

**FINAL DRAFT**

A background image of a city skyline, likely New York City, is visible through a semi-transparent green overlay that features wavy, organic shapes at the bottom of the page.

# **Inspections**

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MS Govern  
Inspections  
Govern for Windows™  
Version: 1.0

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## Preface

Welcome to Govern for Windows, a comprehensive and fully integrated transaction-driven system written exclusively for local governments. Govern includes a wide variety of database modules:

### **Computer-Assisted Mass Appraisal (CAMA)**

- Appeals & Grievances
- Appraisals / Property Valuations
- Comparables Sales Management

### **Financial Management**

- Account Receivable
- Cash Collection

### **Land Management**

- Business & Individual Licenses
- Complaint Tracking
- Leasing
- Permit Tracking & Inspection Scheduling
- Planing
- Violations

### **Revenue Management**

- Aircraft & Boat Excise Tax
- Miscellaneous Billing
- Personal Property Tax Billing
- Real Property Tax Billing
- Self-Reported Tax Billing
- Special Assessments
- Tax Title / Tax Lien / Tax Sales
- Utility Billing

Since 1980, MS Govern has worked hand-in-hand with State and Local Governments to simplify the implementation of software solutions that automate the flow of information related to their properties.

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## Introduction: Inspections



### Overview

Inspections are a part of the *Permits and Inspections* module. The *Permits and Inspections* module, also known as *Land Management*, has been designed to allow for tracking of all the activities regarding the Building, Health, Code Enforcement, Planning and Zoning departments' application, as well as the scheduling of inspections and issuance of permits within the organization.

This system also allows for an unlimited number of departments to track all activities relevant to a parcel of land or the property records.

For each type of permit, you can define all the required steps to complete the process.

You can define activities that can query other databases in order to apply business rules, schedule automatic inspections, and set up reminders to issue critical messages based on a future date, or act as a "tickler file" or "to do" list.

Table-driven, user-definable, the system provides for and improves communication and coordination within and between departments. All new construction, variances or zoning changes that have taken place on properties are stored in the system.

A flexible database structure allows for the recording and retrieval of various land-related data that can differ for each type of permit or decision. Applications for permits and inspections for buildings, including review of the electrical or the plumbing system can be entered into the system. Once the information is entered, the on-line inquiry will aid in the investigation or the issuance of a permit or any other activity for a particular property.

This guide describes the Inspections configuration and functionality, in Govern. For details on permits, refer to the *Permits* guide. For details on the *Mobile and Desktop Inspection* modules, refer to the *Mobile and Desktop Inspection* guide.

## Documentation Conventions

**Permit:** Throughout this guide, the term *Permit* is used as a general term to refer to all the permit functions or *Permit Kinds*. These include the Building, Electrical, General and Plumbing Permits; Business and Animal Licenses, Approvals, Bonds, Decisions, Prosecutions and Appeals.

**Workflow:** Similarly, the term *Workflow* refers to complaint, grievance and request for services as well as workflow.

# Admin Overview



## Overview

This guide is divided into four parts. The *Administrative Setup* describes the user security, the validation tables and the configuration required for the Mobile Inspection and DeskTop Inspection components. The *User Interface* describes the Web interface, as viewed by the Inspectors and Schedulers, online. The *Batch Processing* section describes the batch process for the Inspections modules. A *Glossary* is included to define the terms that are specific to Govern's Inspection module and eGovernment solutions.

## Administrative Setup

The *Administrative Setup* provides an overview of the administrative forms and information required to set up Govern's Inspections module.

### System-Level Parameters

The *System Maintenance Registry* form includes three new tabs for defining parameters for the eGovernment solutions, including the Mobile Inspection and DeskTop Inspection components, the *eProfile* and the *eComponents: ePermits, eComplaint, eGrievance and eRequest for Services*.

Several parameters are common to all eGovernment solutions. In addition, you need to set one parameter that is specific to the *Mobile Inspection* and *DeskTop Inspection* components. This is to determine whether users can view data from multiple departments or from their Primary Department only. *Refer to the eProfile guide for details.*

### Defining User Permissions

User permissions include: user access throughout Govern, access to *Outlook Scheduling*, department-level access, user-level access to the *Inspections* function, user access to the batch *Automatic Rescheduling* process and *Defining Validation Tables and Codes*.

## Defining Validation Tables and Codes

Before launching the Inspections function or setting up Activities and Inspection Schedules, you need to set up the following user validation tables:

- Inspection Types or Codes (Table: VT\_USR\_INSPECT)
- Inspection Type Reason Codes (VT\_USR\_PMINTYRE)
- Inspection Type Status (VT\_USR\_PMINTYST)
- Activity Completion Status.
- Inspection Territories (VT\_USR\_INSPTER).
- Inspection Territories by Department (VT\_USR\_XXX, where XXX is the name you give the table)

*See Defining Inspection Types or Codes on page 17.*

## Outlook Scheduling

For updating schedules and task lists, you can integrate Govern for Windows with Microsoft® Outlook®. When a user schedules an inspection in Govern, the inspectors' Outlook Calendars and Task Lists are automatically verified and updated. Similarly, when inspection scheduling is automatically generated through a System Activity, the Inspector's Outlook Calendar is verified and the inspection is scheduled for the next available time slot. Appointments scheduled through Outlook are automatically displayed as blocked time on the Inspector's Schedule in Govern. *See Integrating Govern with Outlook on page 48.*

## Integrating Govern with Outlook

Use the procedures in this section to integrate Govern for Windows with Microsoft® Outlook®. Then, when a user schedules an inspection in Govern, the inspectors' *Outlook Calendars* and *Task Lists* are automatically verified and updated.

Similarly, when inspection scheduling is automatically generated through a *System Activity*, the Inspector's Outlook Calendar is verified and the inspection is scheduled for the next available time slot.

Appointments scheduled through Outlook are automatically displayed as blocked time on the *Inspector's Schedule* in Govern.

*See Integrating Govern with Outlook on page 48.*

## Inspection Types or Codes

The *Inspection Code* form is used to define the different types of inspections that can be performed. See *Defining Inspection Types or Codes* on page 17.

## Inspection Calendars and Schedules

Inspection calendars and schedules are used for defining dates and times for inspections. They can be created at three levels:

- Organizational, on the *Organizational Calendar* form.
- Departmental, on the *Departmental Calendar* form.
- Individual Inspector, on the *Inspector's Schedule* form.

All inspection calendars and schedules are created by inspection territory. They define the:

- Days that inspections can be performed; such as, Monday to Friday
- Starting and ending times for performing inspections
- Number of inspections to be performed each day
- Minimum duration of an inspection

In addition, the *Inspector's Schedule* defines the following:

- Inspector
- Inspection Types
- Name and Address record creation and modification
- Inspector Unavailability, during normally scheduled days

See *Defining Inspection Calendars and Schedules* on page 29.

## Defining Inspection Schedules and Calendars

For defining default inspection scheduling parameters, Govern provides the Organizational Calendar, Department Calendar and the Inspector's Schedule.

The Organizational and Departmental Calendars are used to define common parameters for scheduling inspections, within an organization or department, for example, the days and times that inspections are performed.

The Inspector's Schedule is a required form. Before you can assign an inspector to an inspection, you need to create an Inspector's schedule, defining the inspector's availability, territory and inspection types.

Calendars and Schedules are the same for Govern, the Mobile Inspection and DeskTop Inspection components. See *Defining Inspection Calendars and Schedules* on page 29.

## Defining Organization-Wide Inspection Parameters

The basic parameters for inspection scheduling and activity status are set on the Land Management Parameters form. These parameters apply to all departments within the organization. See *Defining Inspection Parameters* on page 61.

## Defining Department-Level Inspection Parameters

Basic settings for automatically generated inspections and inspection fees are defined at the department level. For the Mobile Inspection and DeskTop Inspection components, there are two settings. These are defined on the Permit Parameters form and are the same for all inspections created by or generated from the department.

An inspector can be automatically assigned to a Scheduled Inspection, generated from a System Activity. This is set up at the department level. In addition, a fee can be automatically generated as the result of a failed or

incomplete inspection. This type of fee is defined at the department level.

See *Defining Department Level Parameters* on page 67.

## Generating Inspections through System Activities

Both Scheduled and Unscheduled Inspections can be automatically generated from a System Activity. Similarly, inspections can be generated from an Offense or Workflow process.

Using the Permit System Activities form in Govern Admin, you can define the type of scheduling, i.e., Scheduled or Unscheduled; the point in the activity at which you want to schedule the inspection, for example, at the initiation or completion of the activity; and the Inspection Types, to assign.

See *Generating Inspections through System Activities* on page 72.

## Associating Violation Codes with Code Types

The *Violations (Code Type & Remedies)* form is used to associate a *Violation Code* with specific *Code Types*, and associated remedies. See *Define Violations / Remedies for Offences* on page 22.

## Batch Processing

### Automatic Inspection Rescheduling

This section describes the batch Automatic Inspection Rescheduling. This process schedules inspections that need to be performed at regular intervals, for a set period of time, for example, a building project that needs to be inspected every two weeks until the completion of the building or the expiration of the permit. See *Automatic Inspection Rescheduling* on page 145.

### Inspector's Database

For inspectors who need to access the database offline to view an update inspection database, Govern includes three batch processes:

Run the Export to an Inspector's Database process to extract a copy of a database or a portion of a database, to your computer hard drive. This extracted database can then be copied to a laptop and used by an inspector out in the field. See *Export to an Inspector's Database* on page 150.

Run the Import from an Inspector's Database process to import a database from an inspector's local drive to the network. See *Import from an Inspector's Database* on page 157.

The *Use an Inspector's Database at Next Startup* option is automatically enabled when the Export to an Inspector's Database process is run. This acts as a reminder to use the exported database at the next startup and prevents the inspector from omitting to import the data from the laptop. See *Use an Inspector's Database at Next Startup* on page 159.

*For the system requirements and required configuration, refer to the Getting Started guide.*

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## Glossary

This guide includes a glossary of terms specific to Govern's Inspection module and eGovernment solutions. See *Glossary on page 160*.



