

Supplementary Process Guide

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Tyler Documentation21

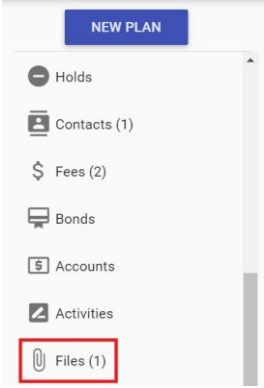
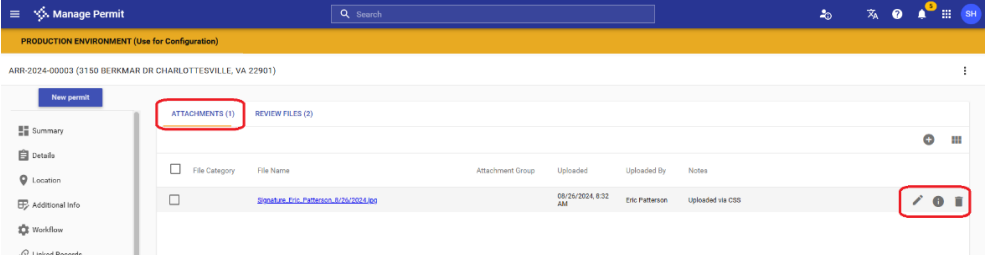
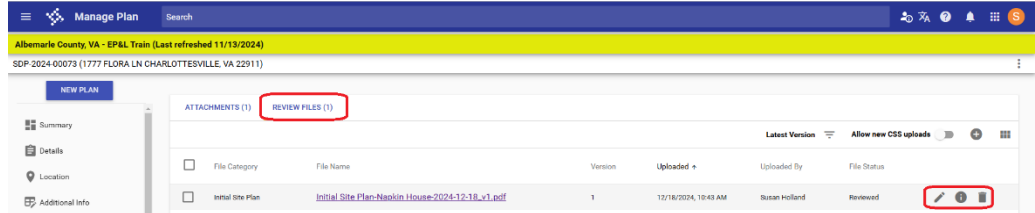
Version Control

Version	Date	Author	Summary of Changes
0.0	August 20, 2024	Cory Spera	Initial draft
0.1	October 31, 2024 – November 4, 2024	Susan Holland	Added additional notes/screenshots Organized
0.2	November 8, 2024	Susan Holland	Further edits to clarify steps Updated screenshots
0.3	January 2, 2025	Susan Holland	Added version control page Verified steps/screenshots Verified links

Attachments/Uploads

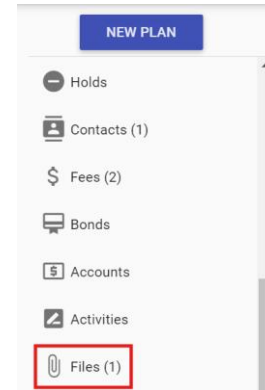
The **Files** tab on an application displays all documents related to the application. Staff can also upload new documents.


View Attachments/Review Files

<p>1. In the left toolbar of an application, select Files</p>	
<p>2. Select Attachments tab to view document(s) that are not part of a review (ex. Signatures) 3. Use the icons next to each attachment to update, identify, or delete.</p>	
<p>4. Select Review Files tab to view document(s) that are part of a review (ex. Site Plan) 5. Use the icons next to each attachment to update, identify, or delete.</p>	

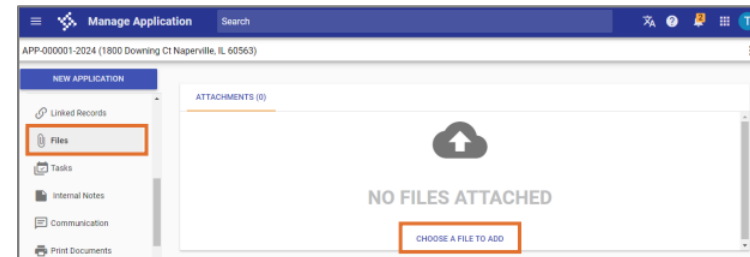
Upload Documents

1. In the left toolbar, select **Files**

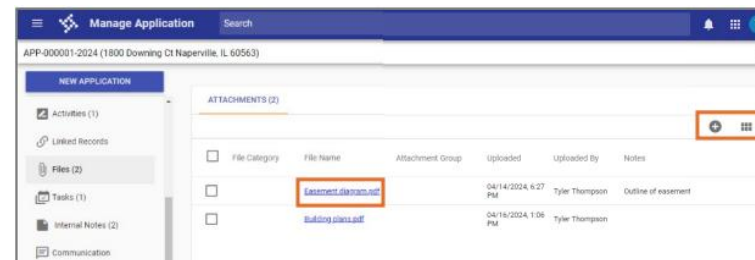


2. Select **Attachments** tab
 - a. If there are *no* existing attachments, select **Choose File to Add**
 - b. If there *are* existing attachments, select 

