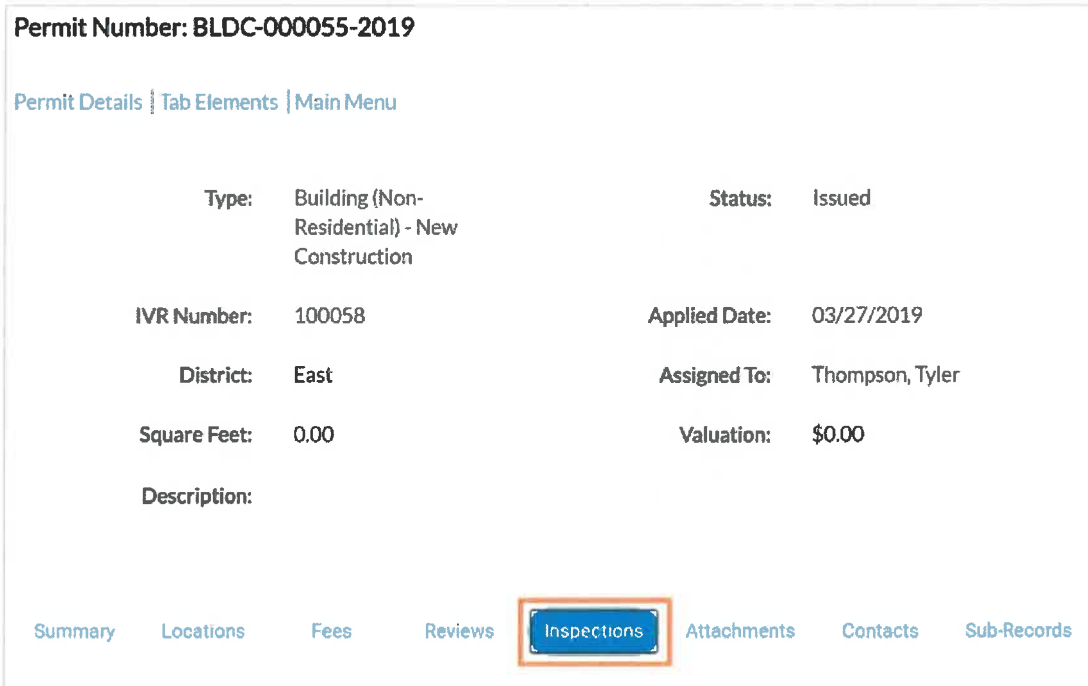


REQUESTING INSPECTIONS AFTER A PERMIT IS ISSUED

1. Click on the *Permit Number* of the Permit you would like to request an inspection for.

Permit Number	Project	Address	Permit Type	Status
BLDC-000055-2019		1204 TREFOIL CT NAPERVILLE, IL 60563	Building (Non-Residential) - New Construction	Active
BLDC-000076-2019	Benton Heights	13 S Main St Naperville, IL 60540	Building (Non-Residential) - New Construction	Active

2. The Permit case will open.
3. Click on the *Inspections* tab.

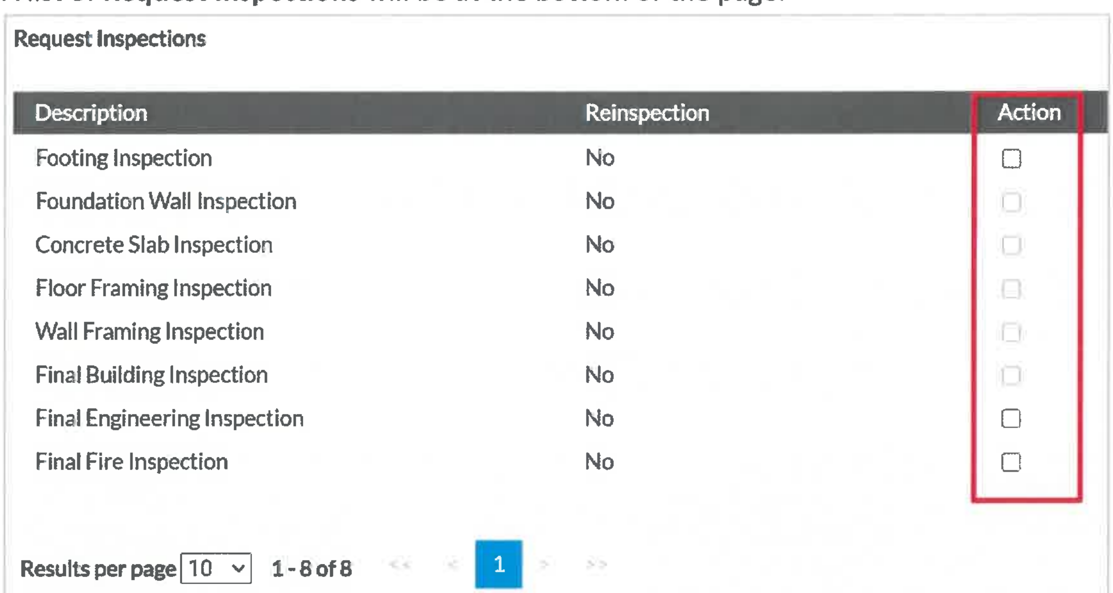

Permit Number: BLDC-000055-2019

Permit Details | Tab Elements | Main Menu

Type:	Building (Non-Residential) - New Construction	Status:	Issued
IVR Number:	100058	Applied Date:	03/27/2019
District:	East	Assigned To:	Thompson, Tyler
Square Feet:	0.00	Valuation:	$0.00
Description:			

Summary Locations Fees Reviews Inspections Attachments Contacts Sub-Records

4. A list of **Request Inspections** will be at the bottom of the page.


Request Inspections

Description	Reinspection	Action
Footing Inspection	No	☐
Foundation Wall Inspection	No	☐
Concrete Slab Inspection	No	☐
Floor Framing Inspection	No	☐
Wall Framing Inspection	No	☐
Final Building Inspection	No	☐
Final Engineering Inspection	No	☐
Final Fire Inspection	No	☐

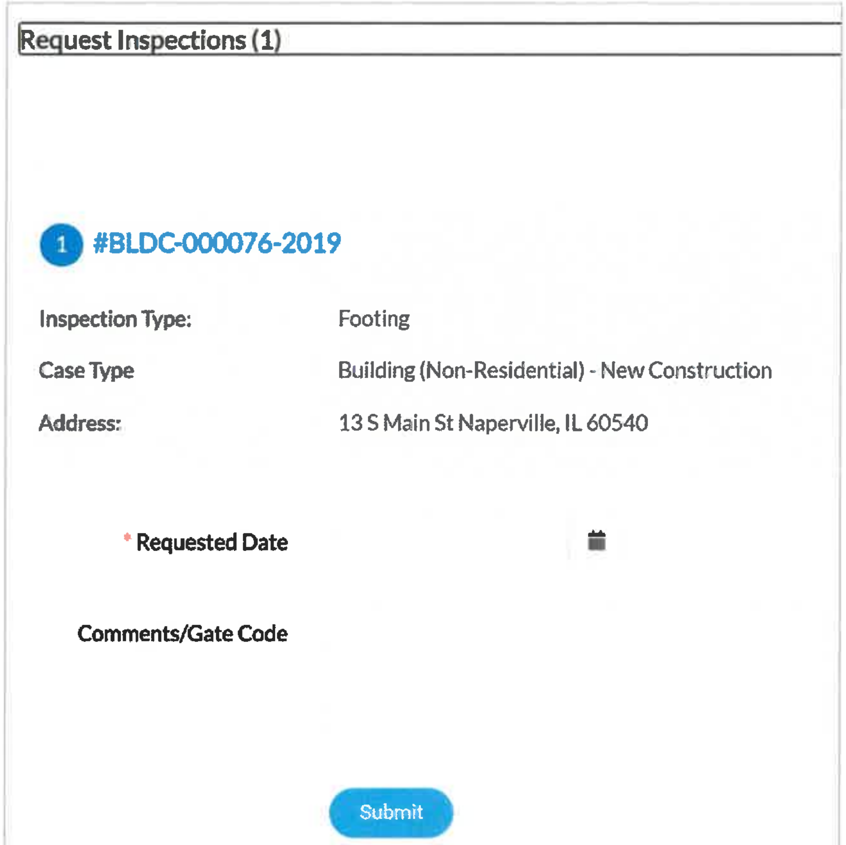
Results per page 10 1 - 8 of 8 1

5. Click in the *checkbox* under **Action** for the inspection you would like to request.

Note: If the workflow of the case has not been completed up to the inspection step (based on a priority set), the Action boxes will not be visible.

6. Click *Request Inspection* at the bottom right of the page.

7. The **Request Inspections** screen will open.

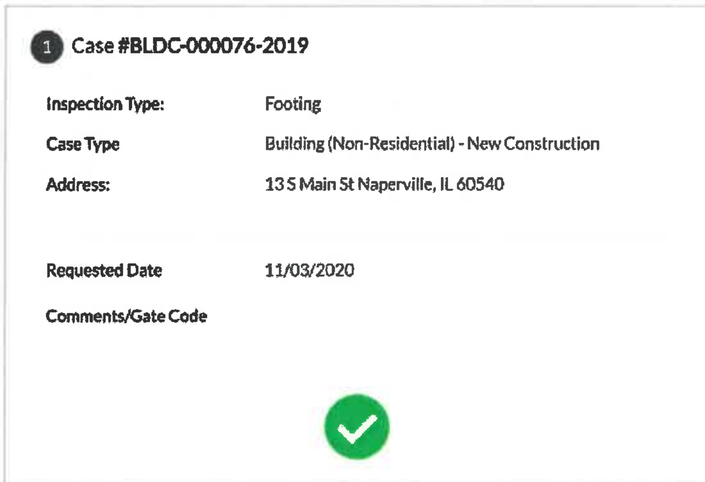


8. Click on the *Calendar* to choose a requested date for the inspection.

9. Fill in comments about the requested inspection in the **Comments/Gate Code** box.

10. Click *Submit*.

11. The inspection information and a green checkmark will pop up in a **Requested Inspections** screen if it is successfully requested.