# Defining User Permissions



## Overview

Define the following:

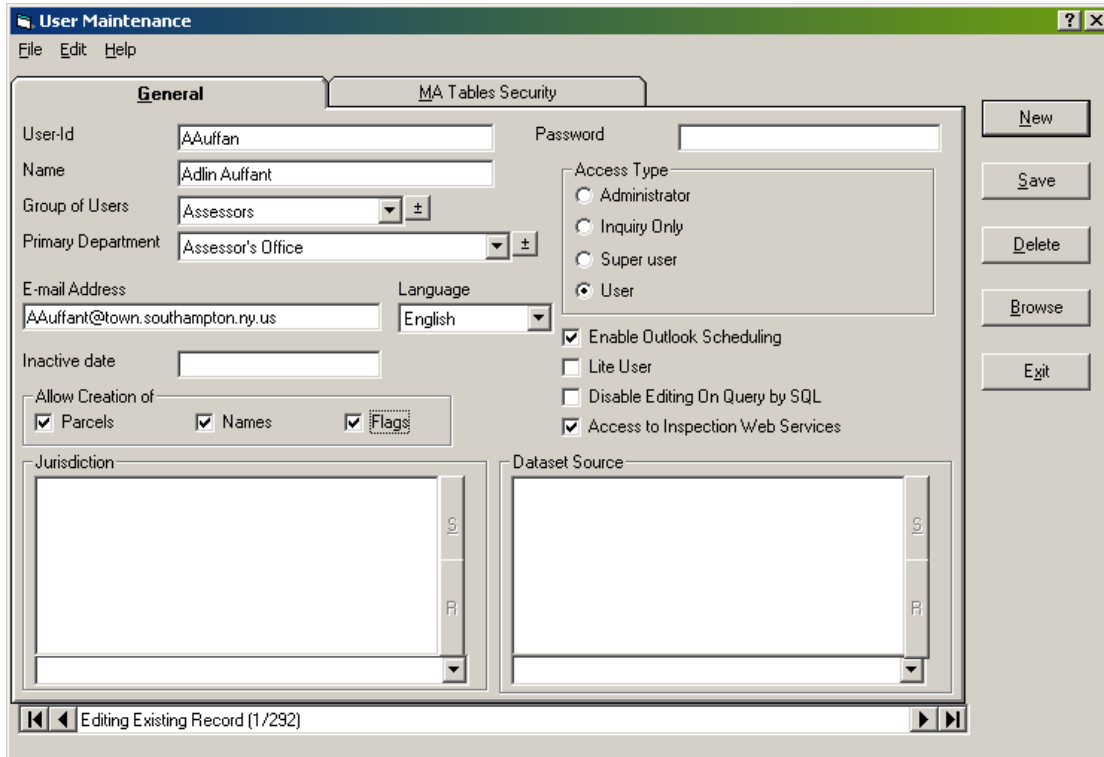
1. User access throughout Govern
2. Access to Outlook Scheduling
3. Department level access
4. User access to the Inspections function
5. User access to the batch Automatic Rescheduling process

## Defining the Govern User ID and Access Type

You need to assign a User ID and User Access Type to all inspectors and schedulers logging in to the Mobile Inspection, DeskTop Inspection or to Govern for Windows. This Access Type applies throughout Govern. You then need to define an Access Type for each user function.

To assign a user ID and *Access Type*:

1. Launch Govern Admin.
2. Select *Setup* > **User Maintenance**.



3. Click New to create a new user account. Otherwise, navigate to the user's record and skip to step 6.
4. Enter a User ID. This ID is also used as the Account ID, for logging in to the Mobile Inspection and DeskTop Inspection components. The password is set according to the type of authentication defined on the Web Configuration tool. *Refer to Govern Net Admin Application (GNAA) guide for details.*
5. Select a Primary Department for the user. Access permissions are defined first by department, then by user. *See Granting Department Access to the Inspections Function on page 12.*
6. Select one of the following Access Types:
  - **Administrator:** to grant the user access to all menu options with the exception of the system tables. This type is recommended for the *System Administrator*.

- **Super User:** to grant the user access to all functions, forms and features, including the system tables.

**Note:** This type of access needs to be limited. Otherwise, you may jeopardize the integrity of the software.

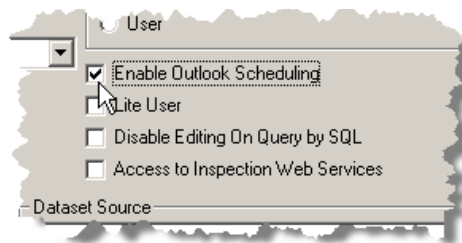
- **User:** to grant the user access to only the functions, forms and batch processes assigned by an administrator or Super User. See Granting User Permissions to the Function on page 12.
- **Inquiry Only:** to grant the user view-only access to the functions and forms as defined by an administrator or Super User.

7. Click **Save**.

## Enabling Automatic Scheduling in Govern

If you are integrating Govern with Microsoft® Outlook® for Inspection Scheduling, you need to perform the following procedure for all schedulers. See Integrating Govern with Outlook on page 36 for further information.

1. In Govern Admin, select Setup > User Maintenance to launch the User Maintenance form.
2. Navigate to the applicable user record.



3. Select **Enable Outlook Scheduling**.

**Note:** The *Govern User ID* must be identical to the Exchange User ID defined for the e-mail account.

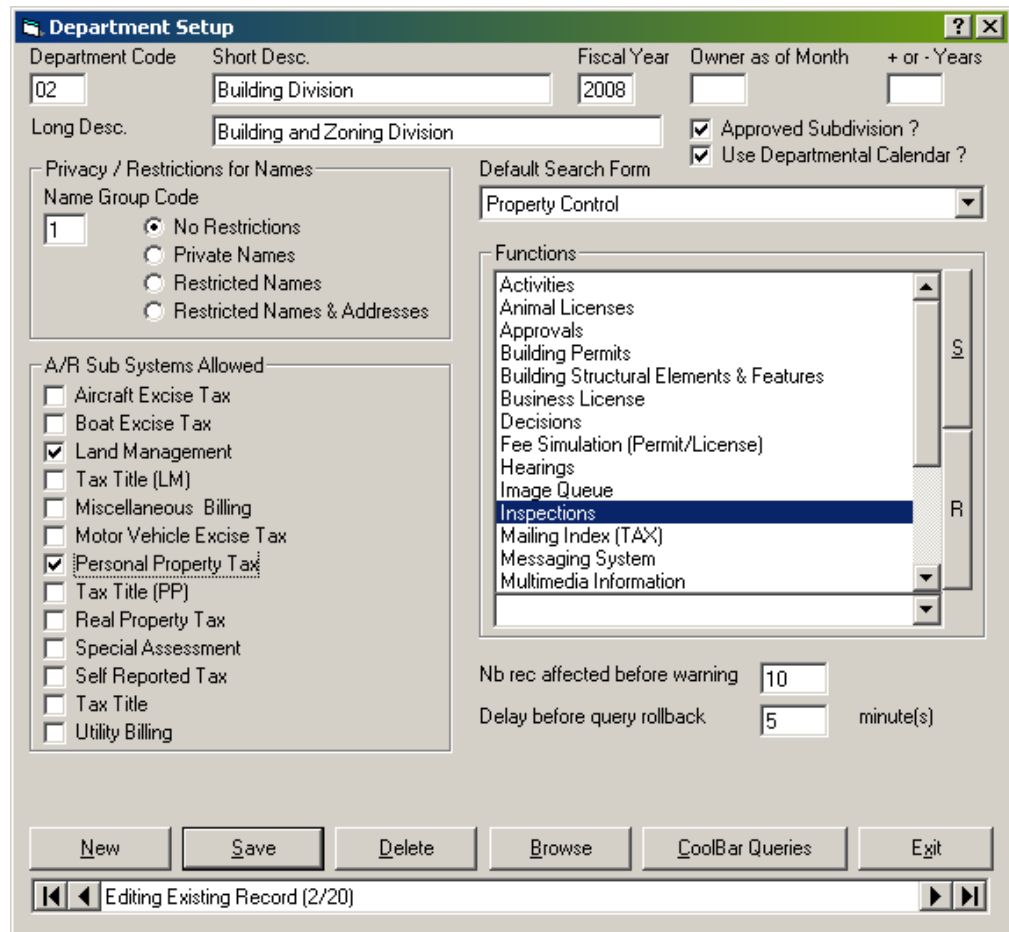
4. Repeat this procedure for each scheduler.

## Granting Department Access to the Inspections Function

Grant department access to the Inspections function for all departments maintaining inspections. Then, set the Access Type for each user. See Granting User Permissions to the Function on page 12

To grant department access:

1. Launch Govern Admin.
2. Select Setup > Department Setup.



**Department Setup**

Department Code: 02    Short Desc.: Building Division    Fiscal Year: 2008    Owner as of Month:    + or - Years:   

Long Desc.: Building and Zoning Division    ☒ Approved Subdivision ?    ☒ Use Departmental Calendar ?

Privacy / Restrictions for Names  
Name Group Code: 1    ☒ No Restrictions    ☐ Private Names    ☐ Restricted Names    ☐ Restricted Names & Addresses

A/R Sub Systems Allowed  
☐ Aircraft Excise Tax  
☐ Boat Excise Tax  
☒ Land Management  
☐ Tax Title (LM)  
☐ Miscellaneous Billing  
☐ Motor Vehicle Excise Tax  
☒ Personal Property Tax  
☐ Tax Title (PP)  
☐ Real Property Tax  
☐ Special Assessment  
☐ Self Reported Tax  
☐ Tax Title  
☐ Utility Billing

Default Search Form: Property Control

Functions:  
 Activities  
 Animal Licenses  
 Approvals  
 Building Permits  
 Building Structural Elements & Features  
 Business License  
 Decisions  
 Fee Simulation (Permit/License)  
 Hearings  
 Image Queue  
**Inspections**  
 Mailing Index (TAX)  
 Messaging System  
 Multimedia Information

Nb rec affected before warning: 10    Delay before query rollback: 5 minute(s)

Buttons: New, Save, Delete, Browse, CoolBar Queries, Exit

Status: Editing Existing Record (2/20)

3. Select *Inspections* from the **Functions** drop-down list to add it to the functions available to the department.
4. Click **Save**.

## Granting User Permissions to the Function

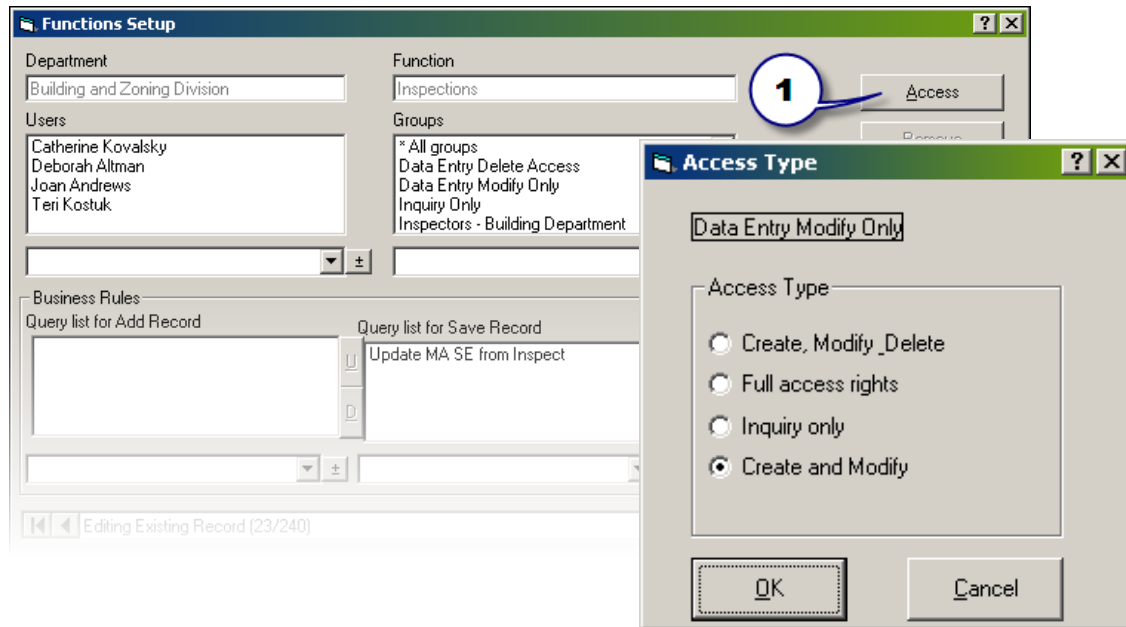
Open the Function Setup form to grant default access to all members of the department, who need to access the Inspection function. The default access is read-only. Then, select an Access Type to define the level of security for each user.

