Software Consulting Associates

User Guide

Building, Planning and Zoning – Complete Parcel Management
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QUICK REFERENCE

How Do I...

How do I add Tasks?
How do I add Parcel Inspections?
How do I add variances?
How do I add conditions?
How do I audit?
How do I add Notes and Documents?
How do I access and search online code?
How do I generate abstract letters?
How do I add documentation to meetings?
How do I add a Contact?
How do I add a Company?
How do I print a receipt?

ABOUT SOFTWARE CONSULTING ASSOCIATES
INTRODUCTION

HELPDESK

If you have any problems with Municity that users can’t solve with the information in this guide, please contact the Municity team:

PHONE: 845-758-0104

The Help Desk is open from 8:00 AM to 5:00 PM (Eastern Time), Monday through Friday.

WHAT IS MUNICITY?

Municity™ is a complete solution for municipal Building, Planning & Zoning Departments that links popular document management software, local building and zoning codes, and all related records that must be archived. It can assist municipalities of all sizes to management code enforcement and development projects more effectively and created faster, easier access to important information and enhance services to their constituents.

MUNICITY PROVIDES...

BUILDING DEPARTMENT WORKFLOW MANAGEMENT

Comprehensive tracking of all Building Department information, providing access to permits, complaints, inspections, variances, pictures, and reports that allow users to track parcel history.

EASY ACCESS TO HISTORICAL RECORDS

If your municipality uses General Code Laserfiche® document management software, users can instantly connect to a full selection of related documents, including permits, inspections, titles, deeds and other documents specifically related to building and zoning codes.

INTEGRATED BUILDING AND ZONING CODES

Allows citation directly from electronic building and zoning codes and creates easy access to up-to-date ordinances and codes.

FIELD ACCESS OPTIONS

Instant field access to permit and building data allows issuance of inspection reports on the spot and maximizes efficiency in report creation and management.
USING THIS GUIDE

When Municity is installed, General Code works with municipalities to load current parcel data into the system, as well as customize menus and options based on the way the municipality works. As a result, some illustrations in this guide may not precisely match what users see on your screen.

NOTE: The access individual users and user groups have to view and edit data in Municity is set by the administrator. As a result, users may not be able to use all of the functions or carry out all of the activities described in this user guide.

GETTING STARTED

LOGGING IN

To log into Municity, users must have a USER NAME and PASSWORD set by the administrator. If you do not know your user name and / or password, contact your system administrator.

TO LOG IN:

1. Launch the program by clicking on the desktop icon
   - Users can also select Municity from your Start > Programs menu
2. Select your user name from the pull down menu.
3. Type your password in the password box.
4. Click OK.

If you don’t remember your password:

- Clicking Password hint? opens a text box that has a hint, also set by the administrator, leading to the password.
- Clicking Forgot Password? will send an e-mail to your account with your password on it.

MUNICITY SECTIONS

Municity has seven main sections: the Overview and six functional sections. Municity opens in the General view of the Overview screen.

OVERVIEW

The Overview section lets users access schedule and communications in the system.

The other sections are:
BUILDING DEPARTMENT

The Building Department section tracks parcel histories and is used to generate building application, permits and certificates.

FIRE / SAFETY

The Fire / Safety section consolidates fire and safety inspections and complaints from other sections to easily track scheduling and compliance.

PLANNING

The Planning section documents and tracks building projects.

ZONING

The Zoning section documents and tracks zoning applications and permits.

MEETINGS

The Meetings section is used to schedule meetings, document agendas, and record minutes and other results.

CHARGES & PAYMENTS

The Charges & Payments section consolidates payments and fees from other sections, and can be used to generate and track additional fees.

REPORTS

In the Reports section, users can set up and generate reports using data from throughout Municity.

ADMIN

The Administration section used by the system administrator to set up and maintain Municity. The Admin icon may not be visible to all users.

TERMINOLOGY

These are the terms used in this guide to refer to different parts of the Municity screen.
THE MUNICITY SCREEN

The layout of the Building Department, Planning, and Zoning screens are similar.

MENUS AND SECTION ICONS

Menus and Section Icons are used to navigate among the main sections of Municity.

SECTION BUTTONS

Section Buttons are used for basic tasks.

REFERENCE PANE

The Reference Pane in the Building Department, Planning, and Zoning sections allow quick access to searches and recent work.

NOTE: To turn off the reference panel and gain more room for the other screens, unselect the reference panel from the View button.
CONTENT PANES

The Content Pane is where users do their work. It displays and provides access to the various Municity functions.

TABS

Tabs are used to navigate among information in each section. Tabs also show up in some of the pop-up windows.

DETAIL TABS

Detail tabs are where users capture comprehensive information about a property, project or application, as well as other facts. Detail tabs change the content window, although it remains under the same tab. Detail tabs are only in certain tabs and some pop-up windows.

SEARCHING OVERVIEW
Municity offers many ways to search for desired information, including quick searches for current or “top of mind” projects, along with other options for more in-depth searches.

**QUICK SEARCHES**

The Reference Pane of the *Building Department*, *Planning*, and *Zoning* sections have a *Recent* pane that lists recently accessed information. To sort the recent pane, click the desired heading. These three sections also have quick search windows at the bottom of the reference pane. (If the search window is collapse / minimized, click on the button.) The quick searches depend on the section users are in.

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Enter the search item in the appropriate window and hit the >> button or the *Enter* key and that item will load.

**NOTE:** Municity searches according to how items are entered in the system. For example, if an owner’s name is listed as John Smith, a search on “Smith” won’t locate it. If more than one item fits the parameter, the Detailed Search window opens listing the items that match the search term.

**DETAILED SEARCHES**

Clicking on the *Search* section button or the Magnifying Glass icon on the right side of the *Content Pane* opens the detailed search window. The *Locate a Parcel* window enables users to search on other parameters, including:

**PARCEL INFO**

- Parcel ID
- Legal Address
- Street Name
- Owner Name
Other (pull down of available field names – NOTE: takes a while to populate)

PERMIT INFO

- Permit or application number and type

BUSINESS / OCCUPANT

- Names or addresses of recorded property residents or businesses

The Fire / Safety and Charges & Payments sections have search filters to help users find items in those sections. These are covered in detail in those sections.

MUNICITY AND MICROSOFT OUTLOOK®

Municity’s scheduling and messaging functions are linked to Microsoft Outlook if it is loaded on your PC. This means that notes sent or received through Municity go through your regular e-mail. In addition, any tasks and reminders also appear on your regular Outlook calendar and task list, as well as within Municity.

MUNICITY AND LASERFICHE®

If your municipality already uses Laserfiche Document Imaging System, Municity can be configured to utilize Laserfiche to store, search and access documents.
OVERVIEW SECTION

The Overview section helps users see at a glance their schedule, messages, and tasks, related to activities generated or tracked through Municity.

MODULE BUTTONS

GENERAL

The General button allows users to access:

- Contacts
  The contact list of individuals
- Companies
  The list of associated companies
- Liability / Workers Comp Notices
  Clicking the button allows users to print—but not view or change— the notices they exist in the system.

Both the Contacts and Companies list are searchable.

VIEW

The View Button has two options:

- Overview Reference Panel
  This toggles whether or not the Reference panel to the left of the screen is visible
- Reminders
  This opens the Reminders window

SEND A NOTE

Clicking this button opens a window that allows users to send a note via e-mail.
To complete the note:

1. Type the email address of the recipient or click the button to select a recipient from the contacts list.
2. Fill in your email address.
3. Write the note.
4. Click the Send Note button

The note will be delivered to the recipients Municity Notes section or email server.

**CODES**

This is linked to code reference material on your computer or via the internet.

1. Click on the Codes button in the view menu.
   - A drop-down will allow users to select from the codes available in the system.
2. Users can copy and paste any text, as needed, from the code to a note, permit, or other document.

**NOTE:** the Codes interface is set in the of Program Options of the Admin Section

**REFERENCE PANEL**

The Overview Reference Panel contains basic information about your Municity installation, including the recorded municipality, version and technical support contact information
**GENERAL PANEL**

The General Panel contains three links that users can use to contact Software Consulting Associates to find out about new Municity features or to give feedback.

**APPOINTMENTS**

The Appointments panel shows your scheduled events made through Municity.

**TO CHECK YOUR SCHEDULE**

The Appointments bar in the Overview screen shows events scheduled through Municity. To view your events:

1. Click on the **Appointments** bar.
2. Make sure your user name is selected in the user pane on the left of the calendar.
   - Depending on User Level, users may have access to other people’s calendars.
3. Click on the icon for the view users want to see: Day, Week, or Month

   ![View Options](image)

4. Click the triple arrows (<<< and >>>) on the left and right of the bar to advance to the next screen in that view
   - The **Today** button brings users to the current day’s schedule.
TO CREATE A NEW APPOINTMENT:

1. Click on the **Appointments** bar.
2. In any view, double click the target date in the calendar.
   - This opens the new **Appointment / Meeting** window.
   - Users can also right-click within the calendar and select **Add new > Appointment** from the pop-up menu.
3. Fill in the fields for the appointment
   - Note that users can change to a different date by typing in the Start Date and End Date fields, or by clicking on the icon and selecting a date.
   - Make sure the **Save in Outlook** box is checked if users want the event to appear in your Microsoft Outlook calendar.
4. Users can set a reminder by clicking on the **Set a Reminder** check box and selecting a reminder time from the pull-down menu.
5. Click **Save and Close** to save the appointment to your system.

**TASKS / REMINDERS**

The **Tasks / Reminders** bar in the Overview screen lists all tasks for the selected user.

**NOTE:** Tasks at this level are general tasks for a user, not related to a specific parcel, project or report. More specific tasks can be added to any of the foremention areas.
To view or add a task:

1. Click on the Tasks / Reminders bar.

   ➢ All of the user’s current tasks will show in the table.
   ➢ To view completed tasks, uncheck the *Hide Completed Tasks* box on the right.

2. Double-clicking on a task opens the *Task* window.

3. Right-click within the task table.

4. Select *Add New Task* from the Pop-up menu. This opens the *Task* window.

5. Fill in the required information
NOTE: Tasks must be assigned to a Municity User

6. Users can set reminders to appear to yourself or other users in the system by clicking the Person(s) to be kept updated button and selecting the user from the Contacts list.

7. Click Save and Close to record the new task.

NOTES / REPORTS

Reports are set up in the reports section of Municity. Reports that are saved as “Quick Reports” also appear in the Notes / Reports panel in then overview section.

VIEW NOTES AND REPORTS

Double click to open a note or report.