No existing attachments



Existing attachments



3. Either drag a file or choose a file to upload

Attach Files



Drag a file here

or
CHOOSE A FILE TO UPLOAD

CANCEL ATTACH

4. To make the upload visible in Civic Access:
 - a. Select **Category/Group**
 - b. Select **Available Online**
5. Select **Attach**
6. Select **SAVE**

*Note: **Available Online** makes the document available to **everyone** including the general public.*

Category/Group

Attach Files



Drag a file here

or
CHOOSE A FILE TO UPLOAD

File Name	Category/Group	Notes
upload.png (1 MB)		

CANCEL ATTACH

Available Online

Attach Files



Drag a file here

or
CHOOSE A FILE TO UPLOAD

File Name	Available Online	Notes
upload.png (1 MB)		

CANCEL ATTACH

Tyler Documentation

- [Manage Application User Guide](#)

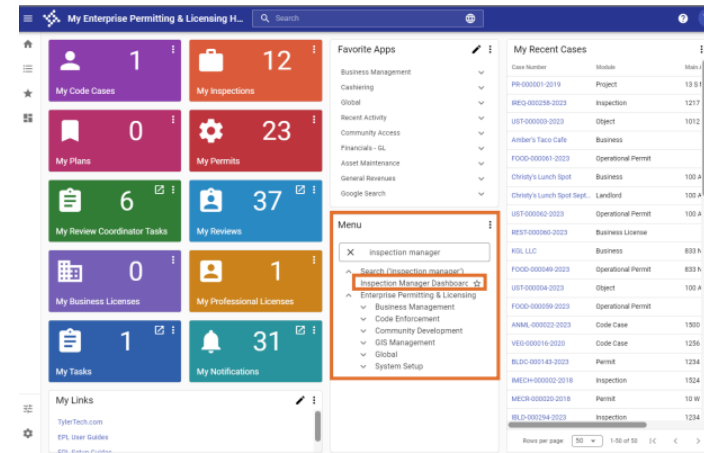
Inspections

Inspection requests can be received through 311, by phone, by email or in person. Most inspections are attached to a specific application.

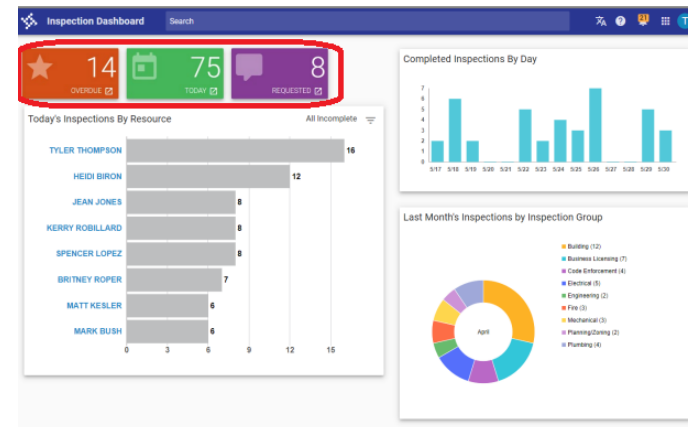
Inspection Manager Dashboard





1. On the Hub, search in the Menu for **Inspection Manager Dashboard**

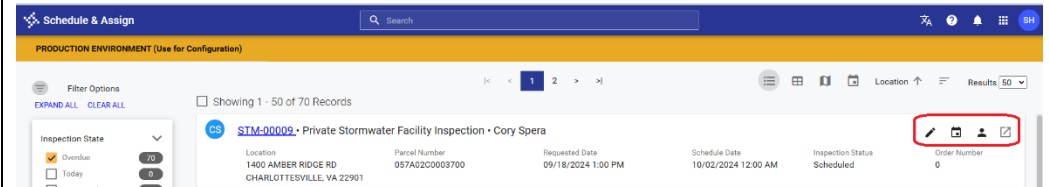
*Note: This is available to **all** users. However, only Managers can see inspections for all team members.*