To define user permissions for the Inspections function:

1. Launch Govern Admin.
2. Select *Setup* > **Functions Setup**.  
You can also access this form by highlighting the function on the *Department Setup* form and click **S** in the *Functions* group.
3. Click **Browse** and select *Inspections* in the user's Primary Department section.
4. Select all the inspectors and schedulers to whom you are granting user permissions, in the User drop-down list, to add them to the User list box.

**Tip:** Use the **Ctrl** and **Shift** keys to select a number of users, if you are granting the same access to more than one user. You can also select a group of users. However, a user can be a member of one group only.

5. Highlight a user in the list and click **Access** to modify the Access Type. Otherwise, skip to step 8.



6. Select one of the following:
- **Create, Modify, Delete:** to grant the permission to create, modify and delete records. The user does not have access to the Automatic Rescheduling setup.
  - **Full access rights:** to grant access rights to all records and menu options, including the Automatic Rescheduling setup.
  - **Inquiry Only** to provide read-only access
  - **Create and Modify** to grant the permission to create and modify, but not delete records. The user does not have access to the *Automatic Rescheduling* setup.

**Note:** *Inquiry Only* is the default *Access Type*.

**Note:** Super Users have Full Access Rights to all functions, regardless of the *Access Type* selected.

Note: *Inquiry Only* is the default *Access Type*.

7. Click **OK** on the Access Type screen.
8. Click **Exit** to close the form.

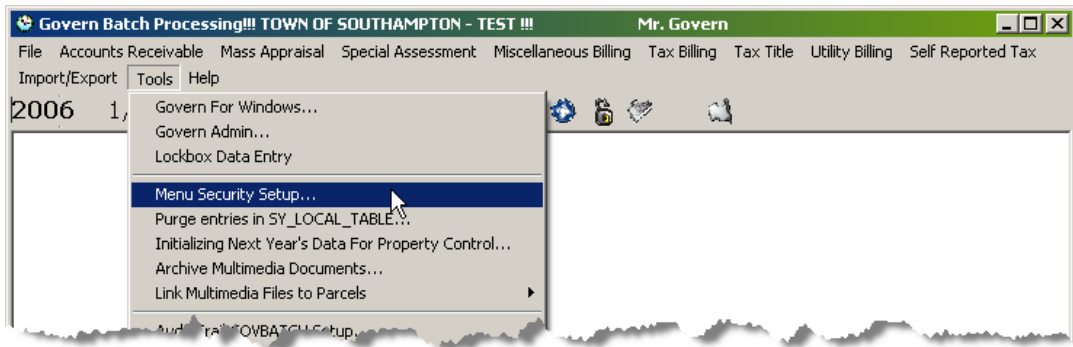
See *Modifying Inspection Details* on page 62, for further information.

## Granting User Permissions to the Batch Automatic Inspection Rescheduling Process

The batch Automatic Inspection Rescheduling process creates a number of new inspection records by assigning a series of new dates and times to an inspection that needs to be performed at regular intervals up to a set date, for example, a building inspection that needs to be performed every two weeks until the completion of the building or until the expiry date set for the permit.

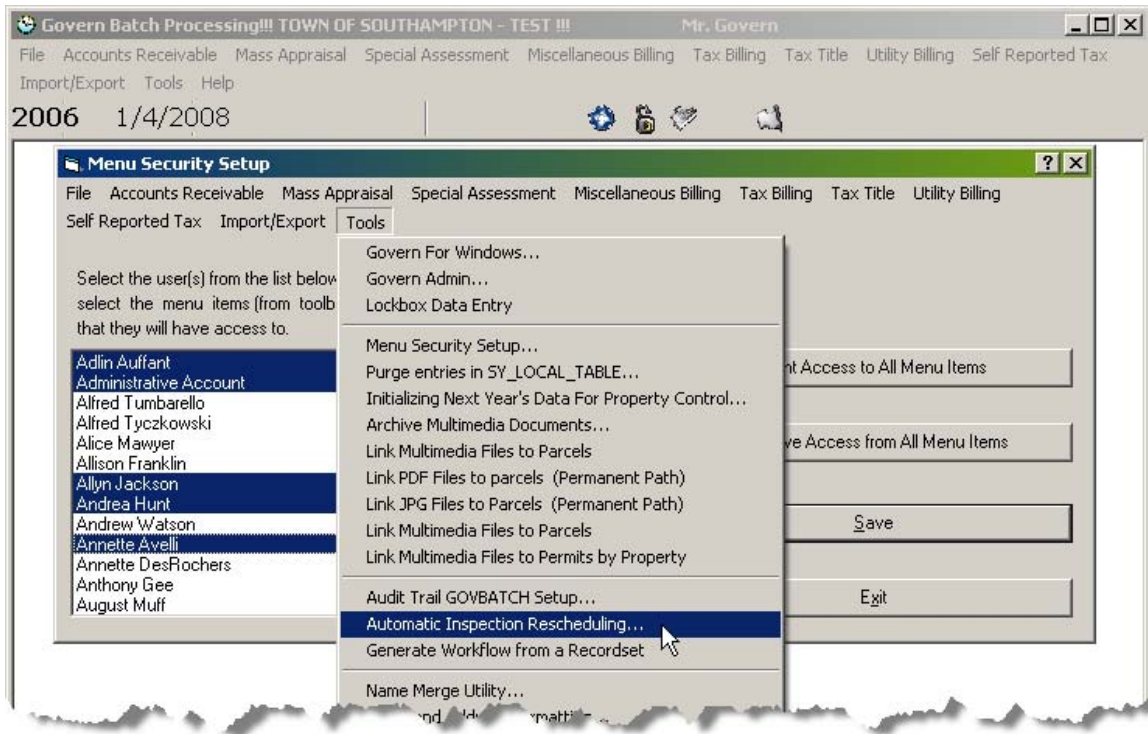
To grant user permissions to the process:

1. Launch *Govern Batch Processing*.
2. Select **Tools > Menu Security Setup**.



3. Highlight all the inspectors and schedulers to whom you are granting user permissions in the **User** list box.
4. Select **Tools**, on top of the *Menu Security Setup* form.

### 5. Select **Automatic Inspection Rescheduling**.



### 6. Click **Save**.

See *Automatic Inspection Rescheduling* on page 99 for details on running this process.

## Setting the Authentication Type

You need to define an *Authentication Type* for the *Mobile Inspection* and *DeskTop Inspection* components. Refer to the *Web Configuration* section in *Govern's .NET Toolkits guide*, for details.



# Defining Validation Tables and Codes



## Overview

Before launching the Inspections function or setting up Activities and Inspection Schedules, you need to set up all the validation tables containing inspection data. These include:

- Inspection Types or Codes (Table: VT\_USR\_INSPECT). See *Defining Inspection Types or Codes on page 17*.
- Inspection Type Reason Codes (VT\_USR\_PMINTYRE). See *Defining Inspection Type Status and Reason Codes on page 19*.
- Inspection Type Status (VT\_USR\_PMINTYST). See *Defining Inspection Type Status and Reason Codes on page 19*.
- Activity Completion Status. See *Defining the Activity Completion Status on page 20*.
- Inspection Territories (VT\_USR\_INSPTER). See *Defining Inspection Territories on page 24*.
- Inspection Territories by Department (VT\_USR\_XXX, where XXX is the name you give the table)

For more information on user validation tables, refer to the *Validation Table section of the Super User guide*.

## Defining Inspection Types or Codes

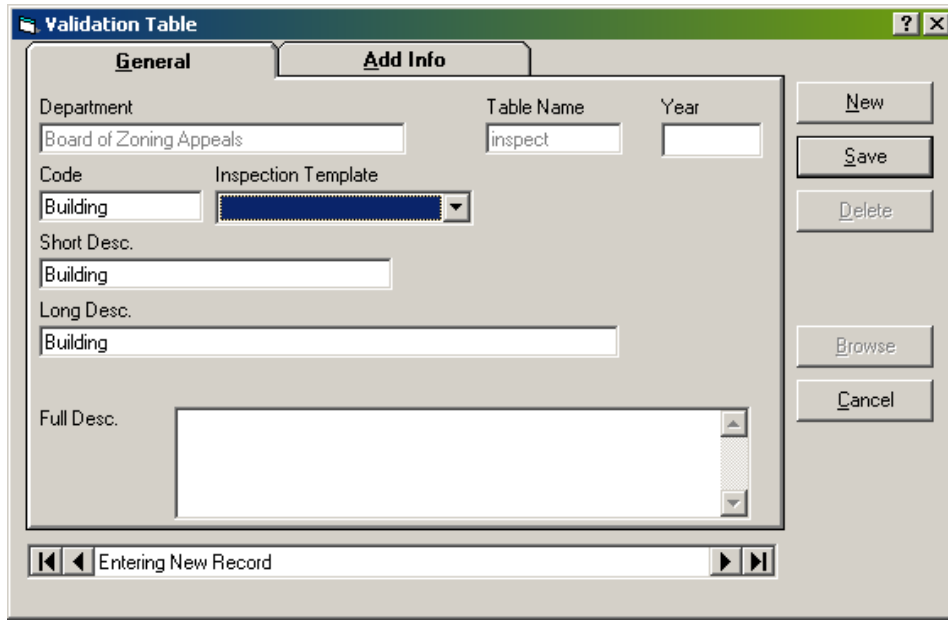
Inspection Types or Codes are user-defined codes for classifying the inspection, according to what is inspected, for example, framing, landscaping, water or damage. They are defined, by department in Govern Admin, on the Inspection Code form and are saved to the VT\_USR\_INSPECT table.

An inspection record can include multiple *Inspection Types*. When completing a record, the inspector selects the Inspection Type, assigns a status, such as *Passed*, *Failed* or *Incomplete* with a reason code and adds notes and comments. See *Defining Inspection Type Status and Reason Codes on page 19*.

To define Inspection Types or Codes:

1. Launch *Govern Admin*.

2. Select *Parameters > Land Management > Parameters > Inspection Codes*.



3. Enter a code, short description and long description.
4. Click **Save**.

**Note:** The **Full Description** and **Year** fields are not applicable to the *Inspection Types* or *Codes*.

*Inspection Types* are displayed on the following forms and functions.