PRINTING NOTES AND REPORTS

To print a report:

1. Select the report in the list.
2. Double-click it to open,
3. Click on the Print button.
   - The report will print pulling the information from the database.
BUILDING DEPARTMENT SECTION

MODULE BUTTONS

SEARCH

Selecting either the **Search** button or the Magnifying Glass on the Active Item info at the top of the Content page opens the selected search window:

- Recent Parcels
- Quick Search
- Detail Search
- Find Missing Permit
- Company Search
- Contact Search
- Liability/Worker’s Comp Notices

Use the **Find Missing Permit** option to help identify a permit “orphaned” during the changeover to Municity from a legacy system. The **Find Missing Permit** button opens a detailed search window that lets users search on the Permit number or other parameters.
**Liability/Worker’s Comp Notices** generates a letter for all companies marked as a requiring a license where license data is expired or missing.

**VIEW**

- Building Dept Reference Pane
  - Opens the reference pane if it’s been closed.
- Reminders
  - This opens the Reminders window

**SEND A NOTE**

Clicking this button opens a window that allows users to send a note via e-mail.

![Note window]

To complete the note:

1. Type the email address of the recipient or click the button to select a recipient from the contacts list.
2. Fill in your email address.
3. Write the note.
4. Click the **Send Note** button

The note will be delivered to the recipients Municity Notes section or email server.
CODES

This is linked to code reference material on your computer or via the internet.

1. Click on the **Codes** button in the view menu.
   - A drop-down will allow users to select from the codes available in the system.

2. Users can copy and paste any text, as needed, from the code to a note, permit, or other document.

**NOTE:** the Codes interface is set in the **Program Options** of the **Admin Section**

PARCEL

The Parcel button allows users to modify the current parcel to:

- Create a New Parcel
- Create a New Sub-Parcel
- Change Parcel ID
- Change Parcel Ownership
- Split this Parcel
- Join Two Parcels

The **Test** button allows users to confirm that a new parcel number, whether from a change, subdivision, or new creation—is not already associated with another parcel.

PRINT

The **Print** button prints information or documents for the current parcel.
**PARCEL INFO**

Parcel info can print a general or detailed report on the parcel. What is included on each report is specific to how your version of Municity is set up.

**PRINT HISTORY**

Print History allows you to generate a parcel history based on which options you select from the History Printing screen.

![History Printing](image)

**NOTE:** This document is useful to print along with Abstract or Title Search letters.

**PARCEL DOCUMENTS**

Selecting to print a homeowner document will launch Microsoft Word, which will open a standard document with information pulled in from the parcel listing.

➤ Users can edit, save and print this as with any Word document.
The specific documents available are set up locally in individual Municity systems.

![Parcel Documents](image)

**PORTABLE**

This button lets users synchronize PDAs, laptop computers, or other devices with the inspection calendar:

1. Connect the device to the computer running Municity through a USB connection.
2. Open the calendar application on the device.
3. Click the **Portable** section button and select **Synchronize** from the drop-down menu.

**MAPS**

This button launches the Municity GIS Application. Users can choose to open:

- The current parcel
- The whole municipality

**TABLES**

The **Table** button lets users access and modify the contents of different Municity items. For these items:

- Applications
…users can edit the selections of the different pull-down menus. For example, the pull-down options for Application status can be:

- Open
- Pending
- Closed

The editing tables allow a title and a description for each pull-down item.

For these items:

- Zones
- Boards
- Contacts
- Companies

...the tables have additional fields. To edit them:

1. Click on the item in the Tables pull-down menu. This opens an editing window.
2. Right-click within the list to add, edit, or delete an item.
   - Some windows have a **Create New** button.
3. Make changes as desired, and then click.
REFERENCE-pane

RECENT PARCELS

The Recent Parcels pane lists recently accessed Parcels in a table. To sort the Recent Parcels pane, click the desired heading.

PARCEL SEARCH

There is a Parcel Search window at the bottom of the reference pane. (If the search window is collapse / minimized, click on the button.) It lets users search quickly by Parcel ID or Owner Name.

Enter the search item in the appropriate window and hit the >> or enter and that item will load.

NOTE: Municity searches according to how items are entered in the system. For example, if an owner’s name is listed as John Smith, a search on “Smith” won’t turn it up unless you use a fuzzy wildcard search.

FUZZY WILDCARD SEARCH

To initiate a fuzzy wildcard search: use the ‘%’ character at the beginning of an entry. A search on ‘% Field’ would turn any entry containing the letter pattern ‘f- i-e-l-d’ anywhere in the owner name field, such as “Smithfield”, “Wakefield” or “Jones Fieldstone Company”. There is no need to use the ‘%’ character at the end of the search.

NOTE: If more than one item fits the parameter in any search, the Locate window opens with the found items listed in the grid. You can sort the grid by selecting the column headings.

CONTENT PANE

The content pane is where users spend most of the time organizing, viewing, and editing information associated with each parcel. The tabs allow users to work on different items.
The number in parenthesis next to the tab name indicates the number of items in that tab.

For tabbed windows containing lists of items, users can open an existing item for editing by double-clicking on the table entry. Right-clicking in the table creates a pop-up that allows users to:

- Create a new entry
- Edit a selected entry
- Delete the selected entry

**GENERAL**

The General tab shows basic information and history related to the parcel. Additional information is accessible for viewing and editing through the Detail Tabs.

**APPLS. - PERMITS – CERTS**

This tab allows users to view and work with applications, permits, and Certificates related to the parcel.

**TO CREATE A NEW BUILDING APPLICATION:**

To create a new building application:

1. Make sure that the correct parcel shows as the active item.
2. Click the [Apps (1) Permits (4) Certs (2)] tab.

   - The numbers in parentheses on the tab show the number of Applications, Permits and Certificates in process or issued to that parcel.
This opens a window with Applications, Permits and Certificates panes.

3. Click on the **Create New Application** button.
   - This opens the Application for Permit window.

   **NOTE**: Users can also right-click in the Applications table and select Add New Application to this Parcel from the pop up menu.
4. Fill in the appropriate fields in the window.
   - **NOTE:** Users must pick a valid permit type from the drop-down menu before entering any other information.
4.
5. Users can add the tasks associated with the type of permit from the Tasks tab.
   - Select the permit template from the drop-down menu.
   - Click the **Add Template Items to Tasks** button.
6. The tabs along the tops of the windows allow users to add additional information about the application (see below for details).
7. When finished, click **Save and Close** to add the Application to the Municity database.
   - This will assign an application number based on system.
   - Users access the **Save and Close** button from any of the tabs.

**TO CREATE A PERMIT FROM AN EXISTING APPLICATION**

1. Click the application listing on the Applications Pane of subject parcel to Open the application window.
2. Change the status to "Approved" or click **Mark as Approved** from the top menu of the application window.
3. Users will be prompted to mark all inspections as complete.
4. If the inspection requirements are satisfied, Municity will prompt the user to confirm creating a permit.
5. Municity will generate a permit with the same number as the application.

**NOTE:** Users can reduce clutter by checking the **Don’t show applications w/ permits issued** box.

**TO CREATE A NEW PERMIT**

1. Make sure that the correct parcel shows as the active item.
2. Click the **Applications (1) Permits(4) Certs(2)** tab.
   - The numbers in parentheses on the tab show the number of Applications, Permits and Certificates in process or issued to that parcel.
   - This opens a window with Applications, Permits and Certificates panes.
3. Click on the **Create New Permit** button or Right Click in a blank section of the grid in the Permit Pane.
   - This opens the Permit window.
5. Fill in the appropriate fields in the window.
   - **NOTE:** Users must pick a valid permit type from the drop-down menu before entering any other information.

6. If set up at installation, all the required inspections and tasks will automatically fill in when the permit type is selected.
   - Users can add tasks or inspections manually by selecting an inspection or tasks template from the drop-down.

7. The tabs along the tops of the windows allow users to add additional information about the permit.

8. When finished, click to add the permit to the Municity database.
   - This will assign a permit number based on system.
   - Users can access the button from any of the tabs.
   - If you close without saving, you will be prompted on whether you would like to Save or discard changes.

**TO CREATE A CERTIFICATE FROM AN EXISTING PERMIT**

1. Click the appropriate permit listing in the Permits pane of the subject parcel to open the permit window.
2. Change the status of the permit to “Approved” or “Closed” then save and close the permit.
   - Users will be prompted to mark all inspections as complete.
3. If the inspection requirements are satisfied, Municity will prompt the user to confirm creating a Certificate.
4. Municity will generate a Certificate in a new window.
5. Update information as needed, then click **Save and Close**.

**NOTE:** Users can reduce clutter by checking the **Don’t show permits w/ Certificates issued** box.

---

**TO CREATE A NEW CERTIFICATE**

1. Make sure that the correct parcel shows as the active item.
2. Click the **App.:1 Permits(4) Certs(2)** tab.
   - The numbers in parentheses on the tab show the number of applications, permits and certificates in process or issued to that parcel.
   - This opens a window with applications, permits and certificates panes.
3. Click on the **Create New Certificate** button.
   - This opens the **Certificate** window.

![Certificate window](image)

4. **NOTE:** Users can also right-click in the certificates table and select **Add New Certificate to this Parcel** from the pop up menu.
5. Fill in the appropriate fields in the window.
   - **NOTE:** Users must pick a valid certificate type from the drop-down menu before entering any other information.
6. Users can add the tasks associated with the type of Certificate from the Tasks tab.
   - Select the certificate template from the drop-down menu.
   - Click the **Add Template Items to Tasks** button.
7. The tabs along the tops of the windows allow users to add additional information about the certificate (see below for details).
8. When finished, click to add the certificate to the Municity database.
9. This will assign a certificate number based on the local system.
10. Users access the button from any of the tabs.

TEMPORARY CERTIFICATES

1. Make sure that the correct parcel shows as the active item.
2. Click the tab.
   - The numbers in parentheses on the tab show the number of applications, permits and certificates in process or issued to that parcel.
   - This opens a window with applications, permits and certificates panes.
3. Click on the Create New Certificate button.
   - This opens the Certificate window.
4. Change the Certificate Type to Temporary CO or similar.
5. Change the Status to “Open”
You can now check Temporary/Conditional and set the expiration and follow-up inspection dates.

INTERVAL INSPECTIONS

The Interval Inspections tab allows users to set-up and track recurring inspections related to the parcel, not to a permit or application – those inspections will be set on the permit or application itself.