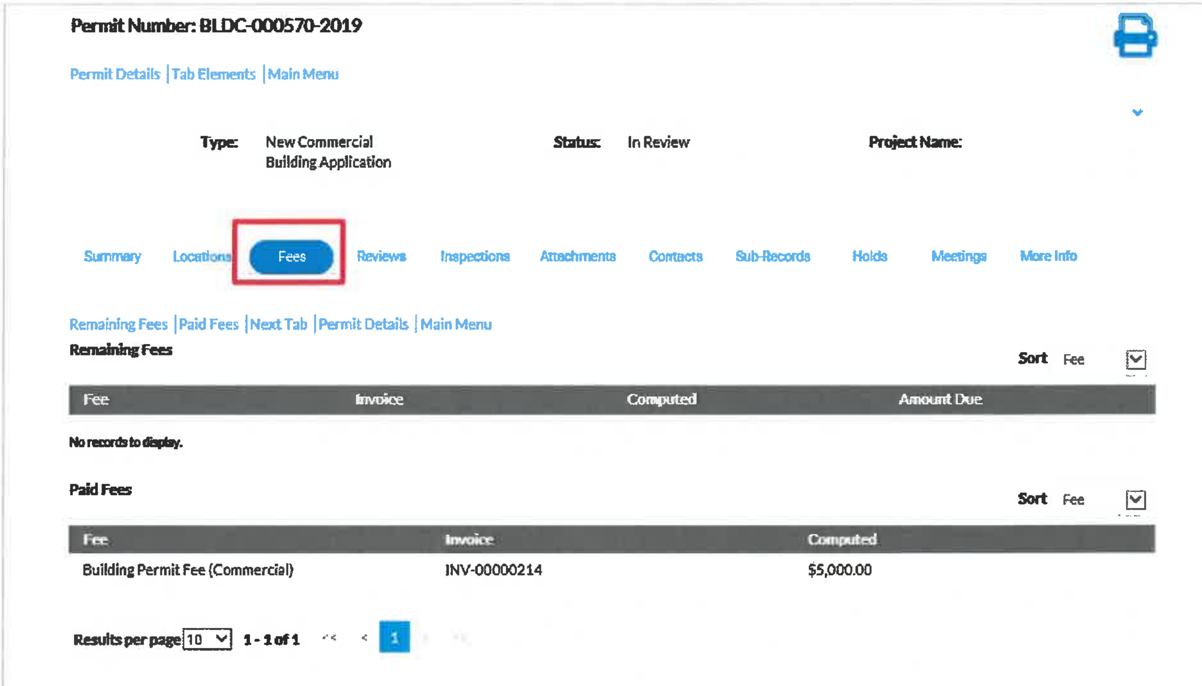


12. Navigate back to the Details screen. The inspection will now be listed under **Existing Inspections**.

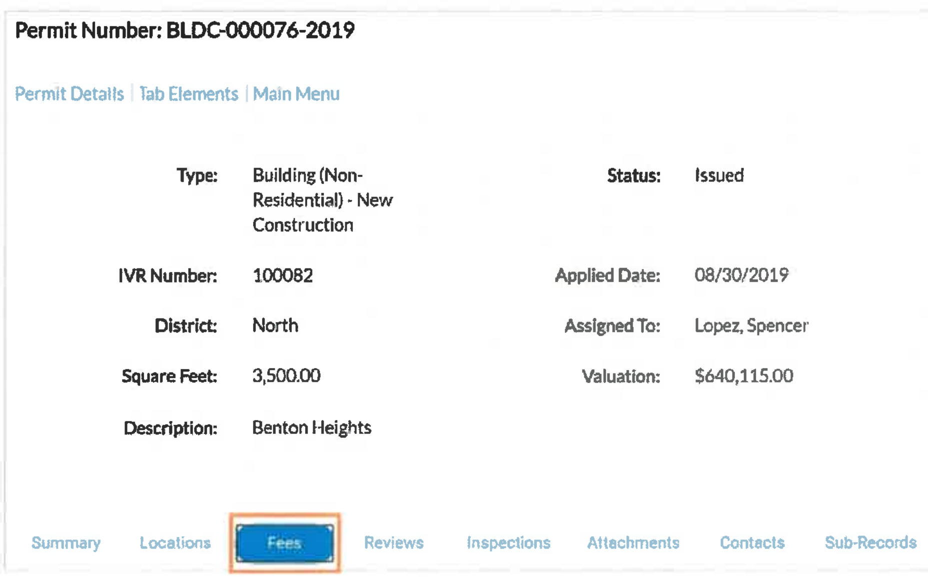
13. The citizen may cancel the inspection by clicking the *Cancel Inspection* button to the right. Once the inspection has been scheduled the **Cancel Inspection** button will disappear.

PAYING FEES

In order for the citizen to view or pay fees, the fees must first be invoiced in EnerGov.

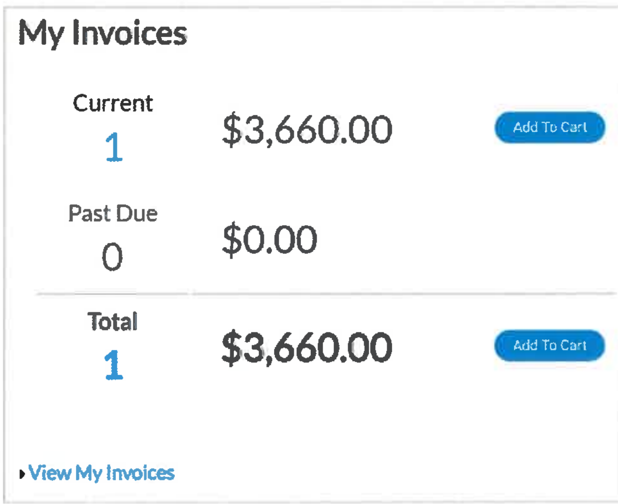


1. Navigate into the Plan/Permit of your choice.
2. Click on the *Fees* tab.



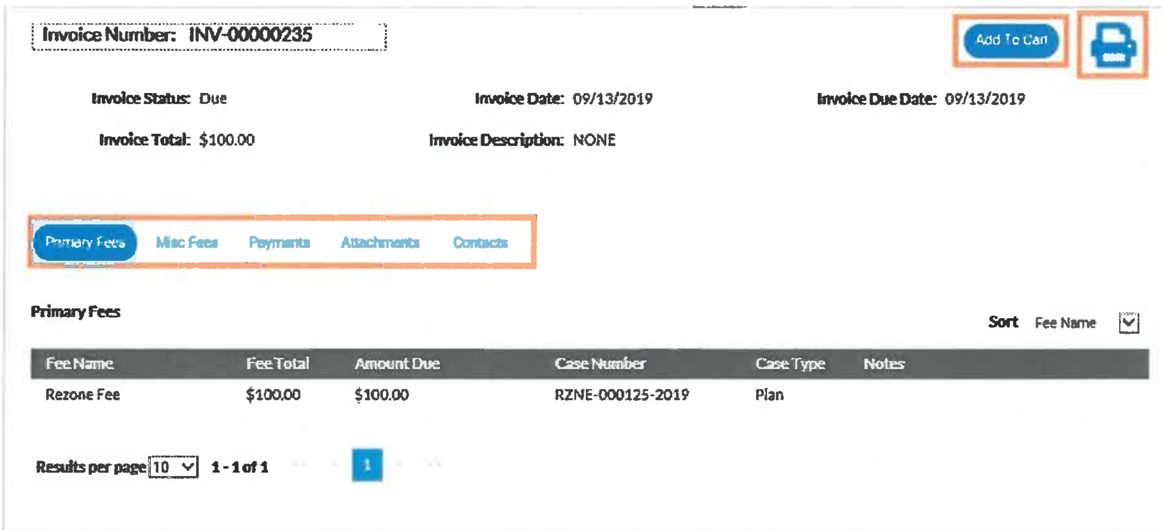
3. A list of **Remaining Fees** and **Paid Fees,** to include the invoice numbers, will be listed next to the fee name.

4. Click on the *Dashboard* tab in the black banner at the top of the screen.
5. Navigate to **Invoices** at the bottom of the page.



INVOICES

CSS users are able to 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**.



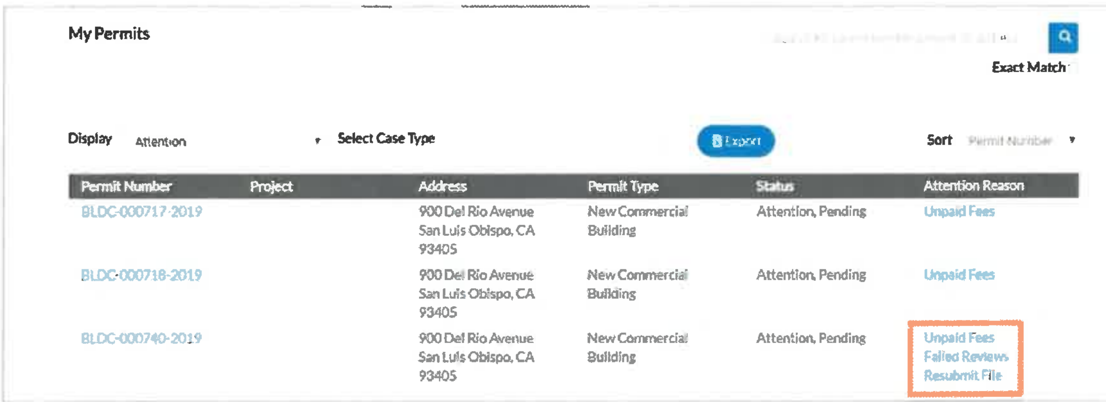
Follow the steps below to view invoice information:

1. Click the *Printer* button to print or save the invoice as a PDF.
2. Click *Primary Fees* to view the **Fee Name**, **Fee Total**, **Amount Due**, **Case Number**, **Case Type**, and **Notes** for all fees associated with the invoice.
3. Click *Misc Fees* to view the **Fee Name**, **Fee Total**, **Paid Amount**, and **Amount Due** for all miscellaneous fees associated with the invoice.
4. Click *Payments* to view the **Receipt Number**, **Status**, **Transaction Type**, **Payment Type**, **Payment Amount**, and **Payment Date** for all payments associated with the invoice.
5. Click *Attachments* to view the **File Name** and **Added Date** for all files attached to the invoice.
6. Click *Contacts* to view the **Company**, **First Name**, **Last Name**, **Title**, and **Email** for all contacts associated with the invoice.
7. Click *Add to Cart* to add the invoice to the **Shopping Cart**.