- In *Govern Admin*:
  - Permit System Activities, Activities (Offense Function) or Activities (Workflow Function): Inspection Types can be assigned to the inspection when you set up the activity
  - Inspector's Schedule: Inspections Types are assigned to an Inspector
  - Inspection Codes: the Inspection Types are created on the Inspection Codes form
- In *Govern*:
  - Inspections function: All the Inspection Types created by the department are listed on the Inspections function. The Inspection Types assigned to the selected inspector appear in black, the others in red. However, you can select any Inspection Type for the inspector, when you schedule the inspection.
  - User prompt, when the activity is performed

- Inspection Search and Results
- Mobile Inspection and DeskTop Inspection components:
  - Inspection Details
  - Inspection Scheduling
  - Advanced Inspection Search

## Defining Inspection Type Status and Reason Codes

While performing an inspection, in the field, the inspector can log in and enter the following details for the Inspection Type:

**Inspection Status:** The Inspection Type status is not the same as the Inspection Status. This is a user-defined code, selected by inspector to rate the inspection, such as Passed, Failed or Incomplete (Table: VT\_USR\_PMINTYST).

**Reason:** Select a Reason for an Incomplete or Failed Inspection. The Inspection Type Reasons are user-defined (Table: VT\_USR\_PMINTYRE).

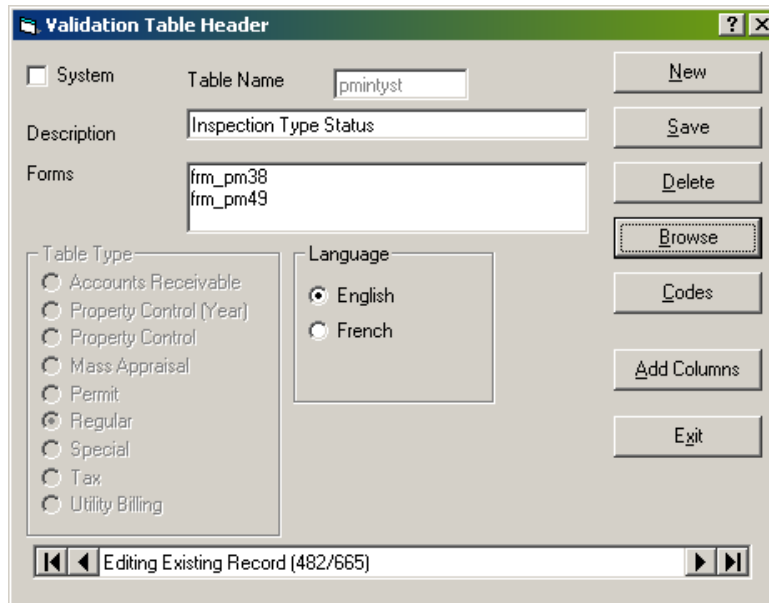
**Notes:** Unlimited space is provided for notes and comments.

A fee can be automatically generated as the result of a failed or incomplete inspection. This type of fee is defined at the department level, on the Permit Parameters form. The administrator needs to associate the fee with a Reason Code. *See Defining Department Level Parameters on page 67, for details.*

You need to create the Inspection Type Status and Reason Codes, before defining the fee or launching the Mobile Inspection and DeskTop Inspection components.

To define the Inspection Type Status codes:

1. Launch *Govern Admin*.
2. Select *Setup > Validation Tables* to open the *Validation Table Header* form.



3. Click Browse and select the Inspection Type Status table, **pmintyst**.
4. Click Codes.
5. Enter a code, short description and long description for the first code.
6. Click Save.
7. Repeat this procedure for each status you are creating, for example, Passed, Failed and Incomplete.

To define Inspection Type Reason Codes:

1. Follow the procedure for the Inspection Type Status, with the following exception:  
In Step 3, select the *Inspection Type Reasons Code* table, **pmintyre**.
2. Click **Save**.
3. Repeat the procedure for each reason code.

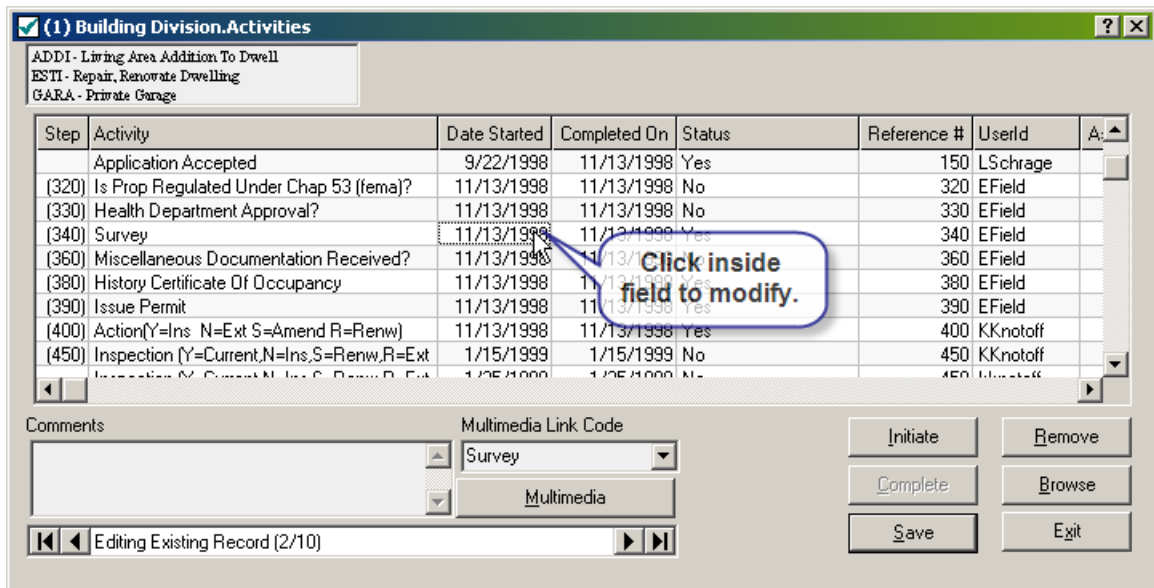
## Defining the Activity Completion Status

For each permit, offense and complaint type, an Activity Setup is defined. This outlines the steps required to complete the permit, offense or complaint process. System Activities, or the actions or events in the process, such as

## Defining Validation Tables and Codes

receiving the application and issuing the permit are linked to the activity steps. See *Glossary on page 160*, for further details.

A default activity status is assigned to each activity step, after it is performed. This is displayed on the Activities function in *Govern for Windows*. Govern users with the required permissions, can modify the *Activity Completion Status*.



Step	Activity	Date Started	Completed On	Status	Reference #	UserId
	Application Accepted	9/22/1998	11/13/1998	Yes	150	LSchrage
(320)	Is Prop Regulated Under Chap 53 (fema)?	11/13/1998	11/13/1998	No	320	EField
(330)	Health Department Approval?	11/13/1998	11/13/1998	No	330	EField
(340)	Survey	11/13/1998	11/13/1998	Yes	340	EField
(360)	Miscellaneous Documentation Received?	11/13/1998	11/13/1998	Yes	360	EField
(380)	History Certificate Of Occupancy	11/13/1998	11/13/1998	Yes	380	EField
(390)	Issue Permit	11/13/1998	11/13/1998	Yes	390	EField
(400)	Action(Y=Ins N=Ext S=Amend R=Renw)	11/13/1998	11/13/1998	Yes	400	KKnotoff
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext	1/15/1999	1/15/1999	No	450	KKnotoff

Two default Activity Completion Statuses can be assigned to an activity, as the result of an inspection. See the *Permit System Activities: Page 1 tab in the Permits and Licenses guide* for details.

The activity completion statuses are saved to VT\_USR\_PMACTAW. This table includes the **Yes**, **No** status and two statuses, that you can customize, **Special - User Defined Status 1 and 2**.

To define customized activity statuses:

1. In *Govern Admin*, select **Setup > Validation Table**.
2. Click **Browse** and select the *Permit Activities Answers, pmactaw*, validation table.
3. Click **Codes**. Scroll to the third code and change the short description and the long description.

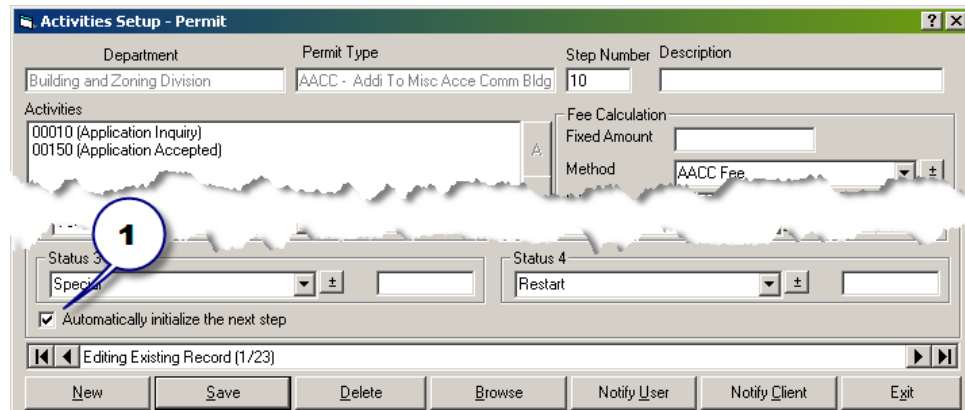
4. Click **Save**.

**Note:** Do not change the code values. These must read 1, 2, 3, 4.

See *Generating Inspections through System Activities* on page 72.