TO CREATE A NEW INSPECTION

1. Make sure that the correct parcel shows as the active item.
2. Click the Interval Inspections [0] tab.
   ➢ The numbers in parentheses show the number of Interval Inspections already associated with that parcel.
   ➢ NOTE: To associate an inspection with a specific application or permit, go to the Planning or Zoning section and work from the Inspections tab in that section.
3. Click on the Create New Inspection button at the bottom of the screen or right-click in the Inspections to Be Done table and select Add New Inspection from the pop-up menu.
   ➢ This opens the New Inspection window
   ➢ Completed inspections appear in the bottom pane, open inspections in the top.
4. Users must pick a valid Inspection type from the dropdown menu before entering any other information.
   ➢ If the Show Int. Fire/Safety Only checkbox is selected, only inspection types designated as Fire/Safety will show in the drop-down.
5. If you select an inspector and time for the inspection, that information will appear on the inspector’s appointments.
   ➢ Users can access municipal codes by clicking the button in the menu above the tabs.
6. Use the tabs along the tops of the windows to add additional information, fees, etc.
   ➢ NOTE: users can set up recurring inspections by clicking the Rec tab
7. Click to add the inspection to the record.

Right-clicking an existing inspection in the inspection table allows users to also edit, delete, change order or clear all inspections.

When an inspection is marked as complete in the Inspection window, it moves to the completed inspections pane.

TO SCHEDULE AN INSPECTION

To schedule an inspector:

1. Open the inspection by clicking on the entry.
2. Select an **Inspector** from the drop-down menu.

- You can click on the calendar icon next to the inspector to open his / her appointment calendar to see when the inspector is available.

3. Click **Set Time** and set the time, or select AM or PM to set a time block
   - AM and PM hours can be set in the Admin section, under **Building Department Section > Scheduling**.

4. Click **Save and Close**.

---

**COMPLAINTS**

Users can track complaints through this tab. To record a complaint:

1. Make sure that the correct parcel, project, or application shows as the active item.
2. Click the **Complaints** tab.
3. Click on the **Create a New Complaint** button at the bottom of the screen
   - Users can also right-click in the table and select **Add new Complaint** from the pop-up menu.
   - This opens the Complaint window.

4. Fill in the appropriate fields in the **Complaint** window.
5. Tabs allow additional information related to the complaint, including fines, court info, pictures and detailed contact information.
6. Click **Save and Close** to add the complaint to the database.

A complaint number is automatically generated with the complaint.

**VARIANCES**

Variances are recorded in this tab. To create a new variance:

1. In the **Variances** tab, click on the **Create a New Variance** button at the bottom of the screen.
   - Users can also right-click in the table and select **Add new variance** from the pop-up menu.

2. Fill in the appropriate fields in the **Variance Editor**.
NOTE: Users must pick a Variance type from the drop-down menu before entering any other information.

Users can access municipal codes by clicking the button in the menu above the tabs.

3. The tabs along the tops of the windows allow users to add additional information, fees, etc.

4. Click to add the variance to the record.

**EASEMENTS**

The Easements tab is where users view, add, or modify easements for a parcel.

To add a new easement:

1. Click the **Create a New Easement** button at the bottom of the window, or right-click in the table and select **Add New Easement to this Parcel** from the pop-up menu.
➢ This opens the Easements editor.

2. Add the information, including type, acreage and effective dates. The number will be generated automatically.

3. Tabs allow users to add notes, documents, or pictures to the easement listing.

4. Click **Save and Close** to add the easement to the database.

To work with an existing easements in the table, right-click on it and select **Edit Selected Easement** or **Remove Easement from this Parcel**.

**TIME TRACKING**

Time tracking enables users to record and trace time spent on a given parcel.
To add a new time event:

1. Click the **Create a New Time Entry** button at the bottom of the window or right-click in the table and select **Add New Time Event to this Parcel** from the pop-up menu.
   - This opens the **Time Tracking** window.

   ![](image)

   - **Person:** SUPERVISOR
   - **Description:** Time Spent
   - **Date:** 03/22/2007
   - **Start Time:** 9:00 AM
   - **End Time:** 5:00 PM
   - **Entered By:** SUPERVISOR

2. Add the information, including the person involved, date, and time of the event.
3. The tab allows users to add notes or invoices to the time event listing.
4. Click **Save and Close** to add the time event to the database.

The bottom of the Time Tracking tab shows the cumulative amount of time spent on the parcel.

To work with an existing Time Event in the table, right-click on it and select **Edit Selected time event or remove selected Time Event**.

**PICTURES**

Users can add pictures to the database for a parcel directly from a digital camera.

- **NOTE:** These general instructions should work with most digital cameras.
  1. Make sure the camera is attached to your PC and turned on.
  2. Open the Inspection window for the inspection and click on the **Pictures** tab.
3. Click the button at the bottom of the **Pictures** screen.
4. Browse for the camera in the **Open** window.
5. Photos in the camera should display in the window.
   - Use **Thumbnails** view to see the pictures.
6. Select the photos to attach.
   - Hold the CTRL key to select multiple pictures.
7. Click **Open**.
   - The selected pictures will be listed in the Pictures list.
8. Right-click in the list entries to edit the photo descriptions.

### PLANNING

The **Planning** tab lists any projects recorded in the Planning section of Municity. Double-clicking on the entry will open the project record in the Planning section.

Changes to the project cannot be made from the Building Department section.

### ZONING

The Zoning tab lists any applications recorded in the Zoning section of Municity. Double-clicking on the entry will open the application record in the Zoning section.

Changes to the project cannot be made from the Building Department section.

### TASKS

This tab lists any tasks associated with the parcel. There are three ways to add a new task to the task list:

- Select a task from the **Parcel tasks** pull-down menu and click the **Add selected Task** button
➢ Enter a task description in the **New Task** window and click the **Create Task** button
➢ Right-click in the table and select **Add a New** Task from the pop-up menu

When the Task window opens, add details as needed, including:

➢ Due dates
➢ People to be updated
➢ Reminders

![Task window](image)

Tabs along the top of the window let users add associated inspections, checklist items, meeting items, fees and other information to the task.

Right-clicking in the table produces a pop-up menu to:

➢ Add, edit or delete tasks
➢ Change the order of tasks
➢ Mark a task complete

### EVENTS

Events can include any type of activity or task that the municipality wants to include and track.
To add a new event:

1. Click the **Create a New Event** button at the bottom of the window or right-click in the table and select **Add new Event to this Parcel** from the pop-up menu. This opens the **Events** editor.
2. Add event information, including type, date, owner name, and if any follow-up is required, by when and by whom.
   - Tabs allow users to add court info, notes, documents, or pictures to the event listing.
   - The **Move** button lets users re-associate the event with a different parcel.
3. Click **Save and Close** to add the event to the database.

To work with existing events in the table, right-click on them and select **Edit Selected Event** or **Delete Event**.

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**FEES**

Logging fees from within the Building Department section has the benefit of associating the payment or fee with the specific parcel.

To add a new fee:

1. Click the **Fees** tab.
2. Click on the **Create New Fee** button at the bottom of the table.
   - Users can also right-click within the table and select **Add new fee** from the pop-up menu.
3. Complete the entry.
Some fee types will generate a pop-up to calculate the fee.

4. Click **Save and Close**.
   - The completed fee transaction will appear in the **Fees** tab of the active item as well as in the **Charges and Payments** window.
   - The total fees associated with the item will show at the bottom of the **Fees** window.

**NOTES DOCS**

The **Notes Docs** tab allows users to add documentation to parcel activities.

**TO ATTACH A NOTE**

1. Click the **Create Note** button to open the **Note** window.
2. Type the email address of the recipient or click the button to select a recipient from the contacts list.
3. Fill in your email address.
4. Write the note.
5. Click the **Send Note** button

The note will be delivered to the recipients Municity Notes section or email server.

The note will be delivered to the recipients Municity Notes section or their e-mail server, and a copy will remain in the parcel record.
TO ATTACH AN EXISTING ELECTRONIC DOCUMENT:

1. Click on the tab.
2. Click on the button at the bottom of the documents pane.
   - This opens the screen.
3. Browse within your server for the document(s) users want to attach.
4. Select the document and click the Open button.
   - Users can select more than one document by holding the CTRL key (for individual documents) or the SHIFT key (for a range).

NOTE: This creates a new copy of the document within the Municity database. It does not create a link to the original document.

TO SCAN AND ATTACH A HARD COPY DOCUMENT:

1. Load the document in your scanner.
2. Click the Scan Document button at the bottom of the tab. This opens the Scanner window
   - Users can click the Settings tab to set up the scanner, if needed.
3. From the Scan tab, click the Scan Document button. This activates the scanner.
   - Users can view the scanned document in the Scan tab window.
4. Click the Save / Add button to save an image of the document in the Municity database.
5. Click the Cancel button to discard the image.

TO ADD AN EMAIL

1. Click on the button at the bottom of the tab.
   - This opens the Select Folder screen.
2. Select the email folder containing the email that users want to attach.
3. Double-click the email that users want to attach.
4. After documents are attached, Users can click on the name of the document to launch it in a new window.
   - NOTE: Users must have the appropriate application on your system to launch a document.

SUB-PARCELS

From Municity, users can create additional sub-parcels from an existing parcel.
To generate a new sub-parcel:

1. Click the **Create a New Sub-Parcel** button at the bottom of the window or right-click in the table and select **Create a New Sub-Parcel** from the pop-up menu.
   - This opens the **New Parcel ID** window.
2. Add the information, including the new address and parcel number. There is a check box to record the division in the events for the parcel
   - The test button allows users to confirm that a new parcel number is not already associated with another parcel.
3. Detail tabs allow users to enter additional information about the new parcel.
4. Click **Save and Close** to add the sub-parcel to the database.

To work with existing sub-parcels in the table, right-click on them and select **Edit Selected Sub-Parcel** or **Delete Sub-Parcel**. **Edit Selected Sub-Parcel** loads the selected sub-parcel as the active item.

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**DETAIL TABS**

The detail tabs, which are only accessible under the General tab, provide areas to put additional information about the parcel.

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**OVERVIEW**

The overview tabs basic parcel information and history. Note that this information is not editable from the Overview detail tab view.

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**MAIN INFO**

The Main Info tab is where users can enter address and owner information, as well as physical details about the parcel lot.

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**HISTORICAL INFO**

Historical info includes information about the lot and its structures.

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**BUSINESS / CONTACTS**

The Business / Contacts tab is the place to put information about a business on the property, a property manager, and the emergency contact.

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**SETBACKS / INVENTORY**
Setbacks / Inventory records additional details keyed to assessments, such as square footage, value, number and types of rooms, etc.

**OWNER HISTORY**

Owner history tracks the ownership of the parcel.

Any changes to the Parcel Owner data on the Main Info tab or via the Parcel Update utility will automatically generate an owner history record.

**SEWER / SEPTIC / WELL**

The Sewer / Septic / Well tab records information about these systems.

**OCCUPANCY / FIRE / SAFETY**

This tab is the area to record occupants of the structure, whether residential or commercial.

The Occupants Section allows you to issue permits or complaints or track other data that pertains only to that business or resident and not to the whole parcel.
To edit this information:

1. Click the **Add New Occupant** button at the bottom of the window or right-click in the table and select **Add new Occupant / Tenant to this Parcel** from the pop-up menu. This opens the Occupants / Tenants window.