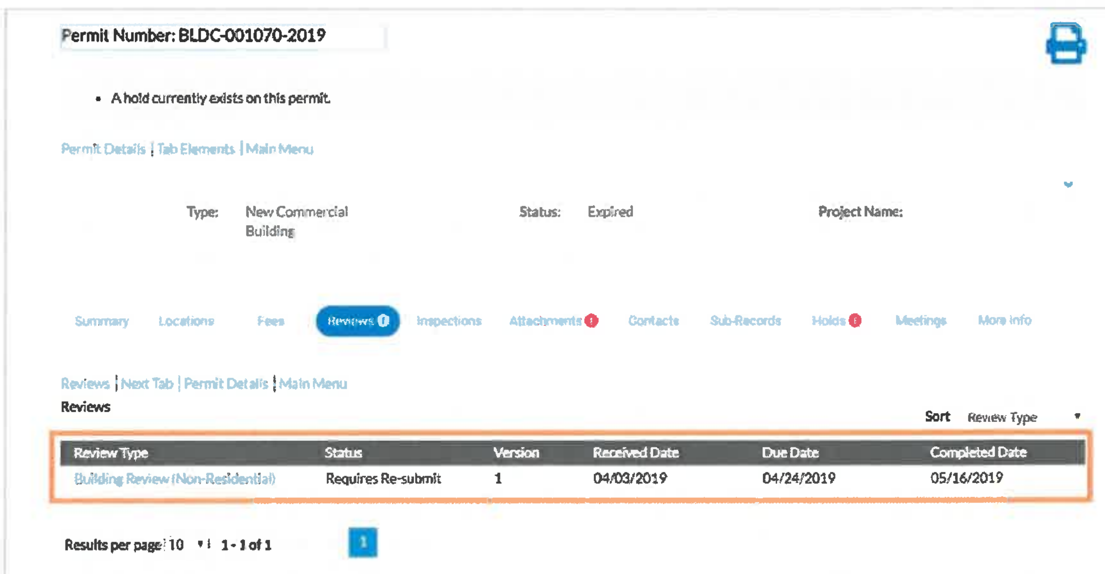
MANAGING A REVIEW

Citizens may submit electronic plans via CSS to be reviewed by the municipality. Once an application has been submitted and plans reviewed, the citizen may be notified by email or logging back into CSS to review Failed or Approved Reviews.

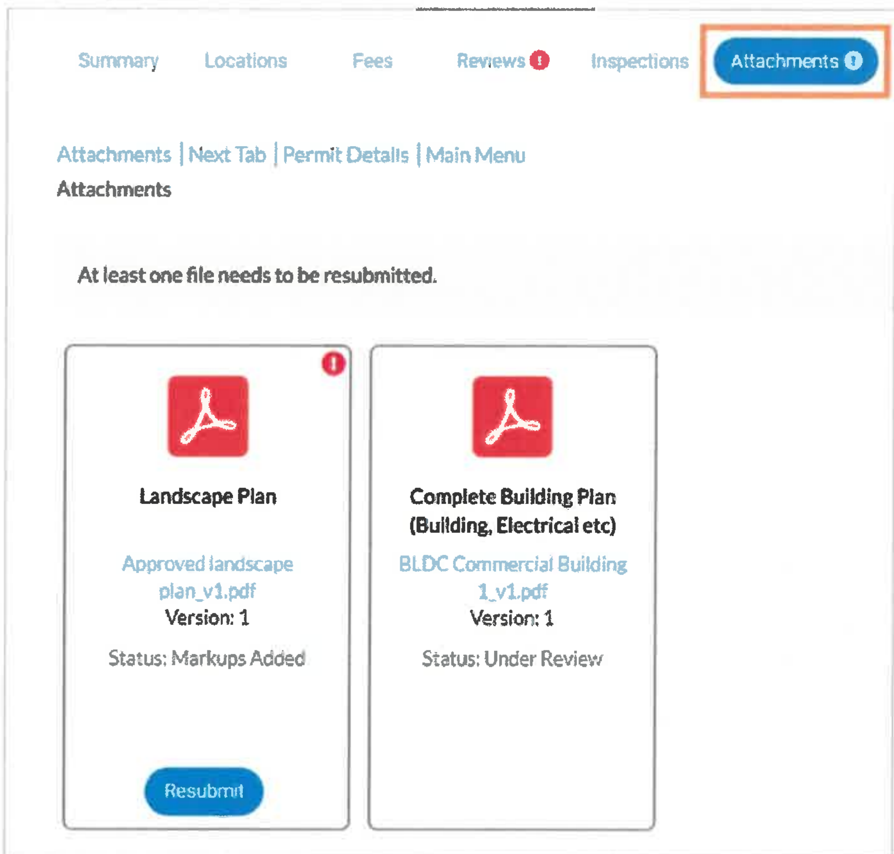
1. Navigate to the Dashboard and click on the Attention card.
2. A list of the cases needing attention in the specific module will be listed.
3. Click the **Failed Reviews** link under the **Attention Reason** column.



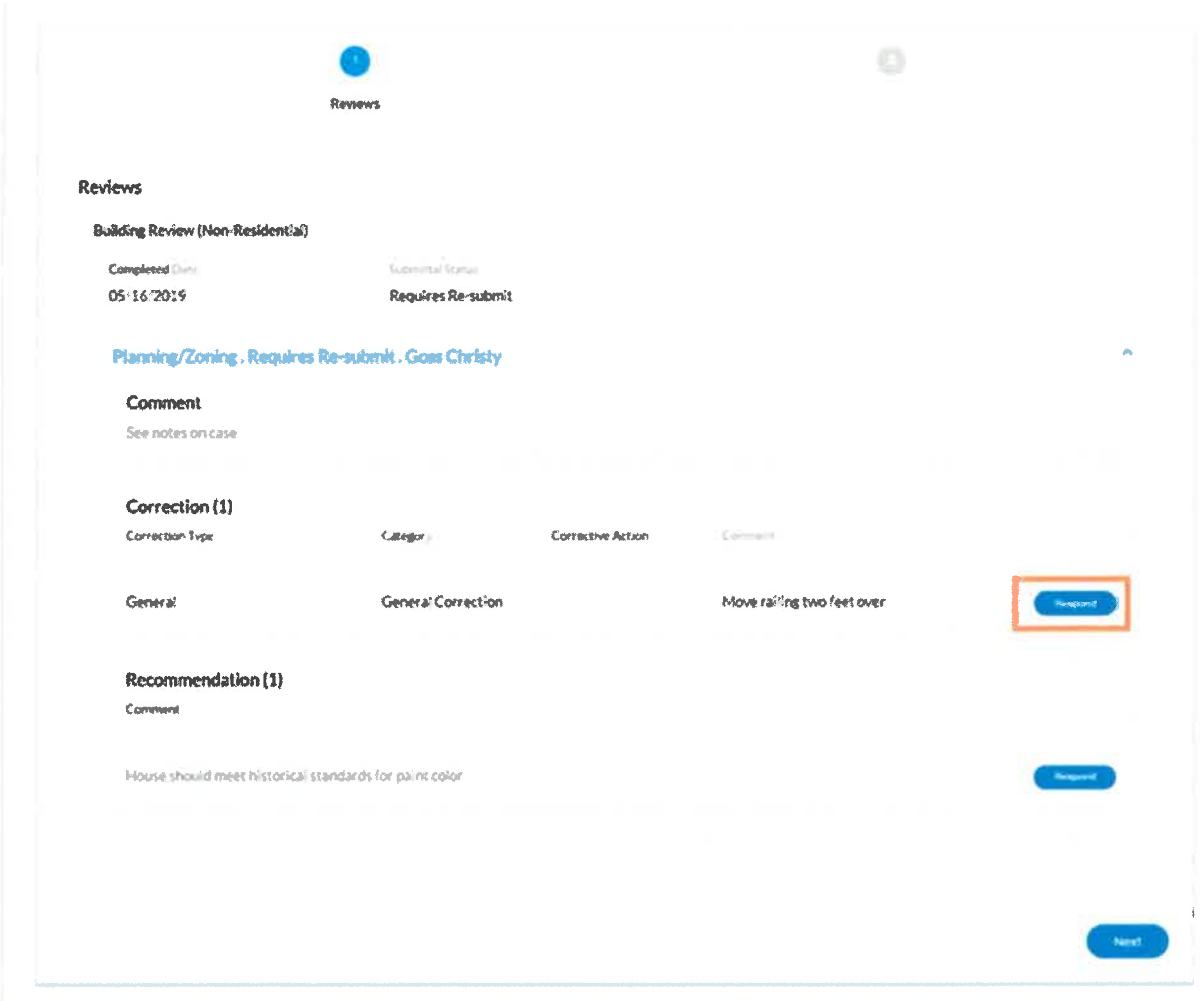
4. The **Review Type** will be listed and will include: **Status, Version, Received Date, Due Date and Completed Date.**