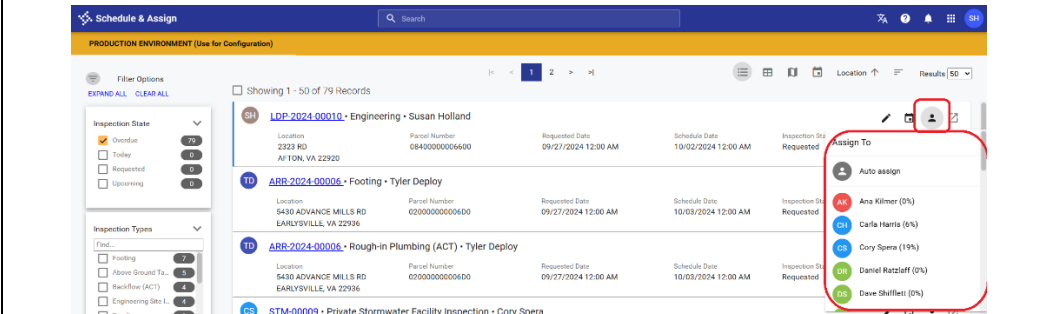
2. On the dashboard, select any one of the following:
 - a. **Overdue**
 - b. **Today**
 - c. **Requested**
 - d. An Inspector in the **Today's Inspections By Resource** list



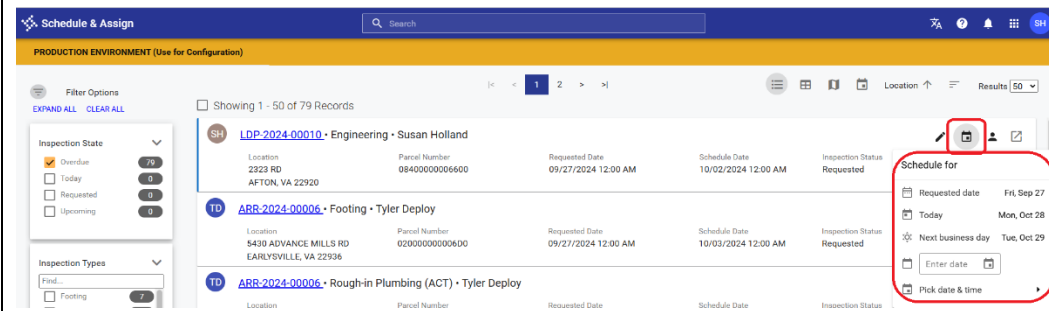
3. Each inspection shown displays these icons:
-  - Select to update status
 -  - Select to change scheduled date/time
 -  - Select to manually or automatically assign an inspector
 -  - Select to view the inspection



4. **Lead Inspector** assigns an inspector, changes primary inspector and/or assigns additional inspectors



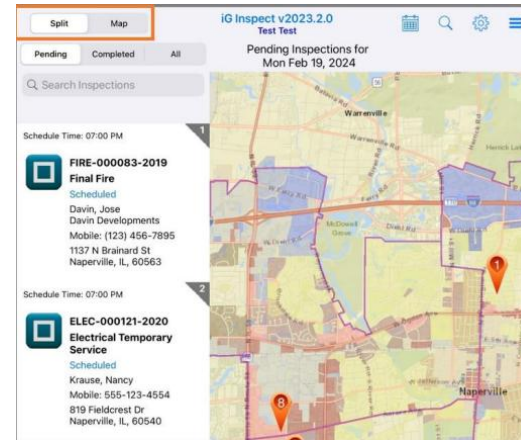
5. **Lead Inspector** schedules the date and time of the inspection