   ![Occupants / Tenants Window](image)

2. Add information about the occupant and property.
3. Detail tabs allow users to provide information about other contacts, such as business residents and emergency contacts.
4. Tabs along the top of the window allow users to add information about:
   - Applications/Permits/Certificates
   - Interval Inspections
   - Compliants
   - Fire / Safety inventory
   - Occupancy limits
   - Fees
5. Click **Save and Close** to add the Occupant / Tenant to the database.

To work with an existing occupant listing in the table, right-click on it and select **Edit Selected Occupant / Tenant** or **Delete Occupant / Tenant**.
**FIRE / SAFETY SECTION**

The Fire / Safety section is not a section to add new information. Instead, it consolidates fire and safety inspections and complaints from the Building Department, Planning, and Zoning sections in one place.

**MODULE BUTTONS**

**PRINT**

There is only one Module Button in the section. When an item in the table is selected, clicking the *Print* button will generate a document, such as a Notice of Intent to Inspect, with the appropriate information pulled from the database.

Depending on the document selected, users may receive a prompt to, for example, mark that the individuals named have been notified. Specific documents will depend on your local installation.

**CONTENT PANE**

The Content pane lists outstanding Fire / Safety Inspections and Fire / Safety Complaints. Users can search lists by type and inspector using the search pane at the bottom of the screen.

**NOTE:** Users must click the *Remove Search / Filter* button to restore the entire list before conduction additional searches on the entire list.

To group complaints on a given table column, drag the heading for that column to the field labeled *Drag a column header here to group by that column.*

Complaints will be reorganized according to that heading item. Users can drag additional column headings to that header space to reorganize.

Users can also rearrange the table by dragging the headings. They will replace themselves at the red arrows.
If a property fails a fire inspection, the user is prompted to create a complaint.

**NOTE:** To remove listings for completed inspections from the list, check the box for *Don’t Show Completed Inspections.*

Lists are color-coded according to status:

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**COLOR CODING**

The Fire Inspection lists are color-coded according to status:

- **Green** indicates that the owner has been notified and the inspection is scheduled, but the inspection is still open.
- **Yellow** indicates the owner has been notified of an upcoming inspection but it has not been scheduled.
- **Red** indicates the inspection is past due, no one has been notified, and the inspection has not been scheduled.
- If no action (notification or schedule) has been taken, but an inspection is not overdue, it remains white.

After inspection...

- Inspections that are complete and passed will have a green check.
- Inspections that fail have a red exclamation point

If a property fails a fire inspection, the user is prompted to create a complaint

To remove listings for completed inspections from the list, check the box for *Don’t Show Completed Inspections.*
PLANNING SECTION

MODULE BUTTONS

NEW

The *New* button opens the *New Project* pane in the reference panel.

Enter the name of the new project in the field and click the button or hit the **ENTER** Key to load the new project.

SEARCH

The Search button has three drop-down options:

- **Recent Projects**
  - Opens the Recent projects window
- **Quick Search**
  - Opens the Project Search window
- **Detailed Search**
  - Opens the Locate Project window

VIEW

The View button has two drop-down options:

- **Planning Reference Panel**
  - Opens the reference pane if it’s been closed
- **Reminders**
  - This opens the *Reminders* window

SEND A NOTE

Clicking this button opens a window that allows users to send a note via e-mail.
To complete the note:

1. Type the email address of the recipient or click the button to select a recipient from the contacts list.
2. Fill in your email address.
3. Write the note.
4. Click the **Send Note** button

The note will be delivered to the recipients Municity Notes section or email server.

**CODES**

1. Click on the **Codes** button in the view menu.
   - A drop-down will allow users to select from the codes available in the system.
   - ![Codes Interface]

2. Users can copy and paste any text, as needed, from the code to a note, permit, or other document.

**NOTE:** the Codes interface is set in the of **Program Options** of the **Admin Section**
PRINT

The **Print** button lets users print:

- Project Summary Report
- Project Escrow Payments

TABLES

The Table button lets users access and modify the contents of different Municity items:

- Project Status
- Project Types / Templates
- Complaints
- Conditions
- Easements
- Financial
- Inspections
- Permits
- Tasks
- Variances
- Boards
- Zones
- Contacts
- Companies

Users can edit the selections of the different pull-down menus. For example, the pull-down options for Application status can be:

- Open
- Pending
- Closed

To edit tables:

1. Click on the item in the **Tables** pull-down menu. This opens an editing window.
2. Right-click within the list to add, edit, or delete an item.
   - Some windows have a **Create New** button.
3. Make changes as desired, then click **Save and Close**.
MAPS

This button launches the Municity GIS Application. Users can choose to open it by:

- Map Project Parcels
- Display Map of Whole Municipality

REFERENCE PANES

NEW PROJECT

The **New Project** pane in the reference panel initiates a new project. Enter the name of the new project in the field and click the button or hit the **ENTER** key to load the new project.

RECENT PROJECTS

The **Recent Projects** pane lists recently accessed projects in a table. To sort the **Recent Projects** pane, click the desired heading.

PROJECT SEARCH

There is a Project search windows at the bottom of the reference pane. (If the search window is collapse/minimized, click on the button.) It lets users search quickly by **Project Name** or **Application Number**.

Enter the search item in the appropriate window and hit the >> or enter and that item will load.

**NOTE:** Municity searches according to how items are entered in the system. For example, if an owner's name is listed as John Smith, a search on “Smith” won’t turn it up.

If more than one item fits the parameter, the Detailed Search window opens with the found items listed.

CONTENT PANE

TABS

**GENERAL**

The general tab contains three panes:
- Project Overview
  Basic information on the project, owner, status, and time spent. Clicking on certain items in the Project Overview will open the associated Detail tab.

- Contains
  A summary of the items under the different tabs. Clicking on one of those entries will open the associated tab.

- Tasks
  A Gantt chart representing the tasks involved with the project

When users create a new planning project, Municity creates a Gantt chart timeline at the bottom of the General tab, Overview window to show associated tasks and when they are schedule to occur.

To change items in the Gantt chart, users can double click the item in the chart or open it in the task list.

Users can also click on and drag the timeline blocks in the Gantt chart to reschedule, lengthen, or shorten them.

- The numbers that appear in the blocks are the dates in the month.

PARCELS

The Parcels tab lists the parcels involved at the beginning and end of the project.

- Clicking the Add Parcel button opens a search window to locate the parcel.
- Opening an existing parcel by clicking it (or right-clicking and selecting Edit selected parcel from the pop-up menu) opens the parcel in the Building Section where it can be edited if you have rights to edit in the Building Section.

NOTE: If you have read-only access to the Building Section you will either need to have your permissions revised, or have someone in the Building Department make the change for you.

TASKS
This tab lists any tasks associated with the project. There are three ways to add a new task to the task list:

- Select a task from the **Project tasks** pull-down menu and click the **Add selected Task** button
- Enter a task description in the **New Task** window and click the **Create Task** button
- Right-click in the table and select **Add a New** Task from the popup menu

When the Task window opens, add details as needed, including:

- Due dates
- People to be updated
- Reminders

Tabs along the top of the window lets users add associated inspections, checklist items, meeting items, fees and other information to the task.

Right-clicking in the table produces a pop-up menu to:

- Add, edit or delete tasks
- Change the order of tasks
- Mark a task complete

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**NOTES - DOCS**

The **Notes Docs** tab allows users to add documentation to project activities.

To attach a Note:

1. Click the **Create Note** button to open the **Note** window.
2. Type the email address of the recipient or click the button to select a recipient from the contacts list.
3. Fill in your email address.
4. Write the note.
5. Click the **Send Note** button

The note will be delivered to the recipients Municity Notes section or email server.

The note will be delivered to the recipients Municity Notes section or their e-mail server, and a copy will remain in the parcel record.

To attach an existing electronic document:

1. Click on the tab.
2. Click on the **Add Document(s)** button at the bottom of the documents pane.
   - This opens the **Open** screen.
3. Browse within your server for the document(s) users want to attach.
4. Select the document and click the **Open** button.
   - Users can select more than one document by holding the CTRL key (for individual documents) or the SHIFT key (for a range).

**NOTE:** This creates a new copy of the document within the Municity database. It does not create a link to the original document.

To scan and attach a hard copy document:

1. Load the document in your scanner.
2. Click the Scan Document button at the bottom of the tab. This opens the Scanner window
   - Users can click the **Settings** tab to set up the scanner, if needed.
3. From the **Scan** tab, click the **Scan Document** button. This activates the scanner.
   - Users can view the scanned document in the **Scan** tab window.
4. Click the **Save / Add** button to save an image of the document in the Municity database.
5. Click the **Cancel** button to discard the image.

**TO ADD AN EMAIL**

1. Click on the **Add Email** button at the bottom of the tab.
2. This opens the Select Folder screen.
3. Select the email folder containing the email that users want to attach.
4. Double-click the email that users want to attach.
5. After documents are attached, Users can click on the name of the document to launch it in a new window.
   - **NOTE:** Users must have the appropriate application on your system to launch a document.

**PERMITS**

The **Permits** tab allows users to create and track building permits related to the project. A lower pane of the Permits window shows existing building permits related to the parcel.
To create a new permit:

1. Click on the **CREATE NEW PERMIT** button.
   - This opens the Permit window.
   - **NOTE:** Users can also right-click in the Permits table and select Add New Permit to this Parcel from the pop up menu.
2. Fill in the appropriate fields in the window.
   - **NOTE:** Users must pick a valid permit type from the drop-down menu before entering any other information.
3. Users can add the tasks associated with the type of permit from the Tasks tab.
   - Select the permit template from the drop-down menu.
   - Click the button.
4. The tabs along the tops of the windows allow users to add additional information about the permit (see below for details).
5. When users are finished, click to add the Permit to the Municity database.
   - This will assign a permit number based on system.
   - Users access the button from any of the tabs.

### INSPECTIONS

The Inspections tab allows users to set-up and track inspections related to the project.

To create a New Inspection

1. Click the **Inspections** tab.
   - The numbers in parentheses show the number of Interval Inspections already associated with that project.
2. Click on the button at the bottom of the screen
   - Users can also right-click in the table and select Add new Inspection from the pop-up menu.
3. Fill in the appropriate fields in the Inspection window.
   - **NOTE:** Users must pick a valid Inspection type from the dropdown menu before entering any other information.
   - If users select an inspector and time for the inspection, that information will appear on the inspector’s appointments.
   - Users can access municipal codes by clicking the button in the menu above the tabs.
4. Use the tabs along the tops of the windows to add additional information, fees, etc.
   - Note that users can set up recurring inspections by clicking the Recurrence tab
   - Click to add the inspection to the record.