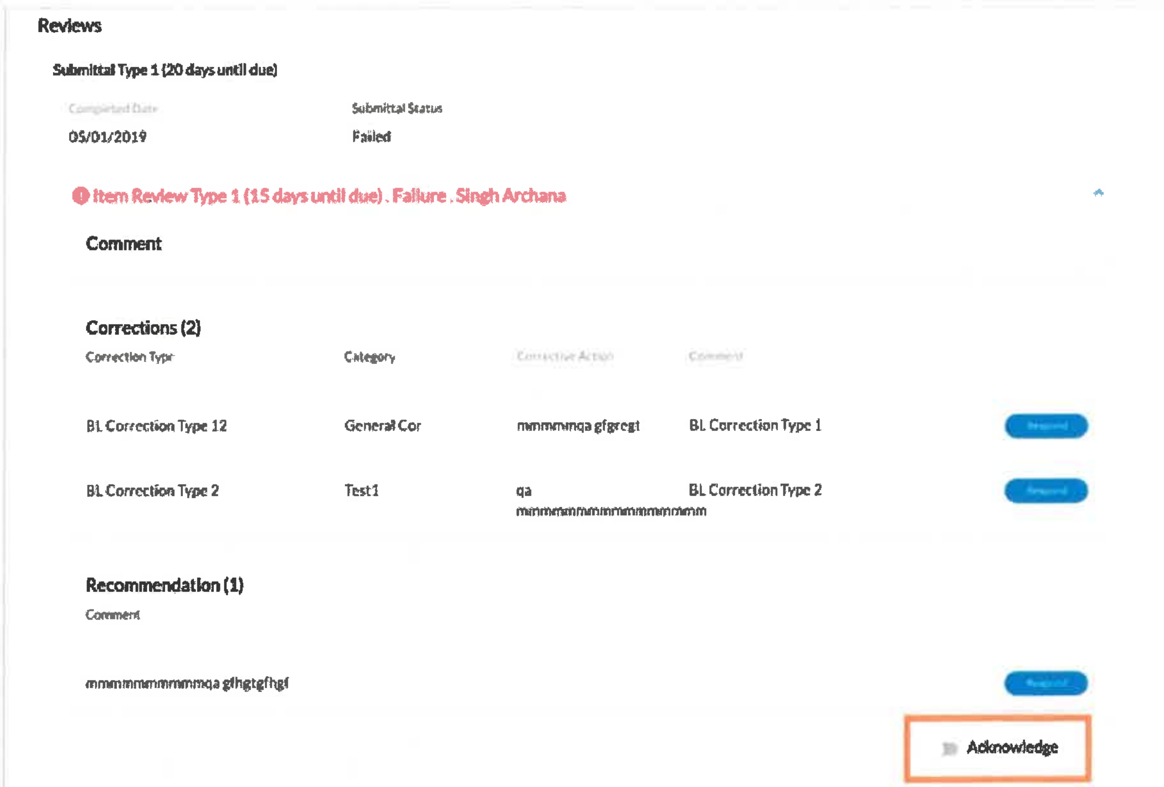
5. The citizen will also see an alert on the **Attachments** tab. This will indicate which electronic file was failed and requires resubmission. Click on the *Attachments* tab.



6. Click the *Resubmit* button on the specific file(s) that need to be resubmitted.
7. The citizen may drill down on each item review from the submittal to view Corrections, Recommendations and Comments.

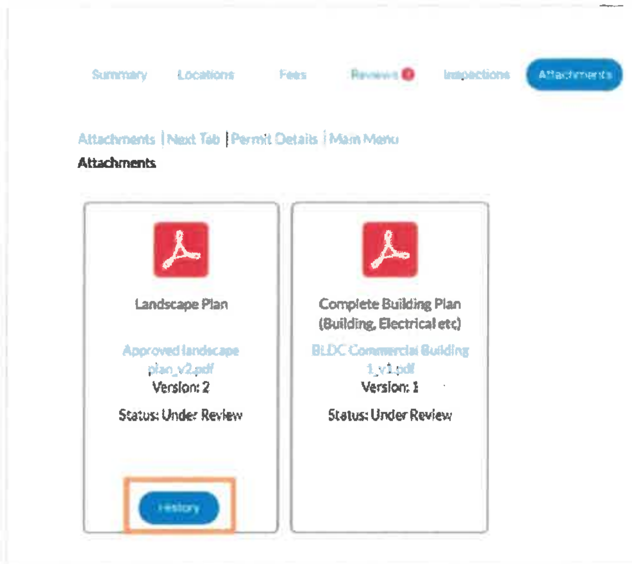


8. Citizens may click the *Respond* button, on the right of each Correction or Recommendation, to give a response back to the Reviewer.
9. Once a Response is given, the citizen may click *Hide Response*.
10. The citizen must **Acknowledge** any **Comments, Corrections or Recommendations** that were given by the Reviewer by toggling the **Acknowledge** button to the right.



11. To navigate to the next step of the Review, click *Next*.
12. To Resubmit a file click Select *File*, choose the second version of the file to be resubmitted.

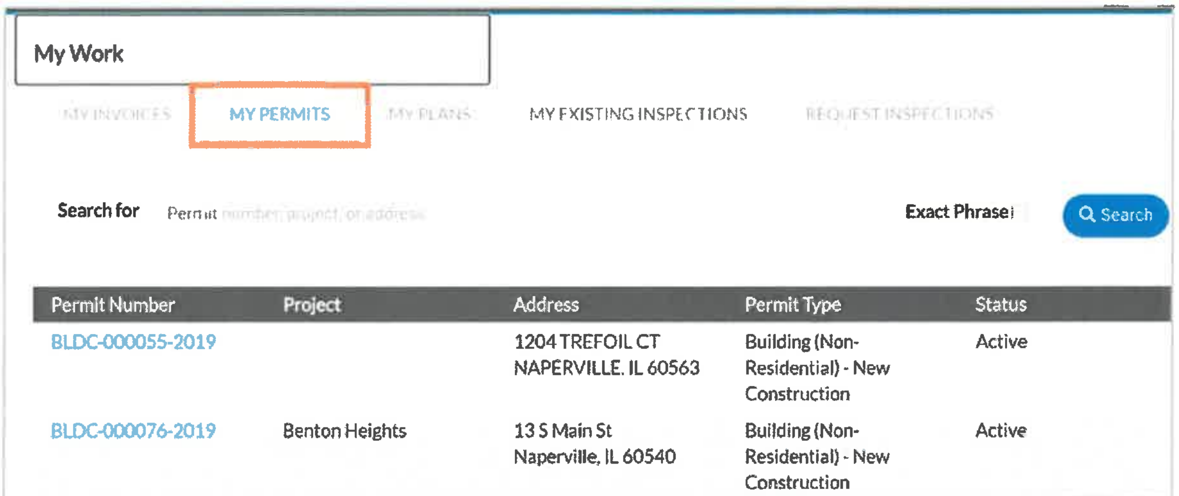
13. Click *Submit.*
14. On the Attachments tab, the citizen may view the History of the submitted attachments by clicking the *History* button.



MY WORK

Click the *My Work* tab at the top of the **Dashboard** screen to access the following: Invoices, Permits, Plans, and Inspections.

MY PERMITS



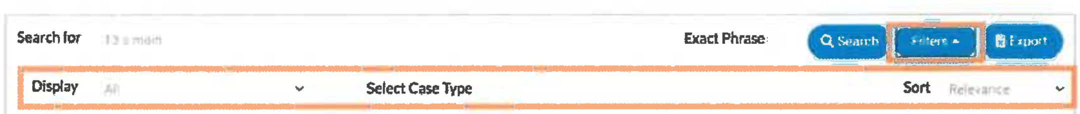
CSS allows users to view the details of a permit.

Follow the steps below to view permits:

Not all permit data is available to all users.

1. In the search field type a specific project, address, or permit number to search. Click the *Search* button.

2. Click the *Filter* button to expand the the search criteria.



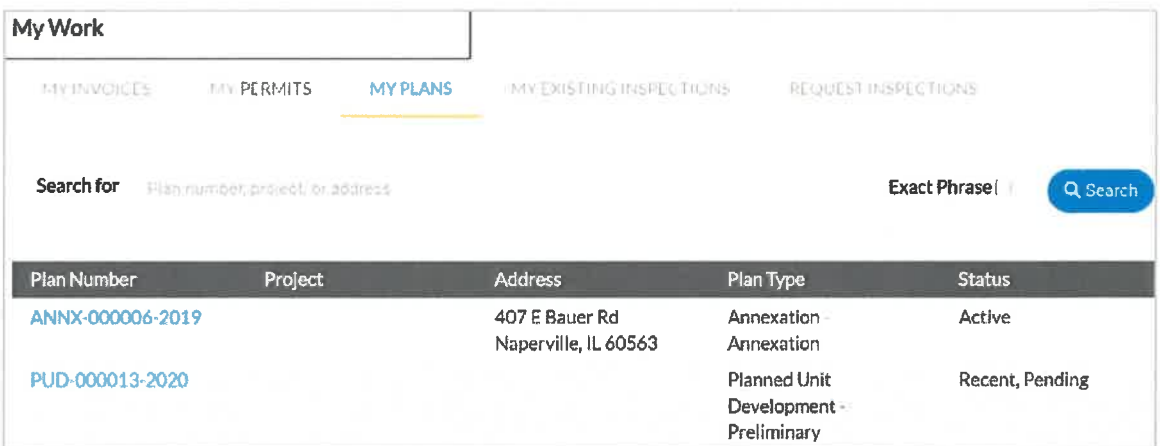
3. Click the *Display* dropdown to select and search by status.
4. Click within the *Case Type* field to search by a specific case type. The results will display in a dropdown for the citizen to choose from.
5. Click the *Sort* dropdown to sort the cases within the search.
6. Click a *permit number* to open the associated permit record.

Permit Number	Project	Address	Permit Type	Status
BLDC-000055-2019		1204 TREFOIL CT NAPERVILLE, IL 60563	Building (Non-Residential) - New Construction	Active
BLDC-000076-2019	Benton Heights	13 S Main St Naperville, IL 60540	Building (Non-Residential) - New Construction	Active

7. Select the number of permits to display on each page from the **Results per page** dropdown.

8. Use the **Page Navigation** buttons to move between pages of permits.

MY PLANS



Plan Number	Project	Address	Plan Type	Status
ANNX-000006-2019		407 E Bauer Rd Naperville, IL 60563	Annexation - Annexation	Active
PUD-000013-2020			Planned Unit Development - Preliminary	Recent, Pending

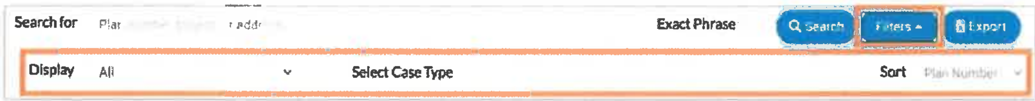
CSS allows users to view the details of a plan.

Follow the steps below to view plans:

Not all plan data is available to all users.

1. In the search field, type a specific project, address, or plan number to search. Click the *Search* button to locate plans that meet the search criteria.