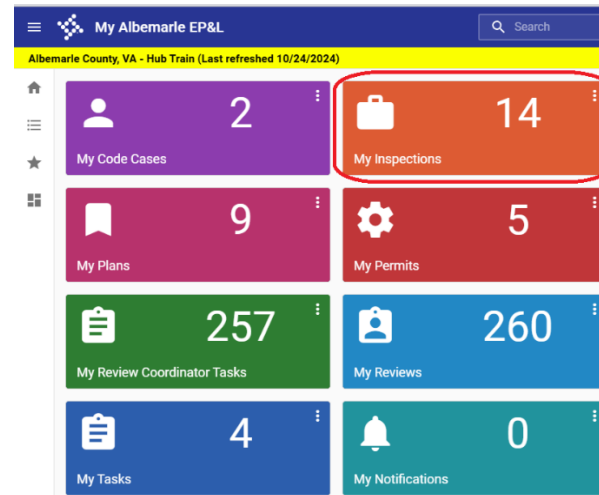
Manage an Inspection in EP&L

1. There are two ways to manage an inspection:
 - a. In the field: use the [IG Inspect SOP](#)
 - b. In the office: select **My Inspections** on the Hub

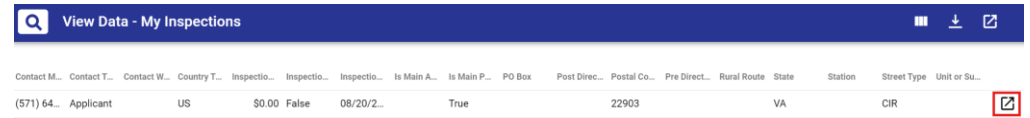
IG Inspect App



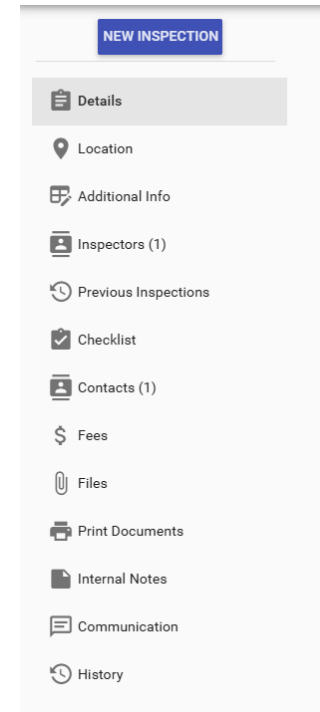
My Inspections



2. From the EP&L **My Inspections** card, select  for a specific inspection



3. In the inspection, use the left menu to do more such as:
- Details:** Update the status, scheduled time and actual time
 - Previous Inspections:** Helps determine if this is a reinspection
 - Checklist:** Comments are **visible to the general public.**
 - Files:** View or upload photos. Note that photos here are attached only to the inspection and **not** the application
 - Internal Notes:** Add useful information such as the gate code.



4. If the inspection **is passed**, select a status of **Approved** or **Complete**.

5. If the inspection **does not pass**, select a status of **Reinspection Required**
 - a. A v2 of the inspection is created
 - b. The applicant is notified
 - c. The inspection is no longer visible to the inspector
 - d. The applicant must request a reinspection which will be automatically assigned as appropriate.

Tyler Documentation

- [Inspection Manager Dashboard User Guide](#)
- [Inspections Mobile User Guide](#)
- [Manage Inspection User Guide](#)

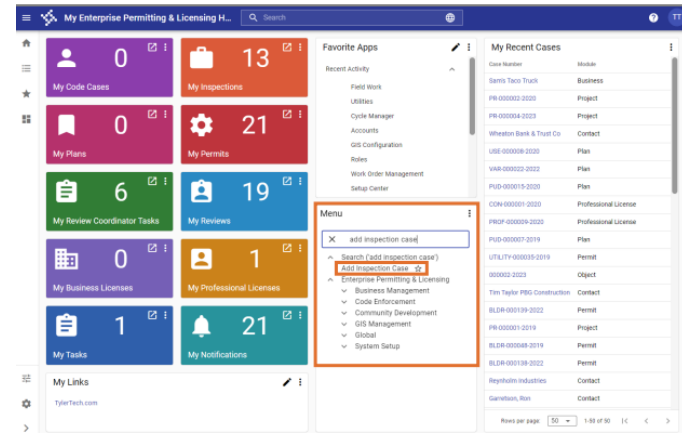
Inspection Cases

Inspection cases are only created to automatically schedule **recurring** inspections.