To schedule an inspector:

1. Open the inspection by double-clicking on the entry.
2. Select the inspector from the drop-down menu.
3. Click on the calendar icon next to the inspector to open his / her appointment calendar.
   - This enables the user to see when the inspector is available.
4. Fill in the date and time for the inspection in the Inspection window.
5. Click **Save and Close.**
**COMPLAINTS**

Users can track complaints through this tab.

To record a complaint:

1. Click on the *Create a New Complaint* button at the bottom of the screen
   - Users can also right-click in the table and select *Add new Complaint* from the pop-up menu.
2. Fill in the appropriate fields in the Complaint window.
3. Tabs allow additional information related to the complaint, including fines, court info, pictures and detailed contact information.
4. Click *Save and Close* to add the complaint to the database.

A complaint number is automatically generated with the complaint.

**PICTURES**

Users can add pictures to the database for a project directly from a digital camera.

- **NOTE:** These general instructions should work with *most* digital cameras.
  1. Make sure the camera is attached to your PC and turned on.
  2. Click on the *Pictures* tab at the top of the complaint window.
  3. Click the button at the bottom of the PICTURES screen.
  4. Browse for the camera in the *Open* window.
  5. Photos in the camera should display in the window.
     - Make sure users are in * Thumbnails* view to see the pictures
  6. Select the photos that users want to attach.
     - Hold the *CTRL* key to select multiple pictures.
  7. Click *Open*.
     - The selected pictures will be listed in the Pictures list.
  8. Users can right-click in the list to edit the photo descriptions.

**VARIANCES**

Variances are recorded in this tab
To create a new variance:

1. In the **Variance** tab, click on the button at the bottom of the screen.
   - Users can also right-click in the table and select *Add new variance* from the pop-up menu.
2. Fill in the appropriate fields in the **Variance** window.
3. **NOTE:** Users must pick a Variance type from the drop-down menu before entering any other information.
4. Users can access municipal codes by clicking the button in the menu above the tabs.
5. The tabs along the tops of the windows allow users to add additional information, fees, etc.
6. Click to add the variance to the record.

**EASEMENTS**

The Easements tab is where users view, add, or modify easements for a parcel.

To add a new easement:

1. Click the **Create a New Easement** button at the bottom of the window, or right-click in the table and select *Add new Easement to this Parcel* from the pop-up menu.
This opens the Easements editor.

2. Add the information, including type, acreage and effective dates. The number will be generated automatically.
3. Tabs allow users to add notes, documents, or pictures to the easement listing.
4. Click **Save and Close** to add the easement to the database.

To work with existing easements in the table, right-click on it and select **Edit Selected Easement** or **Remove Easement from this Parcel**.

FINANCIAL

Logging fees from within the Planning section has the benefit of associating a fee, bond, or escrow with the specific project.

To add a fee:
1. Click the **Financial** tab.
2. Make sure the **Fees** detail tab is selected.
3. Click on the **Create New Fee** button at the bottom of the table.
   - Users can also right-click within the table and select **Add New Fee** from the pop-up menu.

![Fee Creation Interface](image)

4. Complete the entry.
   - Some fee types will generate a pop-up to calculate the fee.
5. Click **Save and Close**.
   - The completed fee transaction will appear in the **Fees** tab of the active item as well as in the **Charges and Payments** window.
   - The total fees associated with the item will show at the bottom of the **Financial** window.

Buttons at the top of the window allow users to print invoices or receipts for the selected fee.

To add a bond:

1. Click the **Financial** tab.
2. Make sure the **Bonds** detail tab is selected.
3. Click on the **Create New Bond** button at the bottom of the table.
   - Users can also right-click within the table and select **Add New Bond** from the pop-up menu.
4. Complete the entry.
5. Click Save and Close.
   - The completed bond transaction will appear in the Bonds tab of the active item as well as in the Charges and Payments window.
   - The total bonds associated with the item will show at the bottom of the Financial window.

To add an escrow account:

1. Click the Financial tab.
2. Make sure the Escrow accounts detail tab is selected.
3. Click on the Create New Escrow Account button at the bottom of the table.
   - Users can also right-click within the table and select Add New Escrow Account from the pop-up menu.
4. Complete the entry.
Some escrow account types will generate a pop-up to calculate the escrow account.

5. Click **Save and Close**.

- The completed escrow account transaction will appear in the **Escrow accounts** tab of the active item as well as in the **Charges and Payments** window.
- The total escrow accounts associated with the item will show at the bottom of the **Financial** window.

### DETAIL TABS

The Detail tabs, which are only accessible under the General tab, provide areas to put additional information about the project.

### OVERVIEW

The overview tab shows basic project information and history. Note that this information is not editable from the Overview detail tab view.

### MAIN INFO

The Main Info tab contains the basic project description shown on the Overview. It is editable here.

1. Click the Parcel Search icon to search and select the Master Parcel to add to the project.
2. Select a project type from the drop-down menu.
   - If a task template has been set, tasks will automatically be added to the project based on project type
   - To edit the type drop-down, click the **Type** label in blue to the left of the drop-down list.
3. Add an application number or one will be add automatically if project numbering has been set.
4. Set the project status as appropriate.

**TIME TRACKING**

Time tracking enables users to record and trace time spent on a given project.

To add a new time event:

1. Click the **Create a New Time Entry** button at the bottom of the window or right-click in the table and select **Add new Time Event to this Project** from the pop-up menu.
   - This opens the **Time Tracking** editor.

2. Add the information, including the person involved, date, and time of the event.

3. The tab allows users to add notes or invoices to the time event listing.

4. Click **Save and Close** to add the time event to the database.

The bottom of the window shows the cumulative amount of time spent on the project.

To work with an existing Time Event in the table, right-click on it and select **Edit Selected time event** or **remove selected Time Event**.

**DETAILS**

Details is the place where users can document the property involved in terms of:

- Land and property
- Environment
Existing and proposed structures

CONDITIONS

Conditions can include any type of activity or task that the municipality wants to include and track.

To add a new Condition:

1. Click the Create a New Condition button at the bottom of the window or right-click in the table and select Add new Condition to this Parcel from the pop-up menu. This opens the Condition editor.

2. Add the information, including a description, type, date effective, and if any follow-up is required, by when and by whom.
3. Tabs allow users to add contacts, notes, documents, or fees to the Condition listing, as well as make it recurring.
4. A button at the top of the condition editor window lets users mark it as completed.
5. Click Save and Close to add the Condition to the database.

To work with an existing Condition, right-click on it and select Edit Selected Condition or Delete Condition.

DATES

The Dates tab documents critical dates in the progress of the project, including:

- Application date
- Ready Date
- Anticipated construction start and end

PROJECT LOCATION

The location notes the street address, dimensions and municipal districts for the project.

APPLICANT INFO

Applicant info has full contact information from the applicant. This can be entered or pulled in from the Contacts list.

CONTACTS

Contacts allows users to enter the people involved with the project and organize them as:

- Owner
- Applicant
- Builder or other tradesman
- Agency, etc.

Contacts can be entered in or pulled in from the contact list.

LEAD AGENCY

The lead agency is listed here to make it easy to find the primary contact for the project.
ZONING SECTION

MODULE BUTTONS

NEW

The New button opens the New Application pane in the reference panel.

Enter the name of the new application in the field and click the button or hit the ENTER key to load the new application.

SEARCH

The Search button has three drop-down options:

- Recent Applications
  Opens the Recent applications window
- Quick Search
  Opens the Application Search window
- Detailed Search
  Opens the Locate Application window

VIEW

The View button has two drop-down options:

- Zoning Reference Panel
  Opens the reference pane if it’s been closed
- Reminders
  This opens the Reminders window

SEND A NOTE

Clicking this button opens a window that allows users to send a note via e-mail.

To complete the note:

1. Type the email address of the recipient or click the button to select a recipient from the contacts list.
2. Fill in your email address.
3. Write the note.
4. Click the Send Note button

The note will be delivered to the recipients via Municity Notes section (for system users) or email server.
CODES

3. Click on the Codes button in the view menu.
   - A drop-down will allow users to select from the codes available in the system.

4. Users can copy and paste any text, as needed, from the code to a note, permit, or other document.

NOTE: the Codes interface is set in the Program Options of the Admin Section

PRINT

The Print button lets users print an application summary

Any Other section print outs you have created

Project Documents lets you create Word documents with integrated project data.

TABLES

The Table button lets users access and modify the contents of different Municity items:

- Application Status
- Application Types / Templates
- Complaints
- Conditions
- Easements
- Financial
- Inspections
- Permits
- Tasks
- Variances
- Boards
- Zones
- Contacts
- Companies

Users can edit the selections of the different pull-down menus. For example, the pull-down options for Application status can be:

- Open
- Pending
- Closed
To edit tables:

1. Click on the item in the Tables pull-down menu. This opens an editing window.
2. Right-click within the list to add, edit, or delete an item.

3. Make changes as desired, then click *Save and Close*.

**MAPS**

This button launches the Municity GIS Application. Users can choose to open it by:

- Map Application Parcels
- Display Map of Whole Municipality

**REFERENCE PANE**

**NEW APPLICATION**

The *New Application* pane in the reference panel initiates a new application. Enter the name of the new application in the field and click the button or hit the **ENTER** key to load the new application.

**RECENT APPLICATIONS**

The *Recent Applications* pane lists recently accessed applications in a table. To sort the *Recent Applications* pane, click the desired heading.
APPLICATION SEARCH

There is an Application search windows at the bottom of the reference pane. (If the search window is collapse / minimized, click on the button.) It lets users search quickly by Applicant Name or Application Number.

Enter the search item in the appropriate window and hit the >> or enter and that item will load.

NOTE: Municity searches according to how items are entered in the system. For example, if an owner’s name is listed as John Smith, a search on “Smith” won’t turn it up.

If more than one item fits the parameter, the Detailed Search window opens with the found items listed.

CONTENT PANE

TABS

GENERAL

The general tab contains three panes:

- Application Overview
  Basic information on the application, owner, status, and time spent. Clicking on certain items in the Application Overview will open the associated Detail tab.

- Contains
  A summary of the items under the different tabs. Clicking on one of those entries will open the associated tab.
Tasks

A Gantt chart representing the tasks involved with the application. When users create a new zoning application, Municity creates a Gantt chart timeline at the bottom of the General tab, Overview window to show associated tasks and when they are schedule to occur.

To change items in the Gantt chart, users can double click the item in the chart or open it in the task list.

Users can also click on and drag the timeline blocks in the Gantt chart to reschedule, lengthen, or shorten them.

The numbers that appear in the blocks are the dates in the month.

Parcels

The Parcels tab lists the parcels affected by the application.