2. Click the *Filter* button to expand the the search criteria.



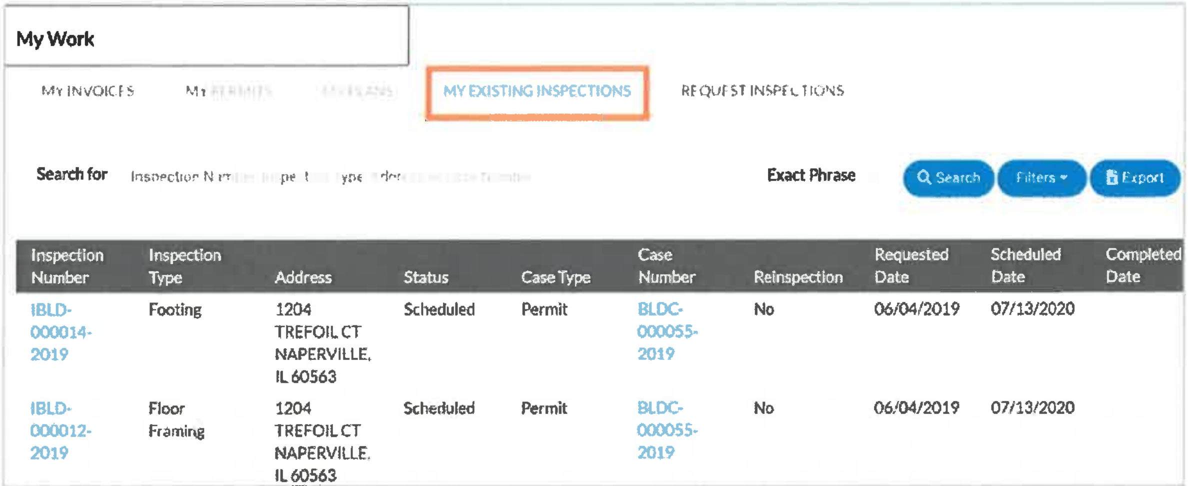
3. Click the *Display* dropdown to select and search by status.
4. Click within the *Case Type* field to search by a specific case type. The results will display in a dropdown for the citizen to choose from.
5. Click the *Sort* dropdown to sort the cases within the search.
6. Click a *Plan Number* to open the associated plan record.

7. Select the number of permits to display on each page from the **Results per page** dropdown.

8. Use the **Page Navigation** buttons to move between pages of plans.

MY EXISTING INSPECTIONS

Use this window to view, sort, and access all available inspections.



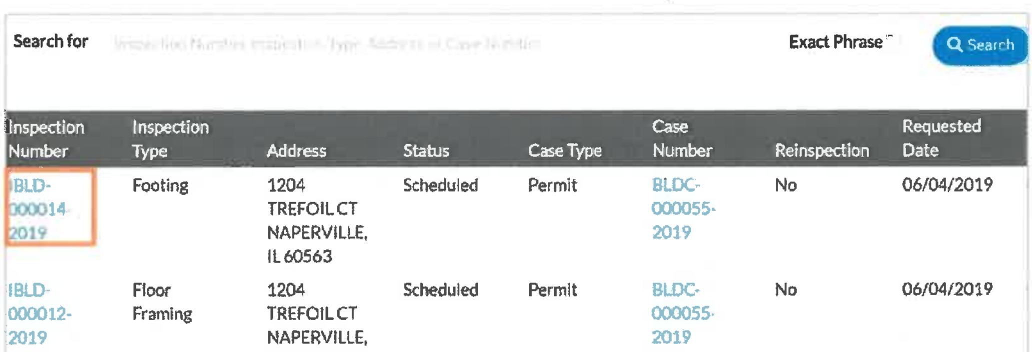
Inspection Number	Inspection Type	Address	Status	Case Type	Case Number	Reinspection	Requested Date	Scheduled Date	Completed Date
IBLD-000014-2019	Footing	1204 TREFOIL CT NAPERVILLE, IL 60563	Scheduled	Permit	BLDC-000055-2019	No	06/04/2019	07/13/2020	
IBLD-000012-2019	Floor Framing	1204 TREFOIL CT NAPERVILLE, IL 60563	Scheduled	Permit	BLDC-000055-2019	No	06/04/2019	07/13/2020	

Follow the steps below to view inspections:

1. In the search field, type a specific Inspection Number, Inspection Type, Address or Case Number to search. Click the *Search* button to locate inspections that meet the search criteria.

2. Click the *Filter* button to expand the the search criteria.

3. Click the *Display* dropdown to select and search by status.
4. Click within the *Case Type* field to search by a specific case type. The results will display in a dropdown for the citizen to choose from.
5. Click the *Sort* dropdown to sort the cases within the search.
6. Click an *Inspection Number* to open the associated Inspection record.



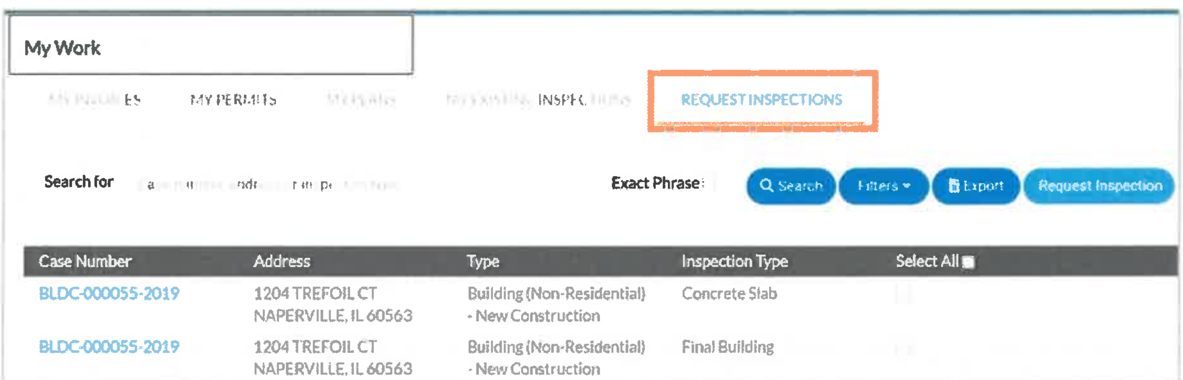
Inspection Number	Inspection Type	Address	Status	Case Type	Case Number	Reinspection	Requested Date
IBLD-000014-2019	Footing	1204 TREFOIL CT NAPERVILLE, IL 60563	Scheduled	Permit	BLDC-000055-2019	No	06/04/2019
IBLD-000012-2019	Floor Framing	1204 TREFOIL CT NAPERVILLE, IL 60563	Scheduled	Permit	BLDC-000055-2019	No	06/04/2019

7. Select the number of inspections to display on each page from the **Results per page** dropdown.

8. Use the **Page Navigation** buttons to move between pages of inspections.

REQUEST INSPECTIONS

CSS provides a great way for citizens to request inspections. Users must be logged in to CSS to request inspections, and they must be a contact associated with the case. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.

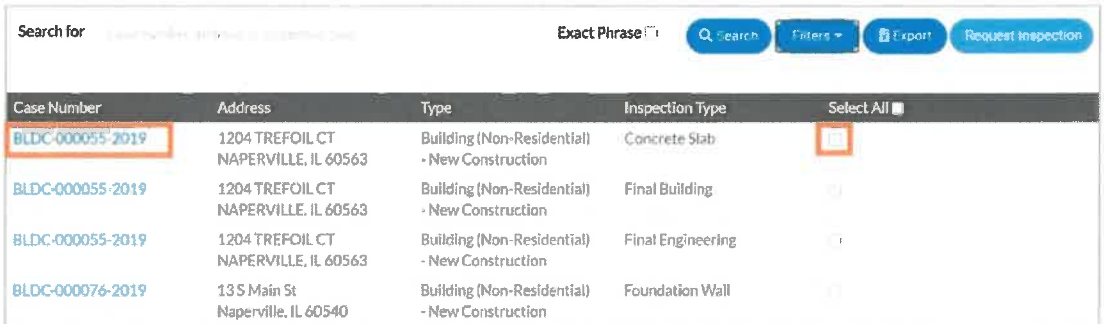


Follow the steps below to view inspections:

1. In the search field, type a specific Case Number, Address or Inspection Type to search. Click the *Search* button to locate inspections that meet the search criteria.

2. Click the *Filter* button to expand the the search criteria.

3. Click the *Sort* dropdown to sort the cases within the search.
4. Click a *Case Number* to open the associated record, or click the *checkbox(es)* next to the case(s) that inspections need to be requested for.



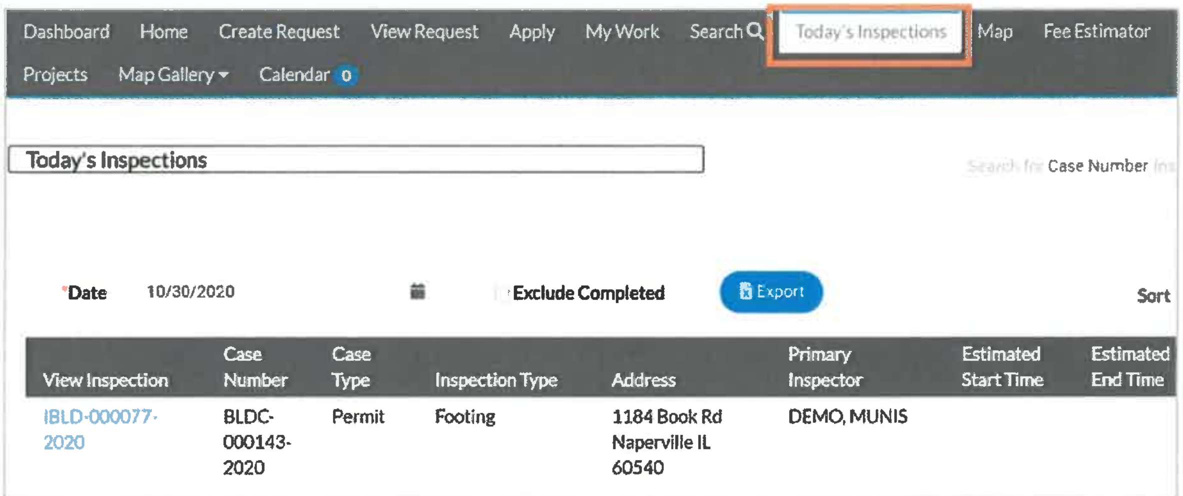
5. Click *Request Inspection* to open the Request Inspections window.

6. Select the number of inspections to display on each page from the **Results per page** dropdown.

7. Use the **Page Navigation** buttons to move between pages of inspections.

TODAYS INSPECTIONS

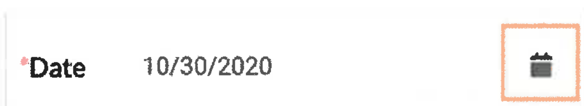
Use this window to view, sort, and access all inspections scheduled for a specific day.