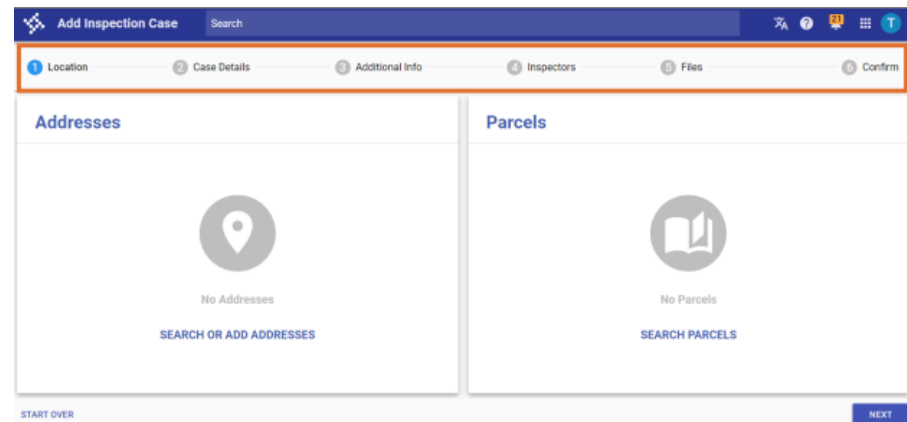
Create an Inspection Case from the Hub

1. Search the Hub menu for **Add Inspection Case**

*Note: The case will be attached to an address or parcel but **not** an application*



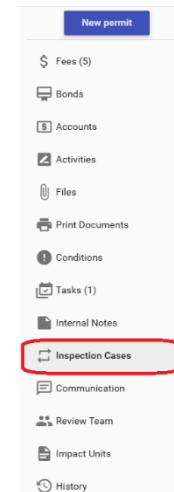
2. Complete required fields on all tabs



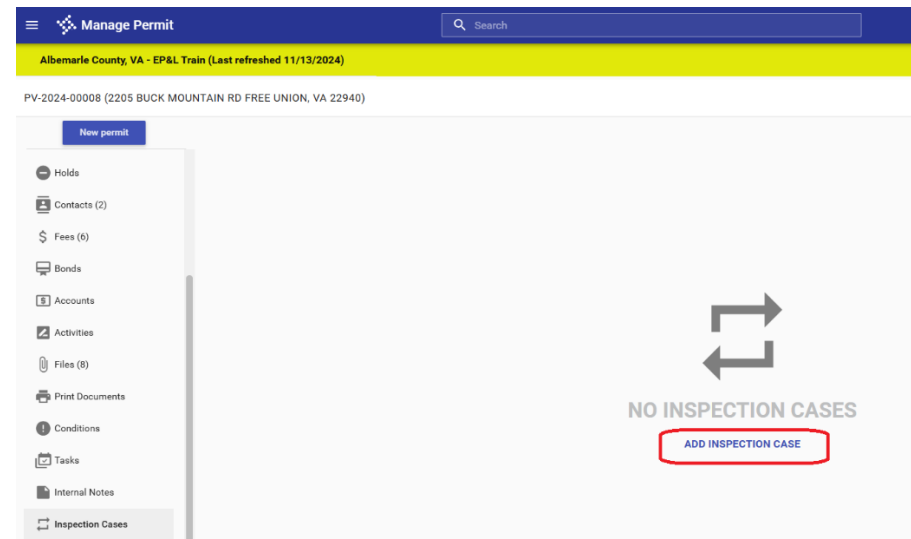
Create an Inspection Case from an Application