Add a parcel to the project by

- Clicking the **Add Parcel** button or
- Right click in the Parcel window and select “Add New Starting Parcel to this Project”.
Double-clicking a parcel (or right-clicking and selecting \textit{Edit selected parcel} from the pop-up menu) opens the Parcel information in the Building Section of the program. You can edit any parcel data that you have user rights to.

\textbf{NOTE:} if you have read only access to the Building section, you will not be able to edit parcel data. You may request that your program administrator revise your program rights or you can request the data be updated by a Building Department user.

\section*{TASKS}

This tab lists any tasks associated with the application. There are three ways to add a new task to the task list:

- Select a task from the \textit{Application tasks} pull-down menu and click the \textit{Add selected Task} button
- Enter a task description in the \textit{New Task} window and click the \textit{Create Task} button
- Right-click in the table and select \textit{Add a New Task} from the pop-up menu

When the Task window opens, add details as needed, including:

- Due dates
- People to be updated
- Reminders
Tabs along the top of the window let users add associated inspections, checklist items, meeting items, fees and other information to the task.

Right-clicking in the table produces a pop-up menu to:

- Add, edit or delete tasks
- Change the order of tasks
- Mark a task complete

**NOTES - DOCS**

The Notes Docs tab allows users to add documentation to the application.

To attach a Note:

1. Click the Create Note button at the bottom of the Notes Pane.
   - A Note form will open
2. Type the email address of the recipient or click the XXX button to select him or her from the contacts list.
3. Fill in your email [can this fill in automatically?]?
4. Write the note.
5. Click Send

The note will be delivered to the recipients Municity Notes section or their e-mail server, and a copy will remain in the project record.

To attach an existing electronic document:

1. Click on the Notes/Docs tab.
2. Click on the **Add Document(s)** button at the bottom of the documents pane.
   - This opens the **Open** screen.
3. Browse within your server for the document(s) users want to attach.
4. Select the document and click the **Open** button.
5. Users can select more than one document by holding the **CTRL** key (for individual documents) or the **SHIFT** key (for a range).
   - **NOTE:** This creates a new copy of the document within the Municity database. It does not create a link to the original document.

To scan and attach a hard copy document:

1. Load the document in your scanner.
2. Click the **Scan Document** button at the bottom of the **Notes/Docs** tab. This opens the Scanner window
   - Users can click the **Settings** tab to set up the scanner, if needed.
3. From the **Scan** tab, click the **Scan Document** button. This activates the scanner.
   - Users can view the scanned document in the **Scan** tab window.
4. Click the **Save/Add** button to save an image of the document in the Municity database.
5. Click the **Cancel** button to discard the image.

To add an email

1. Click on the **Add Email** button at the bottom of the **Notes/Docs** tab.
2. This opens the Select Folder screen.
3. Select the email folder containing the email that users want to attach.
4. Double-click the email that users want to attach.
5. After documents are attached, Users can click on the name of the document to launch it in a new window.
   - **NOTE:** Users must have the appropriate application on your system to launch a document.

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**PERMITS**

The Permits tab allows users to create and track building permits related to the application. A lower pane of the **Permits** window shows existing building permits related to the parcel.
To create a new permit:

1. Click on the **Create New Permit** button.
   - This opens the **Permit** window.
   - **NOTE:** Users can also right-click in the Permits table and select **Add New Permit** from the pop up menu.
2. Fill in the appropriate fields in the window.
   - **NOTE:** Users must pick a valid permit type from the drop-down menu before entering any other information.
3. Users can add the tasks associated with the type of permit from the **Tasks** tab.
   - Select the permit template from the drop-down menu.
   - Click the button.
4. The tabs along the tops of the windows allow users to add additional information about the permit (see below for details).
5. When users are finished, click to add the Permit to the Municity database.
   - This will assign a permit number based on system.
   - Users access the button from any of the tabs.

**INSPECTIONS**

The Inspections tab allows users to set-up and track inspections related to the application.
To create a New Inspection

1. Click the **Inspections** tab.
   - The numbers in parentheses show the number of Interval Inspections already associated with that application.
2. Click on the button at the bottom of the screen
   - Users can also right-click in the table and select Add new Inspection from the pop-up menu.
3. Fill in the appropriate fields in the Inspection window.
   - **NOTE:** Users must pick a valid Inspection type from the dropdown menu before entering any other information.
   - If users select an inspector and time for the inspection, that information will appear on the inspector’s appointments.
   - Users can access municipal codes by clicking the button in the menu above the tabs.
4. Use the tabs along the tops of the windows to add additional information, fees, etc.
   - Note that users can set up recurring inspections by clicking the Recurrence tab
5. Click to add the inspection to the record.

To schedule an inspector:

1. Open the inspection by double-clicking on the entry.
2. Select the inspector from the drop-down menu.
3. Click on the calendar icon next to the inspector to open his / her appointment calendar.
   - This enables the user to see when the inspector is available.
4. Fill in the date and time for the inspection in the **Inspection** window.
5. Click **Save and Close**.

**COMPLAINTS**

Users can track complaints through this tab. To record a complaint:
1. Click on the **Create a New Complaint** button at the bottom of the screen
   - Users can also right-click in the table and select **Add new Complaint** from the pop-up menu.
2. Fill in the appropriate fields in the **Complaint** window.
3. Tabs allow additional information related to the complaint, including fines, court info, pictures and detailed contact information.
4. Click **Save and Close** to add the complaint to the database.

A complaint number is automatically generated with the complaint.

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**VARIANCES**

Variances are recorded in this tab. To create a new variance:

1. In the **Variances** tab, click on the button at the **Create New Variance** bottom of the screen
   - Users can also right-click in the table and select **Add new variance** from the pop-up menu.
2. Fill in the appropriate fields in the **Variance** window.
3. **NOTE:** Users must pick a Variance type from the drop-down menu before entering any other information.
4. Users can access municipal codes by clicking the button in the menu above the tabs
5. The tabs along the tops of the windows allow users to add additional information, fees, etc.
6. Click **Save and Close** to add the variance to the record.
EASEMENTS

The Easements tab is where users view, add, or modify easements for a parcel. To add a new easement:

1. Click the **Create a New Easement** button at the bottom of the window, or right-click in the table and select **Add new Easement** from the pop-up menu. This opens the Easements editor.
2. Add the information, including type, acreage and effective dates. The number will be generated automatically.
3. Tabs allow users to add notes, documents, or pictures to the easement listing.
4. Click **Save and Close** to add the easement to the database.

To work with existing easements in the table, right-click on it and select **Edit selected easement** or **Remove Easement**.

FINANCIAL

Logging fees from within the Zoning section has the benefit of associating a fee, bond, or escrow with the specific application.
To add a fee:

1. Click the **Financial** tab.
2. Make sure the **Fees** detail tab is selected.
3. Click on the **Create New Fee** button at the bottom of the table.
   - Users can also right-click within the table and select **Add New Fee** from the pop-up menu.
4. Complete the entry.
   - Some fee types will generate a pop-up to calculate the fee.
5. Click **Save and Close**.
   - The completed fee transaction will appear in the **Fees** tab of the active item as well as in the **Charges and Payments** window.
   - The total fees associated with the item will show at the bottom of the **Financial** window.

Buttons at the top of the window allow users to print invoices or receipts for the selected fee.

To add a bond:

1. Click the **Financial** tab.
2. Make sure the **Bonds** detail tab is selected.
3. Click on the **Create New Bond** button at the bottom of the table.
   - Users can also right-click within the table and select **Add New Bond** from the pop-up menu.
4. Complete the entry.
5. Click **Save and Close**.
   - The completed bond transaction will appear in the **Bonds** tab of the active item as well as in the **Charges and Payments** window.
   - The total bonds associated with the item will show at the bottom of the **Financial** window.

To add an escrow account:

1. Click the **Financial** tab.
2. Make sure the **Escrow accounts** detail tab is selected.
3. Click on the **Create New Escrow account** button at the bottom of the table.
   - Users can also right-click within the table and select **Add New Escrow account** from the pop-up menu.
4. Complete the entry.
   - Some escrow account types will generate a pop-up to calculate the escrow account.
5. Click **Save and Close**.
   - The completed escrow account transaction will appear in the **Escrow accounts** tab of the active item as well as in the **Charges and Payments** window.
   - The total escrow accounts associated with the item will show at the bottom of the **Financial** window.

**PICTURES**

Users can add pictures to the database for an application directly from a digital camera.

- **NOTE:** These general instructions should work with *most* digital cameras.
1. Make sure the camera is attached to your PC and turned on.
2. Click on the **Pictures** tab at the top of the complaint window.
3. Click the button at the bottom of the **Pictures** screen.
4. Browse for the camera in the **Open** window.
5. Photos in the camera should display in the window.
   - Make sure users are in **Thumbnails** view to see the pictures
6. Select the photos that users want to attach.
   - Hold the **CTRL** key to select multiple pictures.
7. Click **Open**.
The selected pictures will be listed in the Pictures list.
8. Users can right-click in the list to edit the photo descriptions.

DETAIL TABS

OVERVIEW

The overview tab shows basic application information and history. Note that this information is not editable from the Overview detail tab view.

MAIN

The Main tab contains the basic application description shown on the Overview. It is editable here.

TIME TRACKING

Time tracking enables users to record and trace time spent on a given application.

To add a new time event:

1. Click the Create a New Time Entry button at the bottom of the window or right-click in the table and select Add new Time Event to this Application from the pop-up menu.
   ➢ This opens the Time Event editor.
2. Add the information, including the person involved, date, and time of the event.
3. The tab allows users to add notes or invoices to the time event listing.
4. Click Save and Close to add the time event to the database.

The bottom of the window shows the cumulative amount of time spent on the application.

To work with an existing Time Event in the table, right-click on it and select Edit Selected Time Event or Remove selected Time Event.

DETAILS

The Details screen is the place where users can document the property involved in terms of:

➢ Land and property
➢ Environment
➢ Existing and proposed structures
VARIANCE DETAILS

Variance Details enables users to record variance details. To add details to a variance:

1. Click the Create a New Variance Detail button at the bottom of the window or right-click in the table and select Add new Variance Detail from the pop-up menu. This opens the Variance Detail editor.
2. Add the information, including the rules involved, dates, and any notes.
3. A button at the top of the window allows users to Mark as approved.
4. Click Save and Close to add the time event to the database.

The bottom of the window shows the cumulative amount of time spent on the application.

To work with an existing variance in the table, right-click on it and select Edit Selected Variance Detail or Remove selected Variance Detail.

CONDITIONS

Conditions can include any type of activity or task that the municipality wants to include and track. To add a new condition:

1. Click the Create a New Condition button at the bottom of the window or right-click in the table and select Add New Condition to this Parcel from the pop-up menu. This opens the Condition editor.
2. Add the information, including a description, type, date effective, and if any follow-up is required, by when and by whom.
3. Tabs allow users to add contacts, notes, documents, or fees to the Condition listing, as well as make it recurring.
4. A button at the top of the condition editor window lets users mark it as completed.
5. Click **Save and Close** to add the Condition to the database.