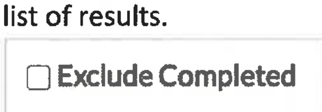
Follow the steps below to view inspections:

1. In the search field, type a specific Case Number, Address or Inspection Type to search. Click the *Magnifying Glass* to locate inspections that meet the search criteria.

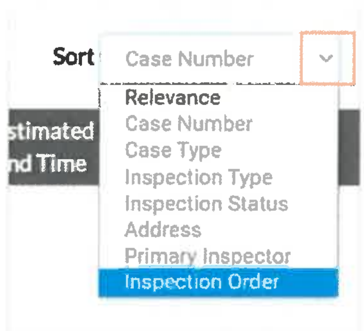
2. Click the *Calendar* icon to select the date to view due inspections or type the date in the Date field.



3. Click the *Exclude Completed* checkbox to exclude completed inspections from the list of results.



4. Click the *Sort* dropdown to sort the Inspections within the search.



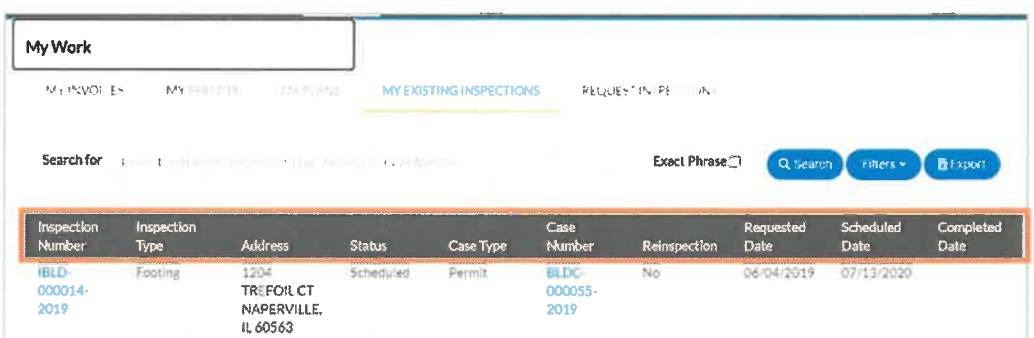
5. Select the number of inspections to display on each page from the **Results per page** dropdown.

6. Use the **Page Navigation** buttons to move between pages of inspections.

MANAGING AN INSPECTION

The citizen may navigate to an Inspection multiple ways; via the Parent case, clicking on a specific Inspection, from the Dashboard or searching for an inspection.

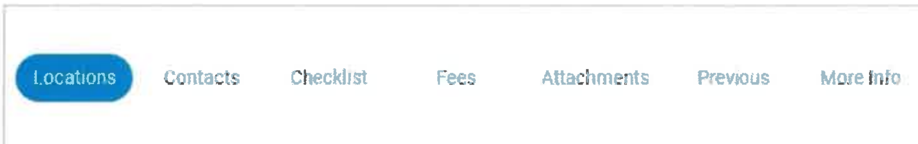
1. The main details of the Inspection are listed at the top of the screen and include: **Inspection Number,Inspection Type, Main Address, Inspection Status, Case Type (this may be Permit/License number), Reinspection Status, Requested Date, Scheduled Date, and Completed Date.**



2. Click the *Inspection Number* to view the Inspection Details.

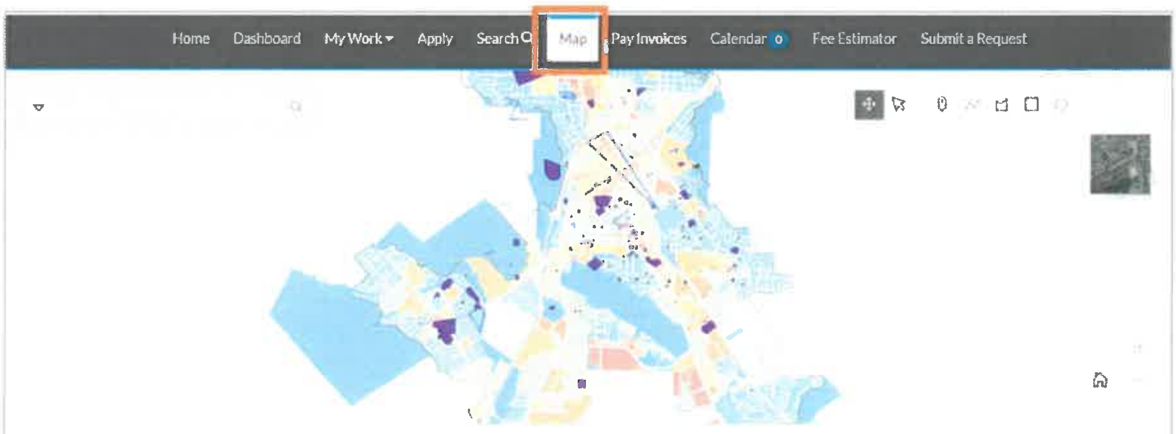
Inspection Number	Inspection Type	Address	Status	Case Type	Case Number	Reinspection	Requested Date	Scheduled Date	Completed Date
IBLD-000014-2019	Footing	1204 TREFOIL CT NAPERVILLE, IL 60563	Scheduled	Permit	BLDC-000055-2019	No	06/04/2019	07/13/2020	

3. The middle tabs within the Inspection will allow the citizen to manage/view the following: **Location, Contacts, Checklist Items, Fees, Attachments, Previous Inspections, and Additional Information.**



MAP

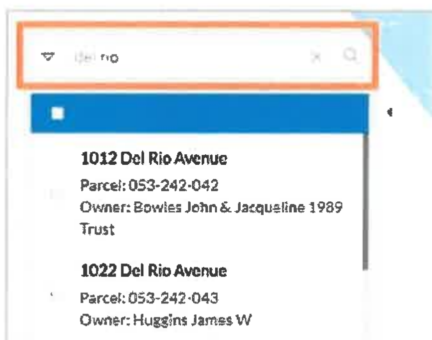
CSS integrates with ESRI's map functionality to allow for powerful searches, pinned results, applying for cases, EnerGov Enterprise Server data incorporation, GIS layers, and more. ArcGIS 10.3.1 or higher must be in place before beginning CSS installation.



Follow the steps below to use the CSS map:

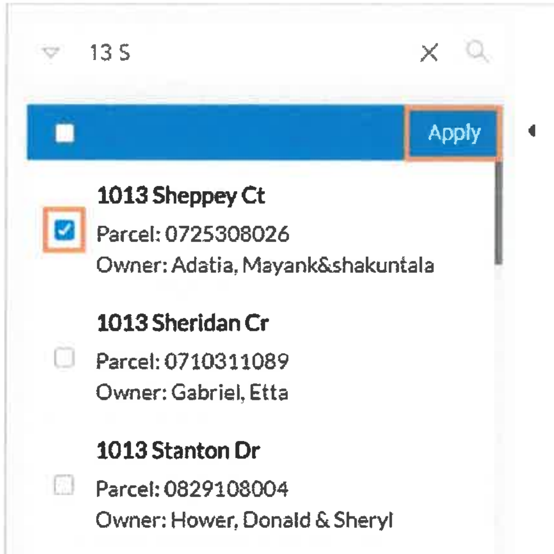
1. Click the *dropdown arrow* on the left to choose to search by: **All, Address or Parcels.**

2. Type an address or a parcel in the **Address & Parcel Search** field in the top, left corner of the map. This field will also allow partial information of the address. Results will auto-fill below the field.

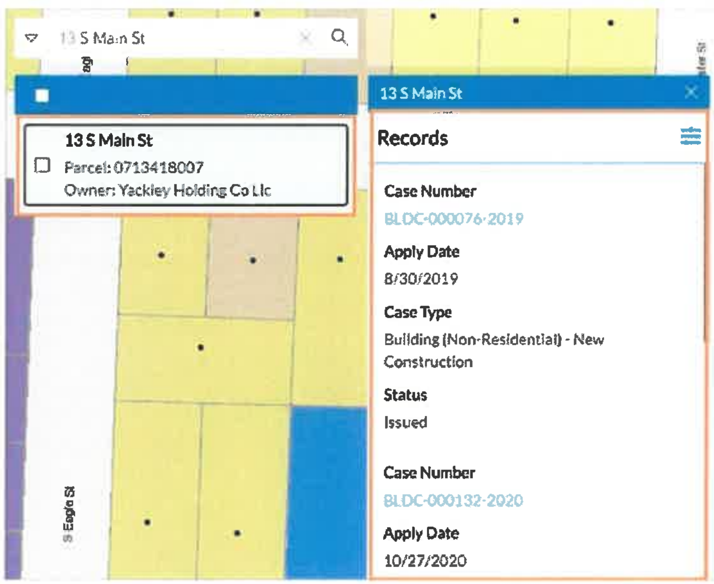


3. Click **Use Current Location** to use the current location that appears when you click in the search field.

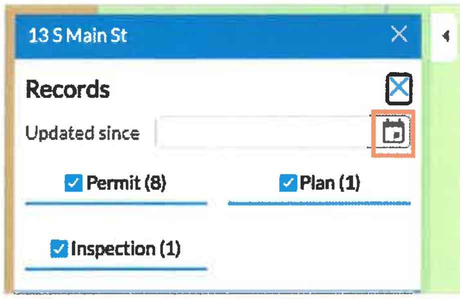
4. The citizen may chose from the list of addresses by clicking the *box* next to the desired address(es). The **Apply** button will appear in the blue ribbon. (See previous instructions on how to Apply for a case using the map.)



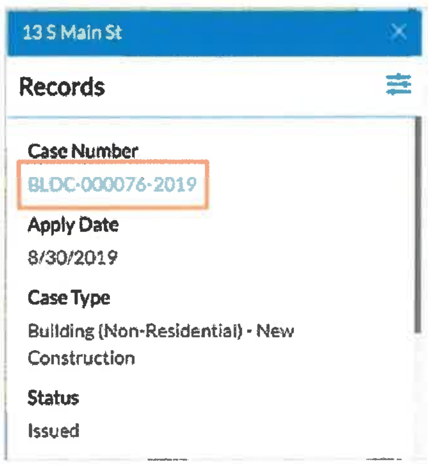
5. To see information related to a specific address or parcel, click into the box of the desired address or parcel. The information will show in a fly out to the right.