## Validation on Activities Linked to an Inspection

When multiple activities within a step exist, and one of these activities is set to automatically trigger an inspection, there will be a validation that all activities within the step are completed. If the option “**Automatically initialize the next step**” is selected for this current step, the next step is initiated; when this option is not selected, activity steps must be completed before the next step is initiated. *For details, refer to Automatically initialize the next step in the Permits & Licenses guide.*

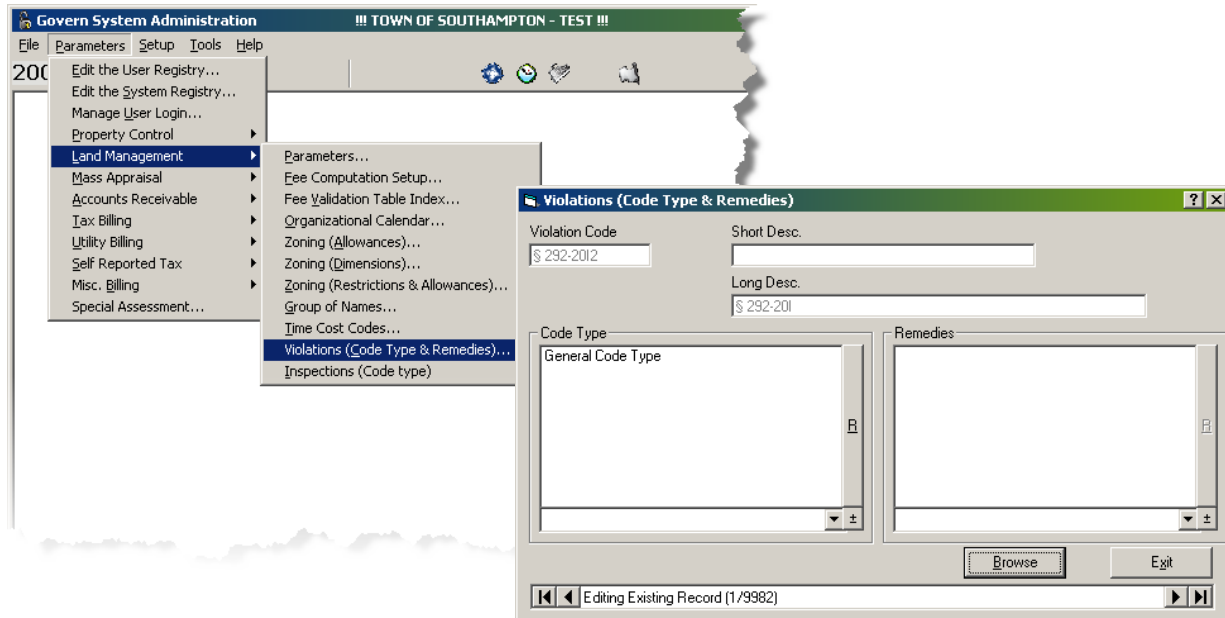


## Define Violations / Remedies for Offences

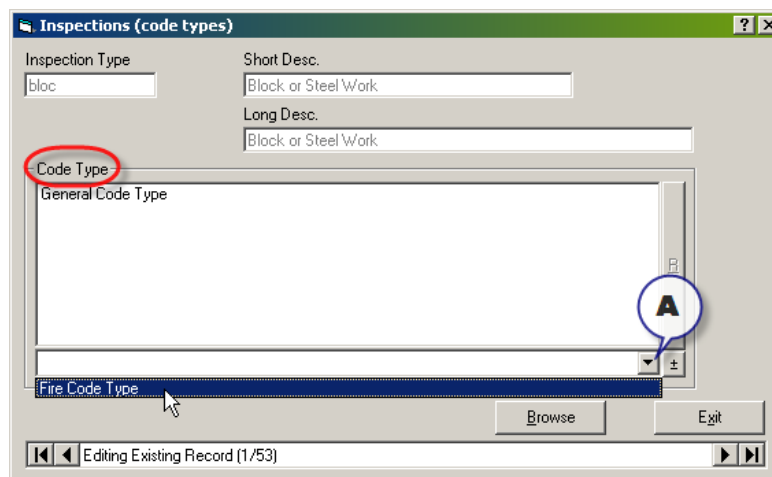
When *Offenses / Violations* are discovered during an inspection, you are able to link them through a functionality that is similar to that of Code violations. In Admin, you will need to first define *Violations / Remedies* for the offences.

To define *Violations / Remedies* for offences in *Govern Admin*:

1. Select *Parameters > Land Management > Violations (Code Type & Remedies)*....



2. Follow the steps to create any required Offences / Violations.
3. Select *Parameters > Land Management > Inspections (Code Type)*.
4. In the *Inspections (Code Type)* form you can select an existing inspection type or create a new one; in the *Code Type* group, select the code type that will be associated with the inspection type.



In *Govern for Windows* when these inspection types are selected, the **Offenses** tab will display the associated offense types.

## Defining Inspection Territories

An *Inspection Territory* is a user-defined classification for organizing and scheduling inspections, according to geographic area — or other criteria defined by the organization. They are used to facilitate the scheduler's and inspector's tasks — and cut back on travel time.

**Note:** The *Inspection Territory* is a required field on all *Inspection Calendars* and *Schedules*.

### How to Define Inspection Territories

To define Inspection Territories, you need to complete the following steps:

1. Create organization-wide inspection Territory Codes and save them to the Inspection Territory validation table VT\_USR\_INSPTR.
2. Assign an Inspection Territory to each parcel.
3. Create *Organization*, *Department* and *Inspector's Schedules* for each territory. See *Defining Inspection Calendars and Schedules* on page 29.

### Creating Inspection Territories

To create *Inspection Territories*:

1. Launch *Govern Admin*.
2. Select *Setup* > **Validation Table** to open the *Validation Table Header* form.
3. Click **Browse** and select the Inspection Territories table, **inspter**.
4. Click **Codes**.
5. Enter a code, short description and long description, for the territory.
6. Select a jurisdiction, if applicable.



- Click **Save**.

**Note:** The VT\_USR\_INSPTR table includes the inspection territory code, \*All. This is used for an inspector who needs to perform inspections in all areas. It is also used to create a default organizational or departmental calendar that can be used for any territory

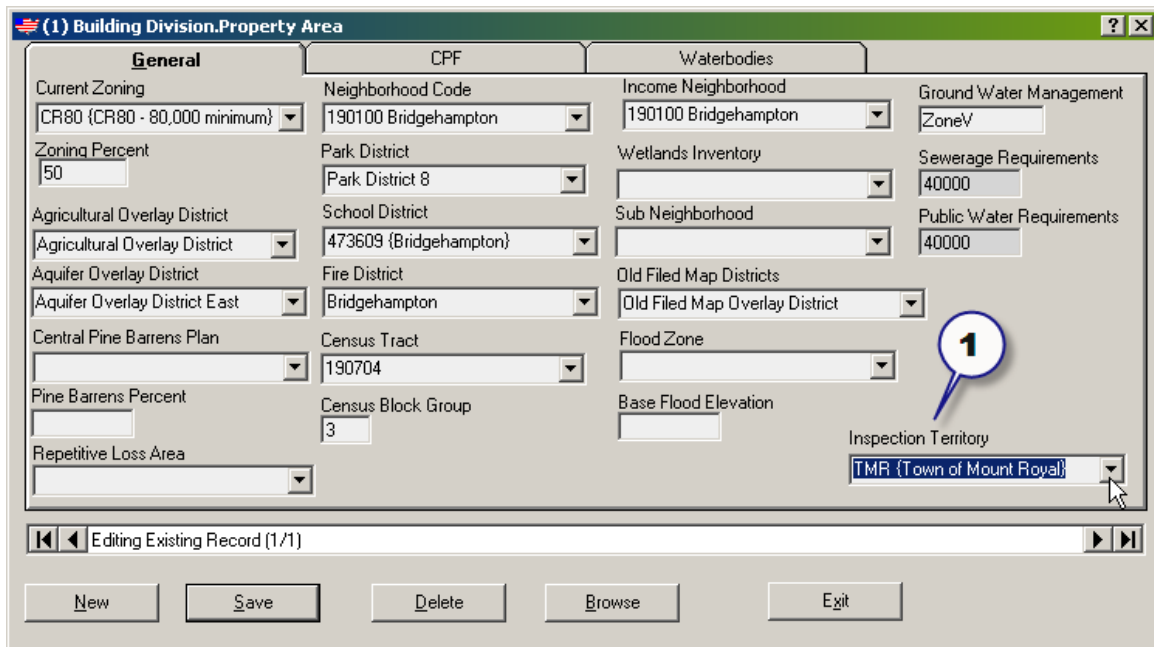
- Repeat the procedure for each territory.

### Assigning Inspection Territories for the Organization

You need to open the Parcel Area function for each parcel record and select the *Inspection Territory* code, for the organization.

To select the inspection territory for the parcel:

- Launch Govern and select the parcel record.
- Open the *Property Area* function.



The screenshot shows the 'Building Division.Property Area' window. The 'General' tab is selected. The 'Inspection Territory' dropdown menu is highlighted with a red circle and the number 1. The dropdown menu shows 'TMR (Town of Mount Royal)'. The status bar at the bottom indicates 'Editing Existing Record (1/1)' and includes buttons for 'New', 'Save', 'Delete', 'Browse', and 'Exit'.

- Select a code from the Inspection Territory drop-down list.
- Click **Save**.

*Refer to the Property Control guide for further details.*

## Defining Inspection Territories by Department

By default Inspection Territories are assigned by organizations, i.e. all departments were using the same data and validation tables. With Inspection Territories assigned by department, you are now able to say that within an organization, the Fire Department can have a designated territory, while another could be assigned to the Public Works Department. Each new departmental territory would now have its own data and validation tables. As a result, when each respective department views their territories, they will only see the ones assigned to them.

To define *Inspection Territories* by department, there are four (4) stages to complete, note that stage 3 and 4 are closely linked:

### STAGE 1: Creating a field

In *Govern for Windows*, create a new field that will list your options for territories; this field is created in the PC\_AREA table:

1. Open a record and select the **Property Area** function from the *Side Navigation Bar (SNB)*
2. Select *Setup > Object Dragging Mode*, to switch to object dragging mode.
3. Select *Setup > New Database Columns...*
4. Specify *Column Name*, *Description*, and *Column Label*.
5. For *User Interface Type*, ensure that you select **Combo Box**
6. Re-position the field and label on the form.
7. Select *Setup > Cancel Object Dragging Mode*

Your new field will be created.

### STAGE 2: Attaching a Validation Table to the field

Attach a validation table to the field...

1. Select *Setup > Field Setup Mode*
2. Click in your newly created field to display the *Field Setup* window.
3. Click **Table** to display the *Validation Table Header*.

4. In the *Validation Table Header* window, click **New**
5. Enter a **Table Name** (the name that appears on the list) and a **Description** in the fields.
6. Click **Codes** to display the *Validation Table* form
7. Complete the *Code*, *Short Desc.* (the name that appears in the combo box), *Long Desc.*, and optional *Full Desc.* fields.
8. Click **Save** to save your codes and **Exit** to return to your previous screen.
9. Once again click **Save** and **Exit** to return to the *Field Setup* form.
10. In the *Validation Type* group click *User Table*.
11. A list of tables will appear on the right hand side (*RHS*) of the form; select your code from this list.
12. Click **OK**.
13. Select *Setup* > **Cancel Field Setup Mode**.

The new field will now have your territories available as a selection in the drop-down menu. Exit from *Govern for Windows* and launch *Govern Admin* to complete the next stage.

### STAGE 3: Linking the Territories to Departments

You will now link the newly defined territories to departments. In *Govern Admin*...

1. Select *Parameters* > *Land Management* > **Parameters**
2. In the *Land Management Parameters* forms, choose the department from the *Departments* group.
3. Select *Maintain* > **Department** to display the *Permit Parameters* form.
4. If not selected, click the **General** tab.
5. Under the *Inspection Territory* field, select the territory that is to be associated with the department.
6. Click **Save** to save the selection and return to the *Land Management Parameters* form.

### STAGE 4: Set up an Inspector's Schedule

The final stage is to set up the Inspector's schedule...

7. Again with the department in question highlighted, select *Maintain* > **Inspector's Schedule**, to display the *Inspector's Schedules* form.
8. Click **New** to setup an inspector complete the fields and click **Search**.
9. Double-click on a name from the *Browse* screen.
10. Pick a territory from the *Territory Code* drop-down menu; to display the calendar select **Overwrite the Calendar**.