1. In an application, select **Inspection Cases** in the left menu

Note: The case will be attached to an application

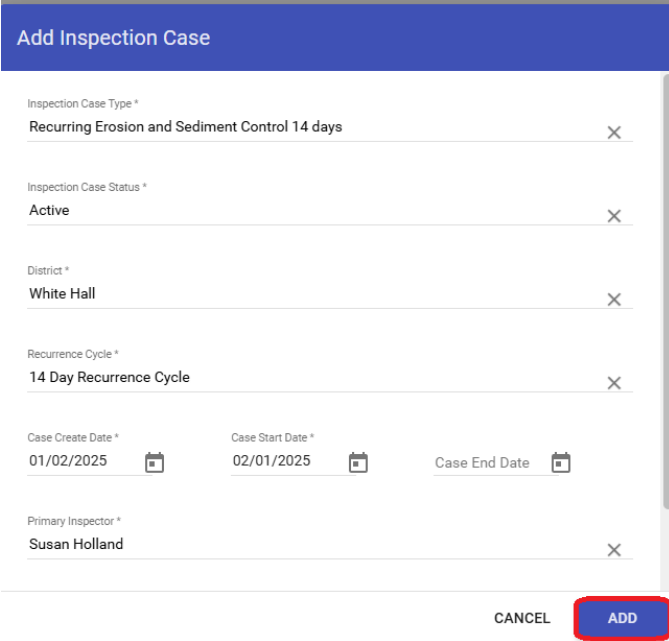


2. Select **Add inspection Case**



3. Complete all fields in the **Add Inspection Case** popup

4. Select 



Add Inspection Case

Inspection Case Type *
Recurring Erosion and Sediment Control 14 days

Inspection Case Status *
Active

District *
White Hall

Recurrence Cycle *
14 Day Recurrence Cycle

Case Create Date * 01/02/2025 Case Start Date * 02/01/2025 Case End Date

Primary Inspector *
Susan Holland

CANCEL ADD

Tyler Documentation

- [Add Inspection Case User Guide](#)
- [Manage Inspection Case User Guide](#)

Reviews

For Review Coordinators

- Use the [Review Coordinator SOP](#)

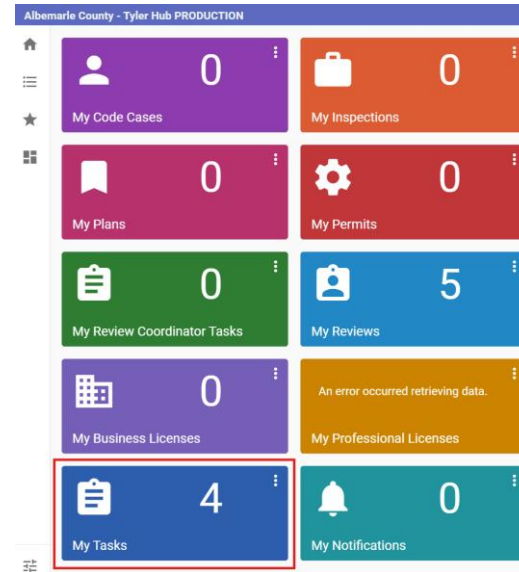
For Reviewers

- Use the [Reviews SOP](#)

Tasks


Manage Tasks

1. Select **My Tasks** on the Hub



2. Select **Open My Task** link on a task

Task Cas.	Task Type	Task Statu.	Task Subject	Task Body	Task Start	Task Due D.	Task Comp.	Task Priority	Task Assig.	Task Percent	Module Na.	Task Creat.	Task Case Id	View Paren	Task App U.	Task App Link
ACE-20...	Other	Not Start...	Miscellan...	Miscellan...	04/17/20...			Normal	Cory Spe...	0	Plan Man...	Tyler Depl...	2115867...	https://al...	https://al...	Open My Tasks
CDDINQ...	Other	Waiting o...	Miscellan...	Miscellan...	07/11/20...			Normal	Cory Spe...	0	Plan Man...	Susan Ho...	2232d2f7...	https://al...	https://al...	Open My Tasks
CDDINQ...	Other	In Progress	Miscellan...	Miscellan...	07/11/20...			Normal	Cory Spe...	0	Plan Man...	Susan Ho...	2232d2f7...	https://al...	https://al...	Open My Tasks
ZMA-20...	Generate ...	Not Start...	Generate ...	Need to ...	08/20/20...	08/25/20...			Cory Spe...	0	Plan Man...	Cory Spera	10bb8a...	https://al...	https://al...	Open My Tasks

3. Select  to launch a task

Subject ↑	Status	Open Task Target	Assigned To	Created By	Due date
Generate Mailing List	Not Started	ZMA-2024-00008	Cory Spera	Cory Spera	08/25/2024
Miscellaneous task type	Not Started	ACE-2024-00002	Cory Spera	Tyler Deploy	
Miscellaneous task type	Waiting on Someone Else	CDDING-2024-00015	Cory Spera	Susan Holland	
Miscellaneous task type	In Progress	CDDING-2024-00015	Cory Spera	Susan Holland	