To work with an existing Condition, right-click on it and select **Edit Selected Condition** or **Delete Condition**.

**DATES**

The **Dates** tab documents critical dates in the progress of the project, including:

- Application date
- Ready Date
- Anticipated construction start and end

**LOCATION**

The location notes the street address, dimensions and municipal districts for the application. This section is useful for unpopulated areas or parcels where the street address is insufficient.

**APPLICANT INFO**

Applicant info has full contact information for the applicant. This can be entered or pulled in from the Contacts list. The default data is pulled from the parcel owner information.
**CONTACTS**

Contacts allows users to enter the people involved with the application and organize them as:

- Owner
- Applicant
- Builder or other tradesman
- Agency, etc.

Contacts can be entered in or pulled in from the contact list.

1. To add a contact to a project Right Click in the blank area of the Application Contacts window.
2. You can then either Search for a Contact to Add or create a new Contact.

**LEAD AGENCY**

The lead agency is listed here to make it easy to find the primary contact for the project.
MEETINGS SECTION

The Meetings Section of Municity organizes all meetings and other related events in a single window.

MODULE BUTTONS

NEW MEETING

The button opens the Meeting window to set up a new meeting. This can also be done by clicking the Create New Meeting button at the bottom of the Pending / Open meetings pane.

VIEW

The View button has a drop-down to toggle Reminders on and off.

TABLES

The Tables button provides access to three editors:

- Agenda Categories
- Boards
- Meeting Task Templates

These tables allow users to change or create new items as covered by these editors.

CONTENT PANES

The Content pane shows planned and completed meetings under:

- Pending / Open Meetings
- Completed / Closed Meetings
To add a new meeting, click the **Create New Meeting** button at the bottom of the window or right-click in the table and select Add New Meeting from the pop-up menu. This opens the Meetings editor.

Click **Save and Close** to add the meeting to the database.

To work with existing meetings in the table, right-click on them and select **Edit Selected Meeting** or **Delete Meeting**.

### SETTING UP A MEETING

1. In the Meetings screen, open a new Meeting screen by:
   - Clicking the **New Meeting** button on the **View** menu
   - Clicking the **Create New Meeting** button at the bottom of the **Pending / Open Meeting** pane
   - Right-clicking in the table and selecting Add New Meeting from the pop-up menu.
2. Fill out the meeting details.
   - Users must use one of the drop-down selections for **Meeting Type**.
   - Users can enter dates and times manually or use the Calendar or Clock buttons to select dates and times.
3. Invite board members by selecting the board from the drop-down menu and clicking the button.
   - **NOTE:** Users can only add one board to the list in this way; if users click the **Add Board Members to Attendees** button a second time with another board selected, the first e-mail address will be deleted from the distribution list.
4. Invite additional attendees by clicking the Contacts button and double-clicking the names of people users want to invite.
   - Users can choose to include a reminder with the invitation.
   - **HINT:** Municity can be set up to publish meeting notices to your municipality’s website. Contact your IT or Technical Support rep to set up this function.
5. Use the tabs along the top for additional tasks related to the meeting:
   - Set the agenda
   - Make the meeting recurring
   - Add tasks associated to the meeting
   - Track fees or costs for the meeting
   - Attach notes or documents
6. When users are finished, click the **Save and Close** button.
7. Users can edit any meeting by right-clicking on it in the table and selecting Edit Selected Meeting.

**NOTE:** To move a meeting from the Pending / Open Meetings pane to the Closed / Completed pane, open the meeting window for that meeting and check the **Minutes Ratified / Meeting Closed** box.

**PRINT AN ANNOUNCEMENT, AGENDA, OR MINUTES**

1. Click the **Print** button in the **Meeting** window and select what you want to print:
   - Agenda
   - Public Notice
   - Minutes
2. **NOTE:** The **Print** button is in the window for the specific meeting, not the Meeting Section window.
3. You will get an alert that Municity is launching Microsoft Word.
   - The announcement, agenda, or minutes will appear as a new document in Word, using the assigned template.
4. You can save, edit and print as with any other document in Word.

**NOTE:** To print these items, a format document must be associated with the Meeting Type.

**CREATING A NEW MEETING TYPE**

**NOTE:** A User must have administrator access to the Meetings section to create a meeting type.

1. Open the meeting window for a new or existing meeting.
2. Click on the phrase **Meeting Type**.
3. Right-click in the table and select **Add Meeting Type** from the dropdown menu.
   - This will open the **Meeting Type Editor**.
4. Enter the meeting Type and a Description.
   - You can set the printing templates for the Agenda, Public Notice, and Minutes by clicking on the folder icons and browsing for the template files.
5. Click **Save and Close** to return to the **Meeting Types** window.
6. Click **Save and Close** to return to the **Meeting** window.
   - The new meeting type should appear as a selection in the drop-down **Meeting Types** menu.

**CREATING A NEW BOARD**

**NOTE:** A User must have administrator access for Meetings to create a board.

1. Open the Meeting window for a new or existing meeting.
2. Click on the word **Board**.
   - This will open the Boards window.
3. Click the **Add New Board** button.
   - This will open the Boards Editor.
4. Enter the Board Name, and a Description.
5. Add members to the board by clicking on the Contacts button and double-clicking on the contacts to include.
6. Click **Save and Close** to return to the **Boards** window.
7. Click **Save and Close** to return to the **Meeting** window.
   - The new board should appear as a selection in the drop-down **Boards** menu.
CHARGES AND PAYMENTS SECTION

The Charges and Payments section consolidates all of the fees entered in Municity.

MODULE BUTTONS

SEARCH

The Search button opens the Search / Filter Charges and Payments pane at the bottom of the content window.

NEW CHARGE OR PAYMENT

The New Charge or Payment button opens a Fee window where users can enter and add information about a fee or fine.

VIEW

The View button has a drop-down to toggle Reminders on and off.

TABLES

The Tables button lets users access and modify the contents of different Municity items. In the Charges and Fees section, this includes fee items such as:

- Fee types
- Fee Sources
- Payment Types

CONTENT PANЕ

The Charges and Payments window is where users can track or add new fees and fines. In addition, it shows fees generated in other sections of Municity.
To add a new fee or fine:

1. Click on the on the New Charge/Payment button.
   - Users can also right-click in the table and select Add new fee from the pop-up menu.
2. Under the Fee / Fine bar, select the type of payment from the drop down menu. Users must do this before continuing.
   - Some types of fees will auto-fill the amount; others may ask users to fill in additional information (e.g., square footage) to calculate the payment.
3. Complete the rest of the window as needed
   - Users can select the parcel from a menu of recent parcels by clicking the button.
4. Fill in the Payor / Creditor information under the Payor / Creditor Information bar
   - Expand the bar if necessary by clicking the button.
   - Users can select the Payor / Creditor from the Contacts list by clicking the button.
5. Use the button to expand the bars for credit card payments and comments as needed.

Make sure that the Paid box is or isn’t checked as appropriate

- NOTE: The Paid box is checked by default.
6. Click Save and Close at the top of the window /
SEARCH / FILTER - CHARGES AND PAYMENTS

To search for a charge or payment:

1. Click on the **Search** button in the View menu.
   - This opens the **Search Filter / Charges and Payments** window at the bottom of the screen.
   - Users can also click the ▼ button on the **Search Filter / Charges and Payments** bar to expand the window.
2. Enter the search parameters users want to use.
   - Users can apply any combination of the search options.
3. Click the **Apply Search / Filter** button.
   - The window will display entries that fit the search criteria.
4. To view the entire list again, click the **Remove Search / Filter** button.
5. Click the ▼ button to close the **Search** pane.
REPORTS SECTION

The Reports Screen enables Municity users to quickly and easily create reports from data within the system.

MODULE BUTTONS

VIEW

The View button has a drop-down to toggle Reminders on and off.

CONTENT PANES

REPORTS

The Reports content pane lists exiting reports so they can be updated, edited and printed.

To create a new report:
1. In the Reports screen, click on the button.
   ➢ This opens the Report Center window.
2. Use the tabs to navigate to the data users want to report on.
3. Select the data users want to report.
   ➢ Shift-click to select ranges or option-click to select individual items in that Types and Status window.
4. After selecting the data, click the button at the Save Report bottom of the screen.
   ➢ This opens the Report Name window.
5. Type a name for the report in the window and click OK.
   ➢ The Report Editor window will open.
7. Enter the Report Name.
8. Use the Calendar buttons to select the date range for the report.
9. If desired, users can assign the report as a task and assign it to a user.
10. Click the Recurrence tab to set the report as a recurring item.
11. Click Print Report to print it now.
12. Click Save and Close to save the report to the list.

REPORT FILTER

Reports can be filtered by Category or Assigned To as set in the Report Editor
Open the Report Filter pane using the button.

Select the Category and/or user name (Assigned To) from the drop-down menu(s)

Click Apply Search Filter

The filter is automatically cleared when you exit the Reports Section
MUNICITY GIS SECTION

The Municity GIS Mapping Application enables users to view parcel and project locations on a map of the municipality and accomplish other tasks based on that graphic representation.

Users can launch the mapping application by clicking on the Maps buttons in the toolbar or in the section buttons of the Building Department, Planning or Zoning sections.

- Accessing the mapping function from a section button gives users the option of opening a map for the whole municipality or the parcel(s) they are working with.

MENU BAR

ZOOM IN AND ZOOM OUT

The two the magnifying glass buttons at the top of the window to allow users to zoom in or out on the map.
LOCATE

Clicking the Locate button opens a window that lets users search for a parcel based on:

- Parcel ID
- Street Name
- Owner Name

PROXIMITY

The Proximity button opens a Proximity window with three options:

- **Locate**
  Opens a window that lets users search for a parcel
- **Find Proximity**
  Lets users identify parcels within a specified distance from selected parcels
- **Cancel**
  Closes the Proximity window

ROAD

The Road button opens a window that lets users search for properties by street address.

FULL SIZE

The **Full Size** button zooms out to show the entire municipality.

CLEAR

Clears all measurements on the map

REFRESH

Refreshes the current map

PRINT
The print button opens the print widow that gives users two choices:

- **Map**
  Prints the area of the map currently shown in the window, with all current labels
- **Labels**
  Prints address labels for any highlighted parcels

**MAP PROPERTIES**

The Map Properties window has two tabs.

- The **Options** tab has menus to help users work with the map.
- The **Layers** tab allows users to choose different mapping layers, such as roads, sewer lines, and flood plains, if available.

The Map Properties window has three panes.