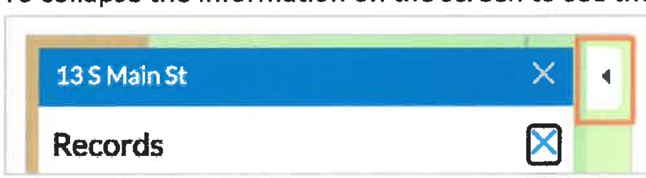
6. Click the *More Options* menu to access the Calendar to change the date range of information brought back.



7. Click the *Case Number* on the results that were returned.

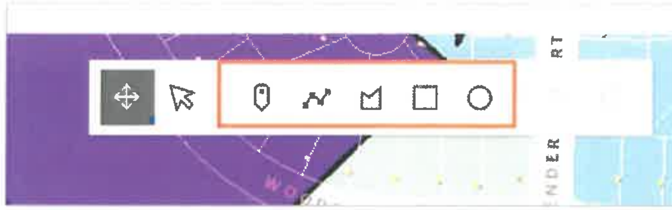


8. Another tab will open to show the details of the case.
9. To collapse the information on the screen to see the full map, click the arrow tab.

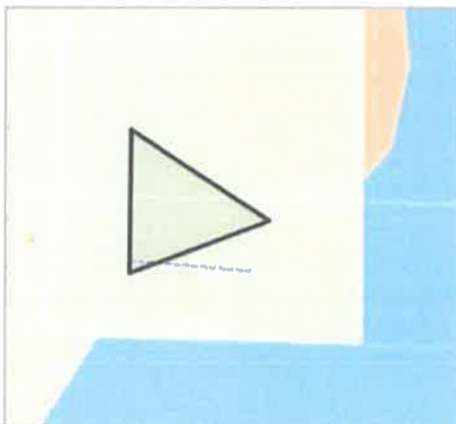


10. To clear all information given click the **X** in the blue ribbon or on the **Address & Parcel Search** field. The user may start their search anew.

11. To **Draw to Apply or Search,** navigate to the area of the map that the spatial collection will need to be drawn.
12. The tools to draw the feature are to the right of the screen.



13. Select the desired feature to draw a point, line, polygon, rectangle or a circle on the map.
14. Each single click will allow a turn of a line in the shape and a double click will allow the user to finish drawing the desired shape.

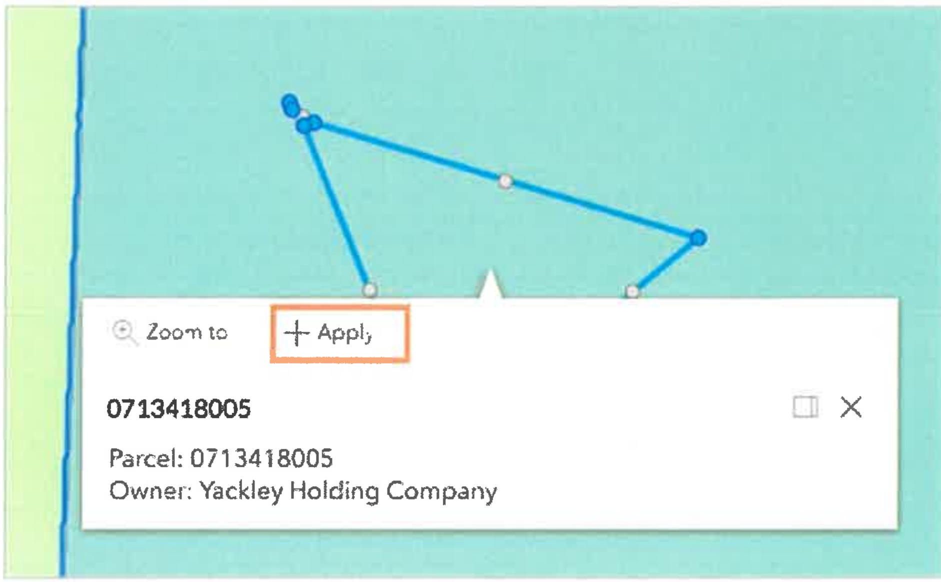


15. To transform the feature, click the *Transform* button.

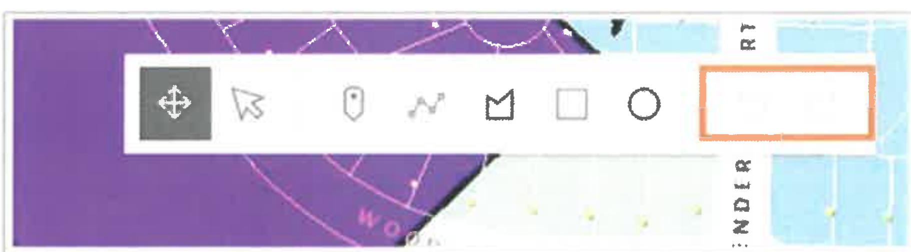
16. A box will appear around the feature and will allow the user to transform the original by moving the smaller white squares into the desired positions.

17. To Reshape the feature, click the *Reshape* button.

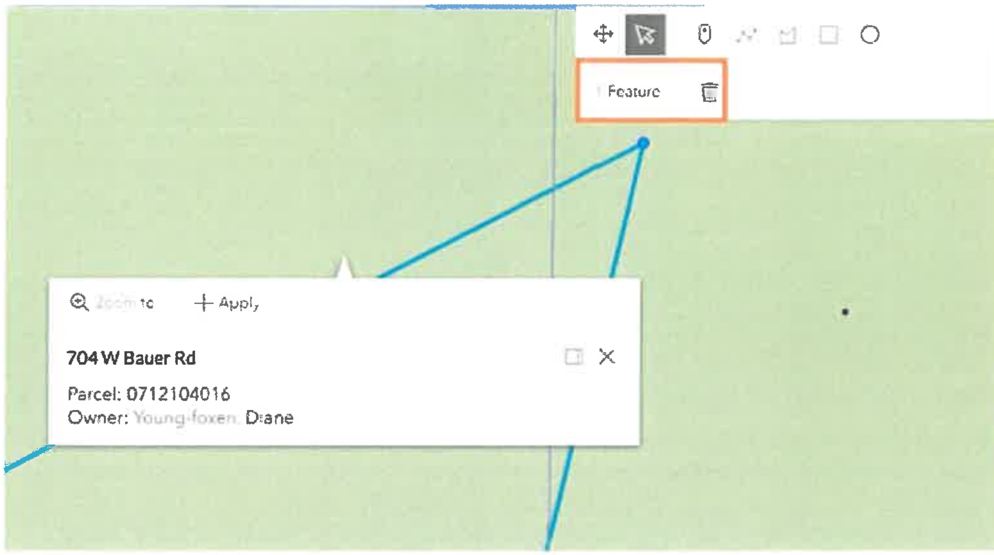
18. Small circles will appear on the feature and will allow the user to reshape the original by moving the circles into the desired positions.
19. Once done drawing and editing the feature, click on the desired *Spatial Collection* and click *Apply*, if you would like to use the feature to apply for a case.



20. To **Undo** a feature or **Redo** a feature, click the arrows pointing to the left or right on the right side of the drawing tools.

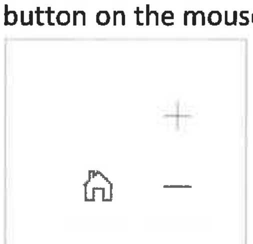


21. To Delete a feature, select a shape on the map, and a dropdown will appear under the drawing tools.
22. Click the *Trashcan* to the right of the **1 Feature** selected.



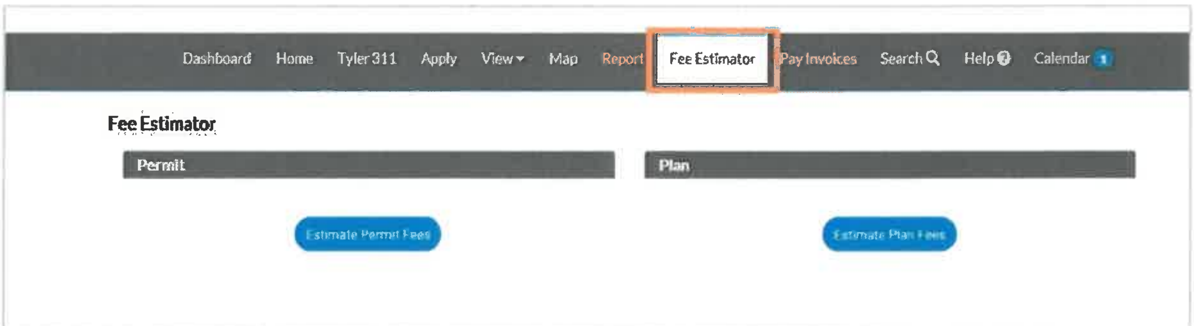
23. To toggle the basemap, click the *Square* to the right of the screen. This will toggle the basemap between the aeral view and the basemap view.

24. To return to the Default map view, click on the *Small House* icon found in the lower right corner of the screen.
25. To zoom in and out on the map, you may click the *Plus* or the *Minus* icon in the bottom right of the screen. Others ways to zoom on the map include: double clicking the left button on the mouse and using the roller ball on the mouse.

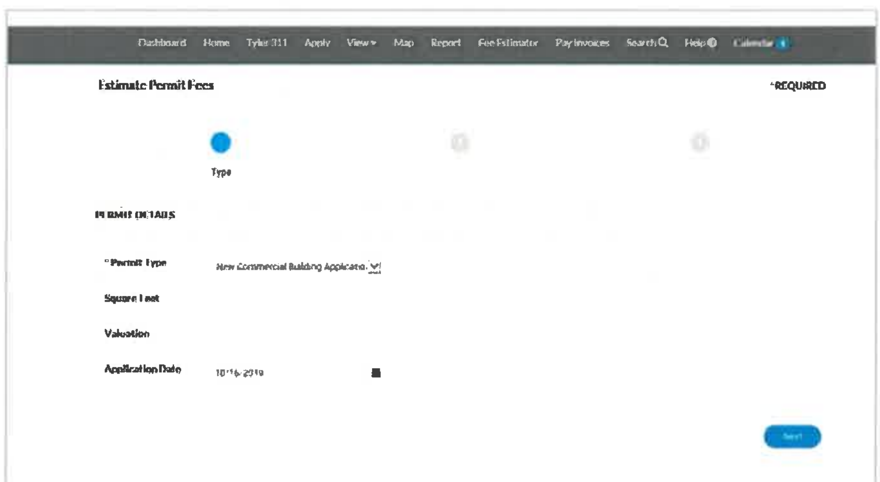


FEE ESTIMATOR

The Fee Estimator button may be used for specific Permit case types or Plan case types. The estimation can show fees based off of input from square feet, valuation and custom fields.



