Build Eight: Plan Tracking

Databases

1. BLDFEES.FP5
2. BVALS.FP5
3. CHKPNT.FP5
4. COFO.FP5
5. COND.FP5
6. CONT.FP5
7. DEPT.FP5
8. FEEPERM.FP5
9. FEES.FP5
10. LICENSE.FP5
11. LOGIN.FP5
12. MENU.FP5
13. OWNERS.FP5
14. PERMITS.FP5
15. PLAN.FP5
16. PROJECTS.FP5
17. PROP.FP5
18. REVIEW.FP5

General Overview

This build introduces new processes for creating projects and for plan tracking. It also introduces new processes for creating permits as well as several other interface changes.

Solution Tour

This tour will touch on most of the sections in the program since minor changes were made on many of the screens.

After logging into the solution, click on the properties button. Then click on the Browse button. The properties screen has been changed to a tabbed interface. The main tab, titled property, now contains a list of the properties current owners. A check will be displayed next to the primary owner. To view an owner's detailed information, click on the owner's name. The detail screen is similar to the one previously used for secondary owners. Click the property button to return to the previous screen. The mailing address has been removed from the property screen since the mailing address will now be stored in the owners file.

Click on the structures tab to go to the next section. The structures tab contains a list of all building permits that have been issued for the property. To view detailed information for one of the permits, click on the permit number. To return to the previous screen, click the Back button.

Click on the history tab to go to the next section. The history tab contains the ownership history for the property.

Click on the permits tab to go to the next section. The permits tab contains a list of all the permits that have been issued for the property. To view detailed information for one of the permits, click on the permit number. To return to the previous screen, click the Back button.

Click the Menu button to return to the properties menu. Then click the main button to return to the main menu.

To view the Contractors section of the program, click the contractors button and then click the browse button. The contractors section has been changed to a tabbed interface. Several fields have been added to the licenses section located at the bottom of the contractor tab. A renew button has also been added that will renew the selected license for either 90 days or one year depending of whether or not the license is local.

Click on the employees tab to view the next section. The employees tab contains a list of all employees who are authorized to apply for permits on behalf of the contracting company. A new employee can be added by clicking the new button.

Click on the permits tab to view the next section. The permits tab contains a list of all permits that have been applied for by the current contractor. Click on the permit number to view the detailed information for a permit. Click on the Back button to return to the previous screen.

Click on the menu button to return to the contractors menu and then on the main button to return to the main menu.

To view the projects/plan tracking section of the program, click on the projects button. Then click on the browse button. The projects section has been changed to a tabbed interface. A list of the plans that have been submitted has been added to this screen. A plan can be approved or denied by clicking on the corresponding button in the list. To submit a new set of plans, click the new button. Then, enter the number of copies of the plan being submitted and select the departments that need to see the plans from the list. Once all the desired departments have been selected, click the finish button. Transmittals will then be printed for the departments that will receive the plans first.

To view the plan check details, click on the arrow button next to the plan. The plan detail screen contains a list of departments that must check the plans in the top right corner of the screen. Clicking on a department will display the conditions set by that department in the bottom half of the screen. To add a new condition, click on the new button. Conditions can only be added by the plan checker displayed in the department list. To approve a condition, click the corresponding approve button. Conditions can only be approved by the plan checker displayed in the department list. Once all conditions for a plan check have been approved, click the complete button to complete the plan check. A transmittal will then be printed for the next department that needs to review the plans, if any departments are still remaining. To reprint a transmittal for any department, click the Reprint Trans. button and then select the department. To print a list of all conditions for either the entire project, or just the current plan review, click the Print Cond. button. Click the back button to return to the project screen.

Click the permits button to view the next section. The permits section contains a list of all permits that have been issued for this project. Permits can only be issued once plans have been approved and all plan fees have been paid.

Click the menu button to return to the project menu. To review the process for creating a new project, click the new button. The first step is to search for the property that will be associated with the new project. Enter 52 into the Assessors Number field and then click the search button. The next screen will display the selected property's information. If the property found during the search is not the correct property, you can search for a different one by clicking the Change Property button, or create a new one by clicking the New Property button. You can also edit the ownership information of the property by clicking the Edit Ownership button. Click the Next button to continue with the project creation process.

The next screen allow you to enter the project data and to select a contractor for the project. Whether you select yes or no for the plan check option will determine the screen that is displayed next. If you select no, clicking the Next button will bring you to a screen where you can issue permits for the project. Permits can be created by clicking the New button. (The entire permit creation process will be outlined later in this document.) Click the finish button to print the project documents and complete the creation process.

If you select yes for plan check, clicking the Next button will bring you to a screen where you can enter payments for the plan review fees. Once any payments are entered, click the next button. You can then enter the number of copies of the plans that are being submitted and select the departments that must review the plans. Once all departments have been selected, click the finish button to print the project documentation and the transmittals for the first departments that will receive the plans. You will then be taken to the project data entry screen.

Click the menu button to return to the projects menu. Then click the main button to return to the main menu.