For instructions on setting up an inspection calendar, see the *Defining Inspection Calendars and Schedules* on page 29.

# Defining Inspection Calendars and Schedules



## Overview

Govern provides three forms for defining default inspection scheduling parameters, at each of the following levels:

- Organizational, on the Organizational Calendar form. See *Creating an Organizational Calendar* on page 30.
- Departmental, on the Departmental Calendar form. See *Creating a Departmental Calendar* on page 33.
- Individual Inspector, on the Inspector's Schedule form. See *Creating an Inspector's Schedule* on page 34.

The *Inspector's Schedule* is a required form. Before you can assign an inspector to an inspection, you need to create an Inspector's schedule, defining the inspector's availability, territory and inspection types.

The *Organizational and Departmental Calendars* are used to define common parameters for scheduling inspections, within an organization or department, for example, the days and times that inspections are performed.

The *Organizational Calendar*, for each territory, is the default calendar. It is used if a specific calendar has not been created for a department. In addition, it serves as the template. When you create a Departmental Calendar or Inspector's Schedule, the settings from the Organizational Calendar are displayed on the form. You just need to make modifications to these settings and save the new calendar or schedule.

The Inspector's Schedule overrides the calendars defined for the department and organization. Similarly, the Departmental Calendar overrides the calendar defined for the organization.

All inspection calendars and schedules define the:

- Days that inspections can be performed; such as, Monday to Friday
- Starting and ending times for performing inspections
- Number of inspections to be performed each day
- Minimum duration of an inspection

In addition, the Inspector's Schedule defines the following:

- Name and Address records for the inspectors
- Inspection Types to be performed by the inspector
- Inspector Unavailability, during normally scheduled days

All inspection calendars and schedules are created by inspection territory.

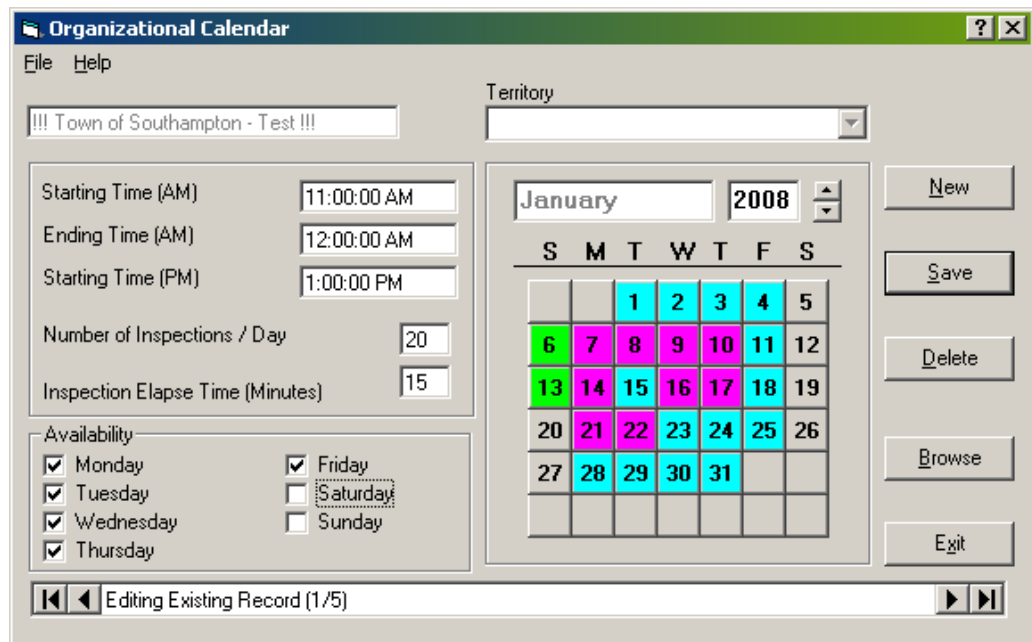
## Creating an Organizational Calendar

The *Organizational Calendar* is used for setting the default inspection scheduling parameters, for each territory.

**Note:** You can create only one *Organizational Calendar* per territory.

To create an Organizational Calendar:

1. In Govern Admin, select *Parameters > Land Management > Organizational Calendar*.



**Organizational Calendar**

File Help

Territory: [!!! Town of Southampton - Test !!!]

Starting Time (AM): [11:00:00 AM]  
 Ending Time (AM): [12:00:00 AM]  
 Starting Time (PM): [1:00:00 PM]  
 Number of Inspections / Day: [20]  
 Inspection Elapse Time (Minutes): [15]

Availability:

<input checked="" type="checkbox"/> Monday	<input checked="" type="checkbox"/> Friday
<input checked="" type="checkbox"/> Tuesday	<input type="checkbox"/> Saturday
<input checked="" type="checkbox"/> Wednesday	<input type="checkbox"/> Sunday
<input checked="" type="checkbox"/> Thursday	

Calendar: January 2008

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Buttons: New, Save, Delete, Browse, Exit

Status: Editing Existing Record (1/5)

2. Click **New** on the **Organizational Calendar** form.

## Defining Inspection Calendars and Schedules

3. Select a territory from the drop-down list (Table: VT\_USR\_INSPTER).

**Tip:** To begin, create an Organizational Calendar, with *\*All* selected as the territory. This becomes the template for all other inspection calendars and schedules.

4. Click Save to enable the other fields and complete the form as follows:

**Setting up Inspection Times:** Enter the times that inspectors start and stop performing inspections, each morning and afternoon, in the **Starting Time (AM)**, **Ending Time (AM)** and **Starting Time (PM)** fields.

When entering times, use one of the following formats:

Enter the hour and minutes separated by a colon, using the 24 hour clock, for example, **8:00** or **13:00** or

Enter the hour, minutes and seconds, separated by colons and followed by AM or PM. Do not enter a space between the time and the AM or PM; i.e., enter **8:00:00AM** or **1:00:00PM**, not 8:00:00 AM or 1:00:00 PM.

The time blocks or Time Units are displayed on the Inspection Scheduling form. The first and last time block correspond to the times entered in these fields.

11:00 a	12:00 p	1:00 p	2:00 p
11:05 a	12:05 p	1:05 p	2:05 p
11:10 a	12:10 p	1:10 p	2:10 p
11:15 a	12:15 p	1:15 p	2:15 p
11:20 a	12:20 p	1:20 p	2:20 p
11:25 a	12:25 p	1:25 p	2:25 p
11:30 a	12:30 p	1:30 p	2:30 p
11:35 a	12:35 p	1:35 p	2:35 p
11:40 a	12:40 p	1:40 p	2:40 p
11:45 a	12:45 p	1:45 p	2:45 p
11:50 a	12:50 p	1:50 p	2:50 p
11:55 a	12:55 p	1:55 p	2:55 p

You can schedule an inspection for:

- an exact starting and ending time
- the morning (AM) or afternoon (PM)

- an undefined time during the selected day (Anytime).

**Note:** Inspection times include travel time.

**Number of Inspections / Day:** Enter the maximum number of inspections that can be scheduled in a day.

**Inspection Elapse Time:** Enter the minimum amount of time (in minutes) that it takes to perform an inspection.




**Note:** The Inspection Elapse Time must be a multiple of the **Inspection Units Duration** set on the Land Management Parameters in Govern Admin.


You cannot schedule an inspection or block time on an Inspector's Schedule that is less than the Inspection Elapse Time.

**Availability:** On the calendar, select the days that inspections can be performed. The background color for these days changes to cyan.

## Modifying the Calendar

To remove a day scheduled for inspections, select the day on the calendar. The background color changes from cyan to magenta. To add an unscheduled day, select the day on the calendar; the color changes to green.

Color		Description
	Cyan	Day selected for scheduling inspections.
	Magenta	Previously-selected day removed from the schedule.
	Green	Unscheduled day added to the Inspection Schedule.

**Month / Year:** By default, the current month and year are displayed. Use the up / down arrows  to change these parameters, if required.



### Creating a Departmental Calendar

The Departmental Calendars are used for defining the default inspection scheduling parameters for the department.

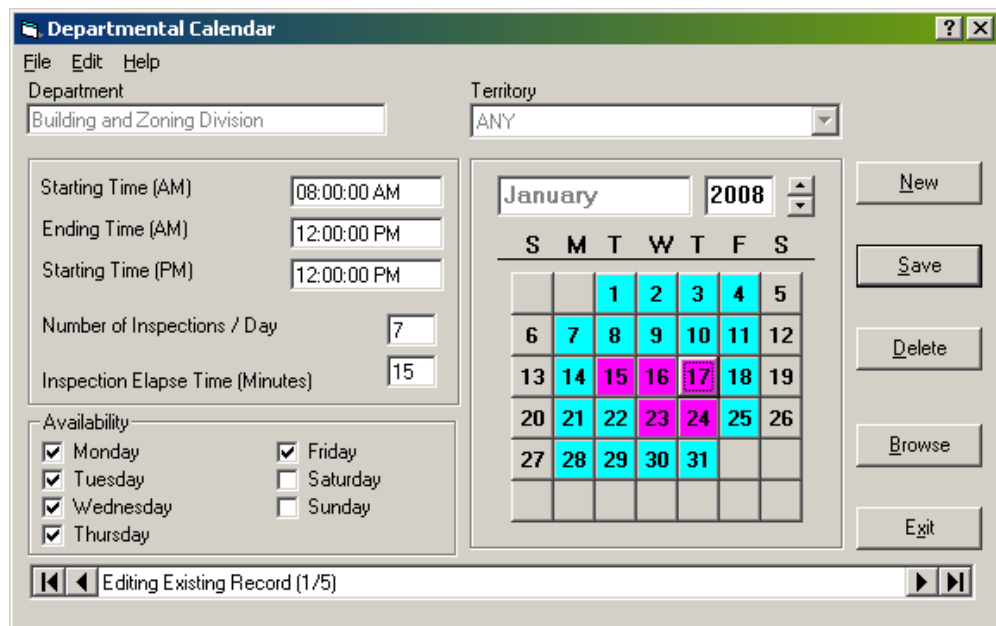
You can create only one Department Calendar per inspection territory, for each department.

**Note:** You can create only one *Department Calendar* per inspection territory, within each department.

**Note:** If a *Department Calendar* has not been created for a specific territory or department, the *Organizational Calendar* is used.

To create a Departmental Calendar:

1. In Govern Admin, select *Parameters > Land Management > Parameters*.
2. Highlight the department on the *Land Management Parameters* form and select *Maintain > Department's Calendar*.



**Note:** The **Department's Calendar** option is enabled only if **Use Department's Calendar** is selected on the *Department Setup* form.

3. Click New and select a territory from the drop-down list box.

4. Click **Save**. If an *Organizational Calendar* has been created for the selected territory, the parameters from this calendar are displayed.
5. Modify these parameters, as described in *Creating an Organizational Calendar on page 30*.
6. Click **Save**.