1. Click the *Estimate* button for the desired case type.
2. Fill in all applicable fields in the **Type** screen.

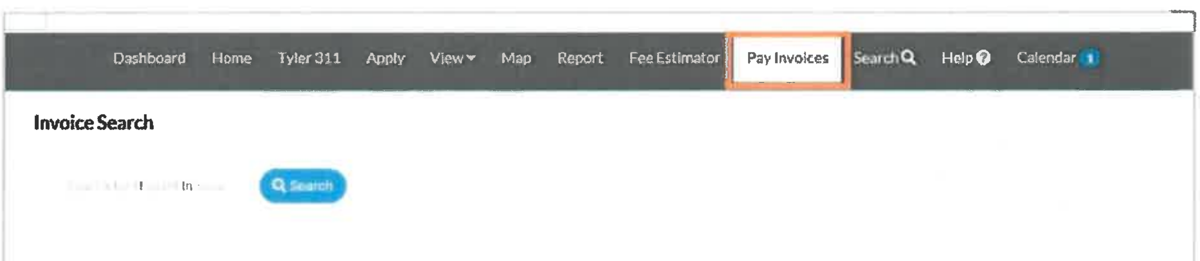


3. Click *Next*.
4. Fill in all applicable fields in the **More Info** screen.
5. Click *Next.*
6. The estimated fees will show on the **Review and Submit** screen.

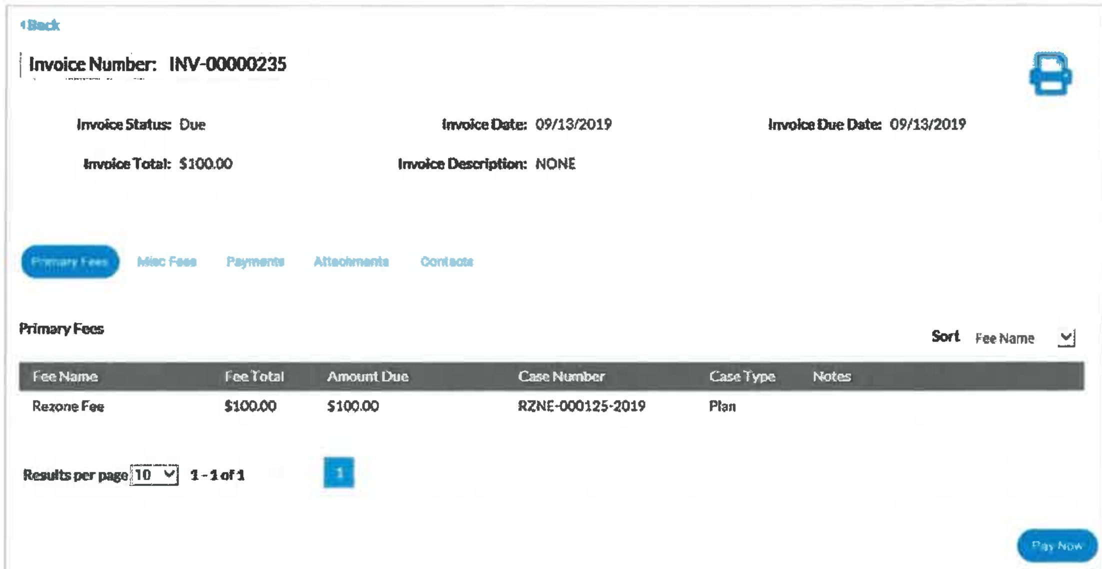
7. Click the *Apply* button to apply for the case. If not logged in, CSS will prompt you to log in.

PAY INVOICES

Pay Invoices may be accessed from the Home screen or the Pay Invoices button on the top ribbon.

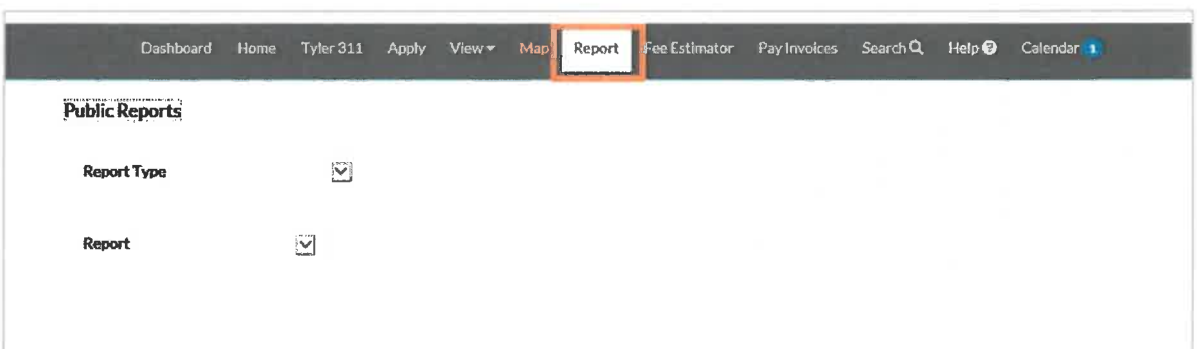


1. Enter in the **Unpaid Invoice** number. Example: INV-000024
2. Click *Search*.
3. The **Invoice Number** screen will appear with the desired invoice.

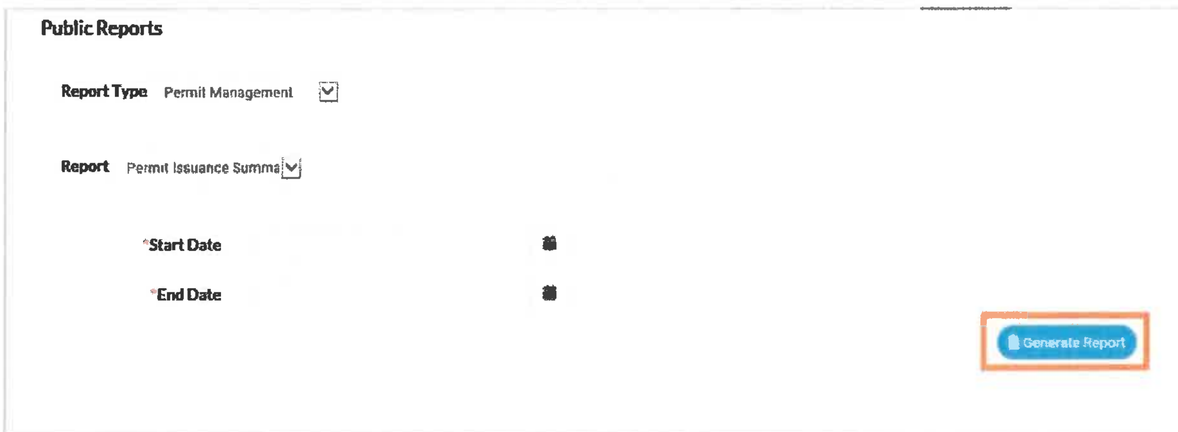


PUBLIC REPORT

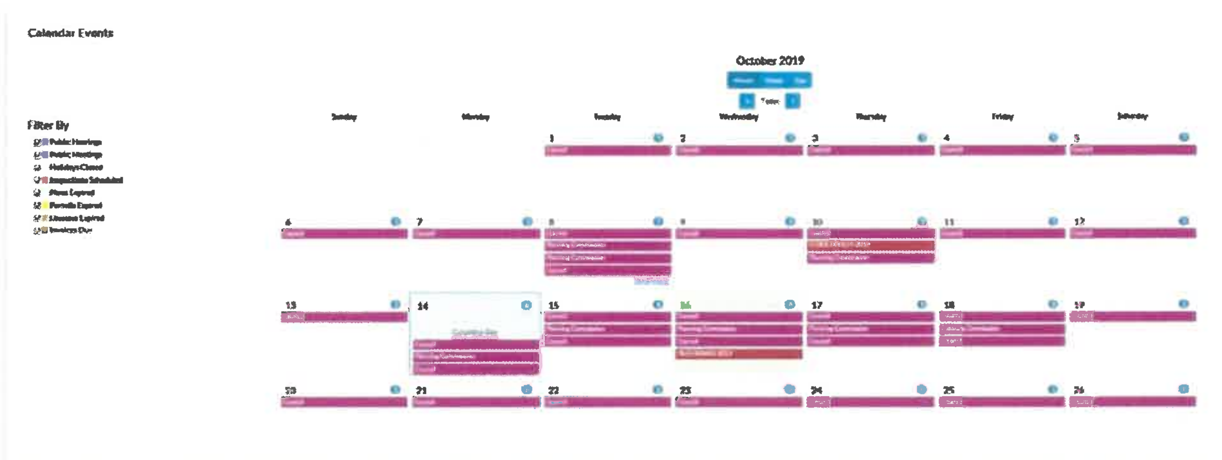
The Report button will allow citizens to access public facing documents and reports from different modules.



1. Click the *Report Type* dropdown and select the desired module type.
2. Select the desired **Report** from the second dropdown.
3. Enter in a **Start Date** and an **End Date**.
4. Click *Generate Report*.



CALENDAR



The Calendar will show **Public Hearings, Public Meetings** and **Holidays** based on configuration in EnerGov. These categories are visible to all that are logged in or not. Once logged into CSS, the citizen will be able to see **Inspections Scheduled, Plans Expired, Licenses Expired, Permits Expired** and **Invoices Due** dates in addition to the **Hearings, Meetings** and **Holidays**. The citizen may click on the desired event and information with links will show on the right of the screen.

ADA COMPLIANT

CSS and CSS Administration are Americans with Disabilities Act (ADA)-compliant at the WCAG 2.0 AA level. Numerous features are designed to make the site accessible to individuals with various impairments. For the "Speak to Read" feature to work in CSS, Chrome Vox will need to be installed. ChromeVox is an extension for Chrome on Windows and Mac OS X which operates as an alternative screen reader for Web content. ChromeVox speaks the content of the page, plays audio indicators for page load progress and objects on the page, and provides a way to navigate all web content from the keyboard.

This feature may be installed from: http://www.chromevox.com/installing.html

Note: Please see other guides for CSS for information on Business License application, Tax Remittanence and Business Liences Renewal through CSS.