**MAP LABEL**

Map label selects how parcels are identified on the map:

- Parcel ID
- Legal Address
- Owner
- Account Number
- None

Only one option is available at a time.

**NOTE:** Map labels are only visible when the parcel size is big enough to hold a legible label.

**MOUSE MODE**
The Mouse Mode pane lets users select how the mouse will interact with the map.

- **Rectangle zoom**
  The screen will zoom to fill the screen with the area users selected with the cursor
- **Identify**
  Click on a parcel and a window opens with information about the parcel, including the owner, street address, dimensions and zoning. Tabs provide information on permits, inspections, complaints and pictures. Individual windows will remain open until closed.
- **Select**
  Allows users to select one or more parcels by clicking on them,
- **Measure distance**
  Lets users use the mouse to measure distances on the map.

To measure distances on the map:

1. Select Measure Distance in the Mouse Mode Pane
   - The cursor turns into a pencil
2. Click at the beginning point. Move the cursor to the ending point and click again
   - Users can make as many angles as users want, clicking at each point.
   - Double click to finish.
   - The lengths of each line will display.

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**SELECTED PARCELS**

These options govern how selected parcels will appear in the map. Options include patterns and colors.

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**PARCEL SEARCH**

The Parcel Search window is at the bottom of the Reference pane. (If the search window is collapse / minimized, click on the button.) The Parcel Search window lets users search by Parcel ID or Owner Name. Enter the search item in the appropriate window and hit the button or the ENTER key. If an item is found, it will load as the active parcel.

**NOTE:** Municity searches according to how items are entered in the system. For example, if an owner’s name is listed as John Smith, a search on “Smith” won’t locate it. If more than one item fits the parameter, the Detailed Search window opens listing the items that match the search term.

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**RECENT PARCELS**

The Mapping section has a Recent pane that lists recently accessed parcels. To sort the Recent pane, click the desired heading.
DETAILED SEARCH

Users can run a detailed search by clicking the magnifying glass icon at the upper right of the content pane. This opens the Locate window that users can use to search on other parameters, including:

- Parcel ID
- Street Name
- Owner Name
QUICK REFERENCE

HOW DO I ...

This section provides quick step-by-step instructions for common activities that are handled similarly in the Building Department, Planning, and Zoning sections of Municity.

HOW DO I ADD TASKS?

Municity can automatically add a series of tasks associated with an application. To add this list:

1. Make sure the correct project shows as the active item.
2. Click on the Tasks tab from the Application for permit window.
   - This opens the Add Tasks window.

Select the type of project it is from the pull-down Project Templates menu.

3. Click the Add Template Item to Tasks button.
   - Users will be asked to confirm adding the tasks to the list. Click Yes.
4. The tasks from the template will be added to the table with the present day as the start and due dates.
5. To edit each item, click on it.
   - Users can change dates, assign tasks to individuals and make other changes.

HOW DO I ADD PARCEL INSPECTIONS?

1. Make sure that the correct parcel shows as the active item bar.
2. Click the Interval Inspections tab.
3. The numbers in parentheses show the number of Interval Inspections already associated with that parcel.
   - NOTE: If users want to associate an inspection with a specific application or permit, open the application or permit and work from the Inspections tab.
4. Click on the button at the bottom of the screen
   - Users can also right-click in the table and select Add new Inspection from the pop-up menu.
5. Fill in the appropriate fields in the Inspection window.
   - NOTE: Users must pick a valid Inspection type from the dropdown menu before entering any other information.
   - If users select an inspector and time for the inspection, that information will appear on the inspector’s appointments.
   - Users can access municipal codes by clicking the Codes button in the menu above the tabs.
6. The tabs along the tops of the windows allow users to add additional information, fees, etc.
   - Note that users can set up recurring inspections by clicking the **Rec** tab
7. Click **Save and Close** to add the inspection to the record.

**HOW DO I ADD VARIANCES?**

1. In the **Variances** tab, click on the **Create a New Variance** button at the bottom of the screen
   - Users can also right-click in the table and select **Add new variance** from the pop-up menu.
2. Fill in the appropriate fields in the **Variance** window.
   - **NOTE:** Users must pick a Variance type from the drop-down menu before entering any other information.
3. Users can access municipal codes by clicking the **Codes** button in the menu above the tabs.
4. The tabs along the tops of the windows allow users to add additional information, fees, etc.
5. Click **Save and Close** to add the variance to the record.

**HOW DO I ADD CONDITIONS?**

Users add conditions through the **Conditions** detail tab in the General tab of the Planning or Zoning sections.

1. Click the **Create a New Condition** button at the bottom of the window or right-click in the table and select Add new Condition to this Parcel from the pop-up menu. This opens the Condition editor.
2. Add the information, including a description, type, date effective, and if any follow-up is required, by when and by whom.
3. Tabs allow users to add contacts, notes, documents, or fees to the condition listing, as well as make it recurring.
4. A button at the top of the condition editor window lets users mark it as completed.
5. Click **Save and Close** to add the condition to the database.

**HOW DO I AUDIT?**

The Building Department, Planning, and Zoning sections automatically record when changes have been made to a record. A listing of activities by user, action taken, and when is accessible through the Audit Trail tab.

**NOTE:** Not all users will have access to this section. If you need to refer to this section contact either your local administrator or SCA.

A search pane at the bottom of the window allows users to sort and search the list.
HOW DO I ADD NOTES AND DOCUMENTS?

TO ATTACH AN EXISTING ELECTRONIC DOCUMENT:

1. Click on the Notes Docs tab.
2. Click on the Add Document(s) button at the bottom of the window.

   ➢ This opens the Open screen.
3. Browse within your server for the document(s) users want to attach.
4. Select the document and click the Open button.
   ➢ Users can select more than one document by holding the CTRL key (for individual documents) or the SHIFT key (for a range).
   ➢ NOTE: This creates a new copy of the document within the Municity database. It does not create a link to the original document.

TO SCAN AND ATTACH A HARD COPY DOCUMENT:

1. Load the document in your scanner.
2. Click the Scan Document button at the bottom of the Notes/Docs tab. This opens the Scanner window.
   ➢ Users can click the Settings tab to set up the scanner, if needed.
3. From the Scan tab, click the Scan Document button. This activates the scanner.
   ➢ Users can view the scanned document in the Scan tab window.
4. Click the Save/Add button to save an image of the document in the Municity database.
5. Click the Cancel button to discard the image.

TO ADD AN EMAIL

1. Click on the Add Email button at the bottom of the Notes/Docs tab.
   ➢ This opens the Select Folder screen.
2. Select the email folder containing the email that users want to attach.
3. Double-click the email that users want to attach.

HOW DO I ACCESS AND SEARCH ONLINE CODE?

1. Click on the Codes button in the view menu.
   ➢ A drop-down will allow users to select from the codes available in the system.
2. Selecting one of the codes opens the Code Searcher window.
3. To search for a term within the code, expand the Search pane at the top by clicking the button.

4. Type your search term in the Key Word(s) field and hit Enter.
   - The Code Searcher generates a table that lists the document. Location (e.g., line number) and context.
   - Clicking on any entry in the table will present that reference in the main window, with the search term highlighted.

5. Users can copy and paste any text, as needed, from the code to a note, permit, or other document.

6. Click the OK button at the bottom to close the window

HOW DO I GENERATE ABSTRACT LETTERS?

Abstract letters can be generated as an editable Word document from the Building Department section buttons. To generate a new abstract letter:

1. Make sure that the correct parcel shows as the active item bar.
2. Click the Print button from the section buttons at the top of the screen.
3. Select **Parcel Documents** then **AbstractLetter.doc** from the drop-down menu.

![Parcel Documents](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AbstractLetter.doc</td>
<td>Microsoft Office Word 97 - 2003 Document</td>
</tr>
<tr>
<td>GenencLetter.doc</td>
<td>Microsoft Office Word 97 - 2003 Document</td>
</tr>
<tr>
<td>SepticRepair.doc</td>
<td>Microsoft Office Word 97 - 2003 Document</td>
</tr>
</tbody>
</table>

4. An alert opens with the following message: “This May Take a Moment. Okay to Launch Microsoft Word?” Click **Yes**
   ➢ To edit the original document template, right click on the document name and select **Edit Document Template**. If the document opens to a blank screen press **ALT + F9**

5. You can now edit the Word document as needed. When you exit Word, a copy of your letter is automatically saved in the Notes/Docs section of that parcel.

**HOW DO I ADD DOCUMENTATION TO MEETINGS?**

1. Click on the **Agenda / Minutes** tab in the Meeting window.
2. Right-click on an agenda item to open it.
3. Record any relevant information about the item from the meeting, such as votes, resolutions, etc.
4. Click to save changes to that item.

**HOW DO I ADD A CONTACT?**

1. Go to the **Overview** screen.
2. Click the **General** button on the view menu.
3. Select **Contacts** from the drop-down list.
   ➢ This opens the Contacts list
4. Right-click within the list and select **Add Contact** from the drop-down menu.
   - This opens the **New Contact** window

5. Fill in the information as needed.
6. If Municity is integrated with Microsoft Outlook and you want to include this contact in your Microsoft Outlook Contacts list as well, make sure the **Save as Contact in Outlook** box is checked.
7. Use the **Notes** tab to add more information about the contact, if necessary.
8. Click the **Save and Close** button to add the contact to the list.

**HOW DO I ADD A COMPANY?**

There is a list of Companies that you can also access through the General button of the Overview Screen. You can use this to maintain a database of current information on contractors and suppliers.

1. Go to the Overview screen.
2. Click the **General** button on the view menu.
3. Select **Companies** from the drop-down list.
   - This opens the Companies list.
   - A green check next to the company name means that there is certificate information on file for that firm.
4. Right-click in the list and select **Add New Company** from the popup menu.
   - You can also edit or delete a current company entry from the popup menu.
5. Enter information as appropriate.

6. Use the tabs to add more information about the company, such as existing licenses, permits and escrow accounts.

7. Click *Save and Close* to save the entry.

**HOW DO I PRINT A RECEIPT?**

You can print a receipt for any fee at any time. To do this:

1. Locate the fee in the *Charges and Payments* window.
2. Click to open the fee entry (or right-click and select *Edit Selected Fee* from the drop-down menu).
   ➢ You may want to verify the information before printing.
3. Click the *Print Receipt* button at the bottom of the screen
   ➢ You can print a receipt to a local printer or send it via e-mail.

**NOTE:** The *Paid* box must be checked before a receipt will print.
ABOUT SOFTWARE CONSULTING ASSOCIATES

Software Consulting Associates (SCA) is software development and computer consulting company servicing municipal, commercial, and school district customers. For over 20 years SCA has been providing proven software solutions to municipalities and local governments. Their products are developed utilizing a very high standard of quality and reliability.