## Creating an Inspector's Schedule

The *Inspector's Schedule* form is similar to the *Organizational and Departmental Calendar* forms. You can define the same parameters, such as inspection territory, inspection times and availability. In addition, you can:

- Assign inspection types to an inspector
- Create name and address records for new inspectors
- Modify existing name and address records
- Block off specific times to indicate the inspector is unavailable during a time normally scheduled for inspections
- Classify an inspector as inactive

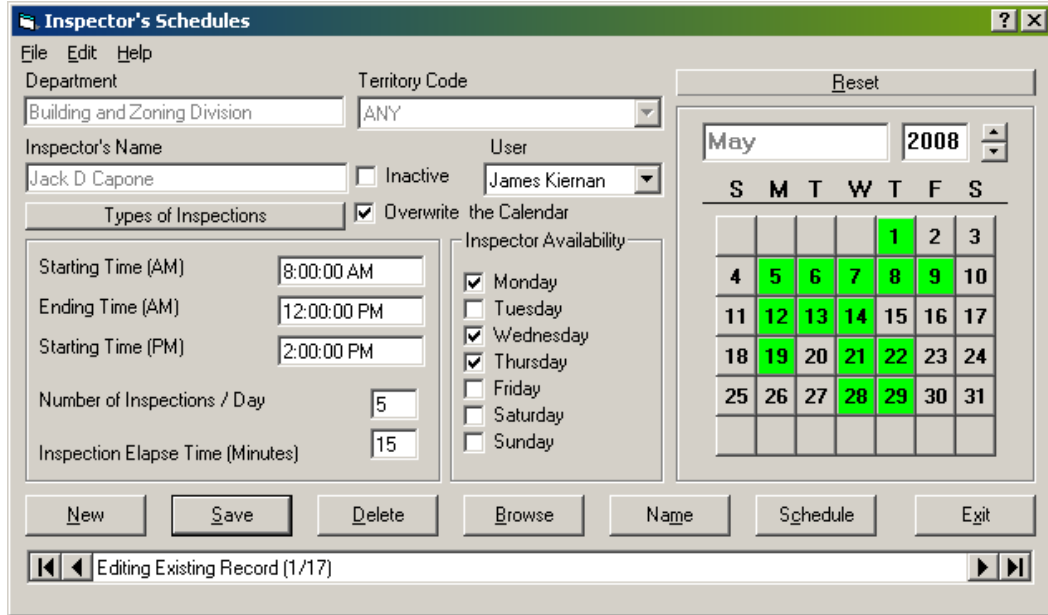
Inspectors' Schedules are created by department and by territory, for each inspector. See *Creating an Organizational Calendar on page 30* and *Creating a Departmental Calendar on page 33* for details.

**Tip:** Before creating the Inspectors' Schedules and Departmental Calendars, create an Organizational Calendar for the territory, \*All. This is used as the template and displayed on the form, when you create an Inspector's Schedule. Then, you can just make the modifications, required for the inspector, and save a new schedule.

To create an *Inspector's Schedule*:

1. In *Govern Admin*, select *Parameters > Land Management > Parameters*.
2. Highlight the department on the *Land Management Parameters* form and select *Maintain > Inspector's Schedule*.

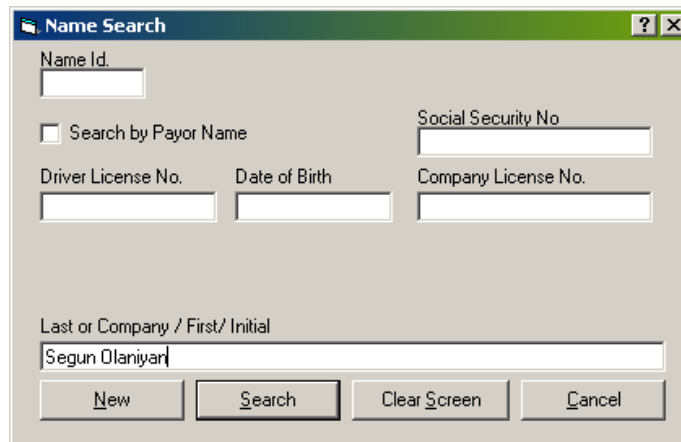
## Defining Inspection Calendars and Schedules



The **Inspector's Schedules** window contains the following fields and controls:

- File Edit Help** menu bar.
- Department**: Building and Zoning Division
- Territory Code**: ANY
- Inspector's Name**: Jack D Capone
- User**: James Kiernan
- Inactive**: ☐
- Overwrite the Calendar**: ☒
- Types of Inspections**: (dropdown menu)
- Starting Time (AM)**: 8:00:00 AM
- Ending Time (AM)**: 12:00:00 PM
- Starting Time (PM)**: 2:00:00 PM
- Number of Inspections / Day**: 5
- Inspection Elapse Time (Minutes)**: 15
- Inspector Availability**:
  - ☒ Monday
  - ☐ Tuesday
  - ☒ Wednesday
  - ☒ Thursday
  - ☐ Friday
  - ☐ Saturday
  - ☐ Sunday
- Calendar**: A calendar for May 2008. The days 1 through 31 are shown in a grid. The days 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, and 31 are all highlighted in green.
- Buttons**: New, Save, Delete, Browse, Name, Schedule, Exit.
- Status Bar**: Editing Existing Record (1/17)

- Click **New**. The **Name Search** screen appears. From this screen, you can search for and select an existing record or create a new name and address record for an inspector.



The **Name Search** window contains the following fields and controls:

- Name Id.**: (text field)
- Search by Payor Name**: ☐
- Social Security No.**: (text field)
- Driver License No.**: (text field)
- Date of Birth**: (text field)
- Company License No.**: (text field)
- Last or Company / First/ Initial**: Segun Olaniyan
- Buttons**: New, Search, Clear Screen, Cancel.

- To select an existing name and address record, enter the name or address criteria and click **Search**. Then, highlight the inspector on the Browsing screen and click **Select**. Refer to the User section of the Property Control guide for more information on this type of search.
- To create a new name and address record, click **New** and follow the procedure in *Creating a Name and Address Record for an Inspector on page 35*.

4. Select the user ID for the inspector, from the **User** drop-down list, if applicable. This is used in Outlook Scheduling and for reports. A user ID is present, only if a Govern account has been created for the inspector, on the User Maintenance form in Govern Admin.
5. Select a territory, from the **Territory** drop-down list (Table: VT\_USR\_INSPTR).
6. Click **Save** to enable the other fields. The default calendar for the territory, either an *Organizational or Departmental Calendar*, is displayed.
7. Select **Overwrite the Calendar** to define a schedule for the selected inspector. Otherwise, the departmental or organizational calendar created for the territory is used.
8. Modify these parameters, as described in *Creating an Organizational Calendar on page 24*.
9. Click **Save**.

## Assigning Inspection Types to an Inspector

Use the Types of Inspection screen to assign inspection types to the selected inspector. Inspection types are used in Inspection Scheduling, as follows:

### Manually Scheduled Inspections

**In Govern:** All the inspection types created by the department are displayed on the Inspections function. The types assigned to the selected inspector are displayed in black, the others in red. The scheduler can, however, select any type for the inspection.

**Mobile Inspection and DeskTop Inspection components:** The Scheduler selects Inspection Types from the **Add Types** drop-down list. This list includes all the inspection types for the department.

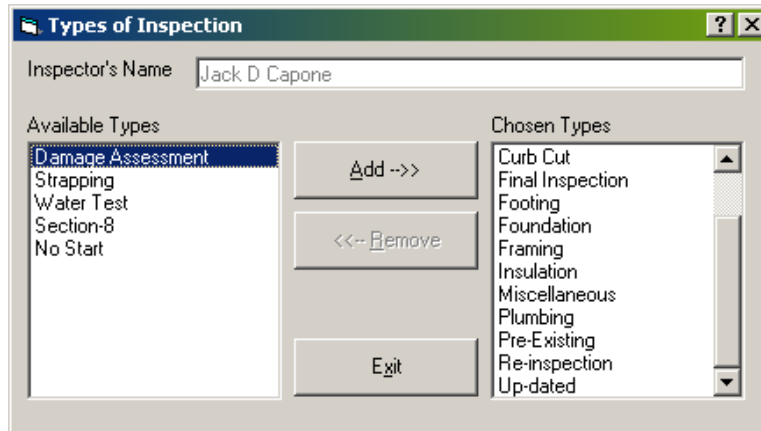
### Automatically Scheduled Inspection

An administrator can select the inspection types, when defining an inspection that is automatically-generated from an activity, in Govern Admin, or the inspection types can be selected in Govern when the activity is run.

If the inspection types are pre-defined, the inspector is assigned, according to inspection type, only if the Automatically Assign Inspector by Inspection Type option is selected on the Permit Parameters form. *See Automatically Assign an Inspector on page 68.*

To select Inspection Types for the inspector:

1. Click **Types of Inspection**.



The *Types of Inspection* screen displays the name of the inspector, selected on the *Inspector's Schedule* form.

The Available Inspection Types, as defined on the Inspection Codes form are listed on the left pane and the Chosen Types, selected for the inspector are listed on the right. See *Defining Inspection Types or Codes* on page 17.

2. Highlight the inspection type or types that you want to select for the inspector, in the **Available Types** list.
3. Click **Add - >>**.
4. Click **Exit**.

To remove one or more of the inspection types selected for an inspector:

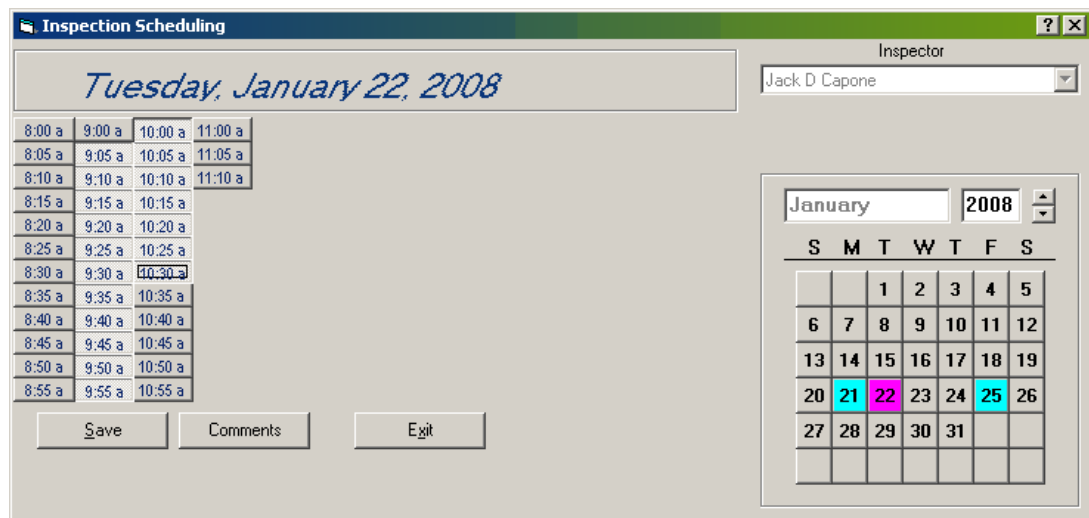
1. Highlight the types you want to remove, in the **Chosen Types** list.
2. Click **<< - Remove**.
3. Click **Exit**.