To view the permits section, click on the Permits button, and then on the browse button. The permits section has been changed to a tabbed interface. The permits have been divided into three tabs: application, charges, and reviews. There is also a tab titled Occ. Cert. for certificates of occupancy. This tab only appears if the current permit being viewed is a building permit. The data on the tabs have not changed since the previous build; it is has just been reorganized to allow for easier navigation.

Click the menu button to return to the permits menu. To view the new permit creation process, click the new button. Click new when asked if you would like a new or supplemental permit. The first step is to search for the property that will be associated with the new permit. Enter 52 into the Assessors Number field and then click the search button. The next screen will display the selected property's information. If the property found during the search is not the correct property, you can search for a different one by clicking the Change Property button. You can also edit the ownership information of the property by clicking the Edit Ownership button. Click the Next button to continue with the permit creation process.

The next screen allow you to enter the permit information. The valuation field is only required if you are creating a building permit. When you click the next button, you will be asked if you would like to create an additional permit. Any additional permits you create will be for the same property that you have already selected. This option has been added to save time when multiple permits are required for one property.

The next screen asks you to select a contractor for the permit(s) you have created. You must also select the person who is applying for the permit. This is done by either clicking the owner button, or clicking on one of the names in the authorized applicants list.

When you click the next button, if you are creating a single permit, you will be brought to the permit charges screen to enter the charges for the permit. If you are entering multiple permits, you will be brought to a list of all the permits. You can then go to each permit individually and enter the permit charges. When you are finished entering charges, click the finish button and the permits will be printed. You will then be returned to the permit menu. Click the main button to return to the main menu.

The inspections section has not changed much in this build. The only significant difference is a data entry screen has been added. This screen can be seen by clicking on the inspections button from the main menu, and then on the browse button.

Build Nine Objectives

Our next task will be to make any final changes/additions to the program as required.

Feedback Requested

1. I have a document that outlines the permit fees. In that document, it states that the plan review fees are a percentage of the permit fees (70% for building permits, 25% for all other permits). Since permits aren't issued until after the plan review is completed, how do I calculated the fees?

Build Eight: Time Log

Date	Notes	Hours	Billable
May 29, 2000	Designed tabbed interface for the permit section of the solution. Incorporated tabs for application information, charges, and inspections/reviews.	2.42	Yes
May 29, 2000	Designed tabbed interface for the property section of the solution. Incorporated tabs for ownership history and past permits.	1.5	Yes
May 29, 2000	Designed screens for new property entry to match design of new tabbed interface. Added scripts to create primary owner when creating a new property.	.58	Yes
May 31, 2000	Added additional fields to Contractor list view. Added sort routines for sorting the contractor list view.	1.42	Yes
May 31, 2000	Designed tabbed interface for the contractor section of the solution. Incorporated tabs for general information, authorized employees, and permit history. Modified scripts for creating new contractors.	1.67	Yes
June 1, 2000	Revised new permit process. Added screen for editing of ownership information for the selected property. Added ability to generate multiple permits at once.	3.58	Yes
June 2, 2000	Began revision of inspection screens. Implemented modifications to the scripts used to create new inspections.	.75	Yes
June 2, 2000	Implemented changes to the search screen in the contractor section. Added scripts for renewing contractor licenses.	1.17	Yes
June 2, 2000	Began redesign of project data entry process. Created plan file and relationship from the project file to the plan file. Changed property selection screen to match design used for new permits. Added option to select contractor to new project process.	2.58	Yes
June 3, 2000	Continued work on new project creation process. Added scripts to create new permits when no plan	1.33	Yes

	review is required.		
June 3, 2000	Began work on design of project screen interface. Added list of all plans submitted and scripts to create new plans. Created condition file and began work on interface for viewing plan conditions.	1.75	Yes
June 3, 2000	Changed interface of property ownership data entry screens to accommodate new fields that were added.	.67	Yes
June 8, 2000	Continued work on interface for displaying plan check conditions.	.58	Yes
June 8, 2000	Changed permit payment entry sections to match project payment entry. Added a permits tab to the project screen.	1.58	Yes
June 8, 2000	Added sorting scripts to the project list. Changed fields on the list to accommodate the other changes made to the solution.	.84	Yes
June 9, 2000	Added field to calculate project/plan expiry date. Added validation to project functions to stop creation of new plans/permits until all past fees are paid.	1.08	Yes
June 9, 2000	Changed lookups on the property owner to retrieve information from the owners file rather than the property file. Removed option to edit ownership information from the property file since this in now done from the owners file.	.84	Yes
June 9, 2000	Began planning of the plan tracking process. Created departments file to store department names and plan checkers. Created plan transmittal printout.	1.08	Yes
June 9, 2000	Designed screen for creation of new departments and selection of the plan checker.	.42	Yes
June 12, 2000	Added screen to new project process to allow for selection of departments that will be checking the plans. Created script to remove department from list if selected accidentally.	1.25	Yes
June 12, 2000	Continued work on plan check interface. Added list of departments that must see the plans to the plan detail screen.	.84	Yes
June 14, 2000	Added ability to track number of plans submitted and automatically assign plans to departments when creating new project.	.84	Yes
June 16, 2000	Created scripts to print transmittals after the creation of a new project.	.5	Yes