4. Update the **Task Status** as you work the task

5. Select  to save task status

Task Type*
Generate Mailing List


Start Date: 8/20/2024
Due Date: 8/25/2024
Complete Date: 8/20/2024

Subject*
Generate Mailing List

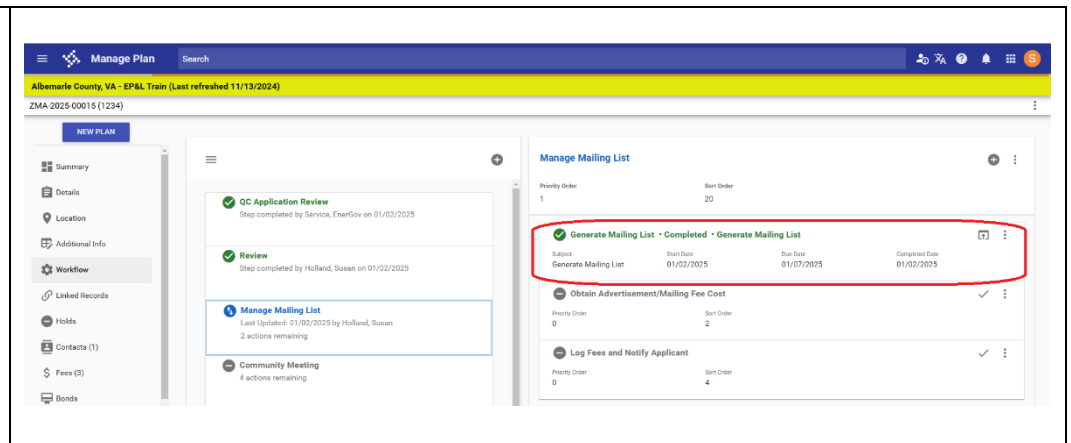
Body
Need to Generate Mailing List for Planning Case.

Assigned Users
Spera, Cory

Task Status: **Completed** | Task Priority: | Percent Complete: 0 | Show On Calendar:

CANCEL 

6. When the **Task Status** is **Completed**, the task displays green in the workflow

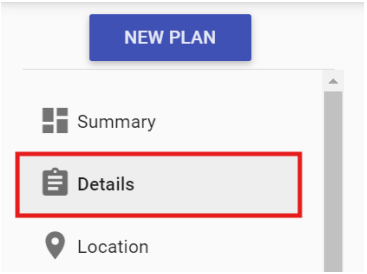
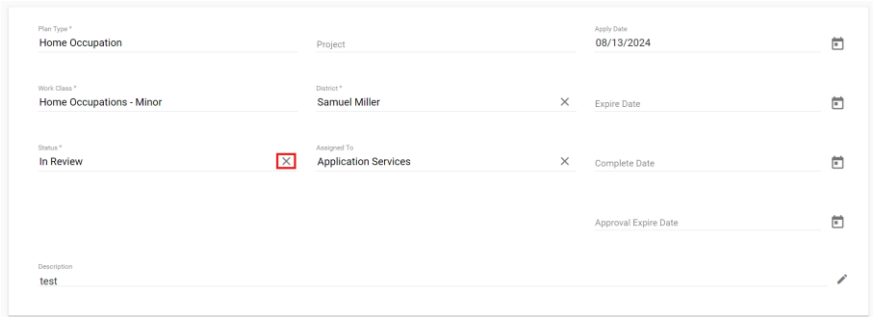


Tyler Documentation

- [Common Components Guide](#)

Update Status

An application's status can be updated manually. Some statuses update the **Completed Date** or **Final Date**.

<p>1. In the left menu of an application, select Details</p>	 <p>A screenshot of a software interface showing a left-hand navigation menu. At the top is a blue button labeled 'NEW PLAN'. Below it are three menu items: 'Summary' with a grid icon, 'Details' with a document icon (highlighted by a red rectangular box), and 'Location' with a location pin icon.</p>
<p>2. In the Status field, select X or the dropdown arrow</p>	 <p>A screenshot of an application form with several fields. The 'Status' field is highlighted with a red box and contains the text 'In Review'. To its right is a dropdown arrow. Other fields include 'Plan Type*' (Home Occupation), 'Project' (Samuel Miller), 'Apply Date' (08/13/2024), 'Work Class*' (Home Occupations - Minor), 'District*' (Samuel Miller), 'Assigned To' (Application Services), 'Complete Date', 'Approval Expire Date', and 'Description' (test).</p>

3. Select the appropriate status from the dropdown menu.

4. Select 

CHARLOTTESVILLE, VA 22903

SAVE CANCEL

Plan Type * Home Occupation Project Apply Date 08/13/2024

Work Class * Home Occupations - Minor District * Samuel Miller X Expire Date

Status * Accepted Adopted Approval Expired Approved Bond Released X Complete Date Approval Expire Date

Tyler Documentation

- [Manage Application User Guide](#)