## Blocking Inspection Times

If an inspector will be unavailable during a period normally scheduled for inspections, you can open the Inspection Scheduling screen and block off the time period.

To block off a time period:

1. Launch *Govern Admin* and open the *Inspector's Schedule* for the inspector.
2. Select the day, on which you want to block off the time, on the calendar.
3. Select **Schedule**.




The Inspections Scheduling form displays blocks to represent the times during which inspections can be scheduled.




4. Select the blocks for the period the inspector is unavailable.

**Note:** This period must be equal to or greater than the **Inspection Elapse Time** parameter set on the *Inspector's Schedule* form, or on the default calendar.


The blocks are coded as follows

Color	Key	Description
	Navy	Selected Time available for Inspection scheduling

## Defining Inspection Calendars and Schedules

Color		Key	Description
	Navy	Selected	Inspection scheduled for the selected time.
	Gray	Selected with Outlook logo	Time unavailable: blocked through the <b>Block Time</b> feature.
	Gray	Selected with Outlook logo	Time unavailable: blocked through <i>Outlook</i> .

- Click **Save**, after selecting the time blocks. The Comments screen appears.



- Enter a comment, such as the reason blocking the time and click **OK**.

**Note:** You can access the same screen to block time from Govern. See *Blocking Time for an Inspector* on page 82.

To view comments for all scheduled times, including inspections and blocked time:

- Click **Comments**.

## Inspections



To remove blocked time:

1. Select any of the fields for the item you want to remove.
2. Click **Delete**.
3. Click **Schedule** to return to the Inspector's Scheduling form.

## Outlook Scheduling

If Outlook Scheduling is enabled, blocked time is entered on the inspector's Outlook Calendar, as well as the Inspection Scheduling form in Govern. See *Blocking Inspection Times on page 38 for details*.

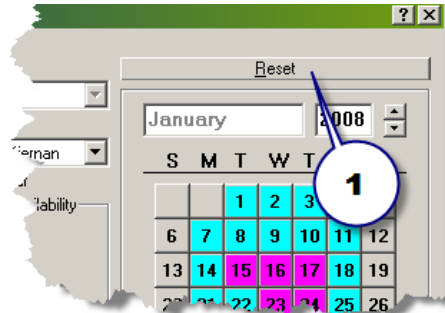
## Classifying an Inspector as Inactive

Select the **Inactive** option to classify the inspector as inactive. With this classification, you can maintain existing records but you cannot schedule any new inspections for the inspector.



### Resetting the Calendar

Click **Reset** to reinstate the default calendar; i.e., the *Departmental or Organizational Calendar*.



### Creating a Name and Address Record for an Inspector

Before you can create an Inspector's Schedule, you need a name and address record for the inspector.

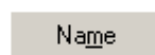
To create a name and address record:

1. Click **New** on the Inspector's Schedule form. This launches the Name Search screen.
2. Click New on the Name Search form. This launches the Name & Address Maintenance function. Refer to the Property Control guide for details.

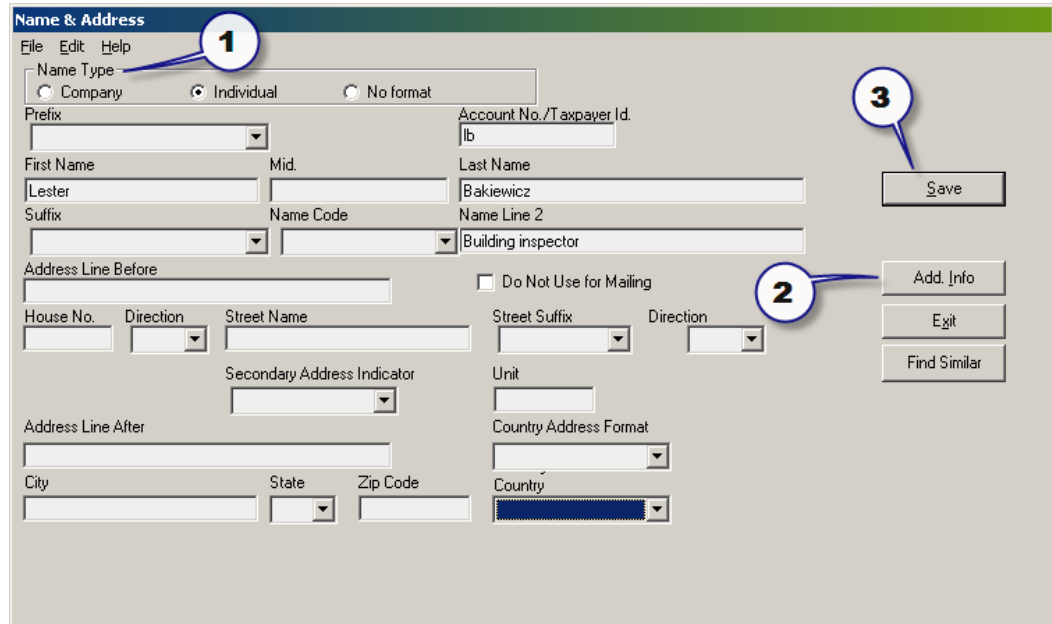
### Modifying a Name and Address Record

To modify a Name and Address record:

1. Click **Name**, on the Inspector's Schedule form, to open the Name & Address function.
2. Modify the existing address information. *Refer to the Property Control guide for details.*



3. Select **Individual**, **Company** or **No Format**, as applicable.

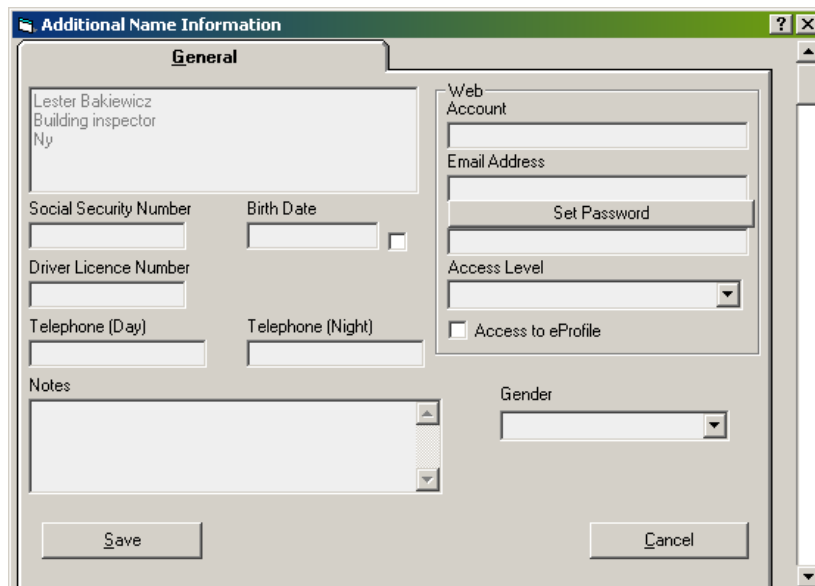


The **Name & Address** form contains the following fields and controls:

- Callout 1:** Points to the **Name Type** radio buttons: **Company**, **Individual** (selected), and **No format**.
- Callout 2:** Points to the **Add Info** button.
- Callout 3:** Points to the **Save** button.
- Fields:**
  - Prefix:** Dropdown menu.
  - First Name:** Text field (contains "Lester").
  - Mid:** Text field.
  - Last Name:** Text field (contains "Bakiewicz").
  - Suffix:** Dropdown menu.
  - Name Code:** Dropdown menu.
  - Name Line 2:** Text field (contains "Building inspector").
  - Account No./Taxpayer Id:** Text field (contains "lb").
  - Address Line Before:** Text field.
  - House No.:** Text field.
  - Direction:** Dropdown menu.
  - Street Name:** Text field.
  - Street Suffix:** Dropdown menu.
  - Direction:** Dropdown menu.
  - Secondary Address Indicator:** Dropdown menu.
  - Unit:** Text field.
  - Address Line After:** Text field.
  - Country Address Format:** Dropdown menu.
  - City:** Text field.
  - State:** Dropdown menu.
  - Zip Code:** Text field.
  - Country:** Dropdown menu.
- Buttons:** **Save**, **Add Info**, **Exit**, and **Find Similar**.
- Checkboxes:** **Do Not Use for Mailing** (unchecked).

4. Fill in the form, as described in the *Property Control* guide and click **Save**.
5. Click **Add Info** to enter additional details and click **Save**:

## Additional Information for an Individual Name and Address Record



The **Additional Name Information** form has the following sections and fields:

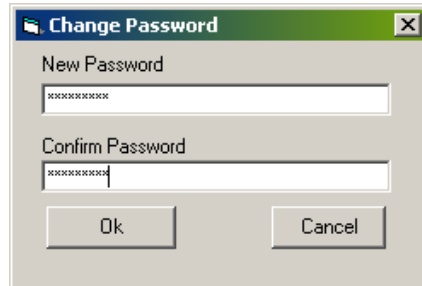
- General Section:**
  - Summary:** Lester Bakiewicz, Building inspector, Ny.
  - Social Security Number:** Text field.
  - Birth Date:** Text field with a calendar icon.
  - Driver Licence Number:** Text field.
  - Telephone (Day):** Text field.
  - Telephone (Night):** Text field.
  - Notes:** Text area.
  - Gender:** Dropdown menu.
- Web Account Section:**
  - Web Account:** Text field.
  - Email Address:** Text field.
  - Set Password:** Button.
  - Access Level:** Dropdown menu.
  - Access to eProfile:** Checkbox (unchecked).
- Buttons:** **Save** and **Cancel**.

### Web group

**Account:** Enter the Web account information.

**E-mail Address:** Enter the e-mail address of the individual. This is used for sending e-mail messages on the *Messaging System* function in the *Permits and Inspections* subsystem, as well as, the eComponents.

**Set Password:** Click **Set Password** to set or change the online access password. The password should be a minimum of eight (8) characters with a minimum of one (1) number character and one (1) letter from the alphabet.

A screenshot of a 'Change Password' dialog box. It has a title bar with a green gradient and a close button. Inside, there are two text input fields: 'New Password' and 'Confirm Password'. Both fields contain masked text represented by 'x' characters. At the bottom, there are two buttons: 'Ok' and 'Cancel'.

**Access Level:** Select an access level from the drop-down menu; options are as follows:

- Internet subscriber
- Internet with profile
- Internet without profile
- Intranet admin
- Intranet user

**Access to eProfile:** Select this option to allow access to eProfile.

**Social Security Number:** Enter the Social Security Number of the individual. This number is encrypted in the database.

**Birth Date:** Enter the date of birth of the individual.

**Driver License Number:** Enter the driver license number of the individual. This number is encrypted in the database.

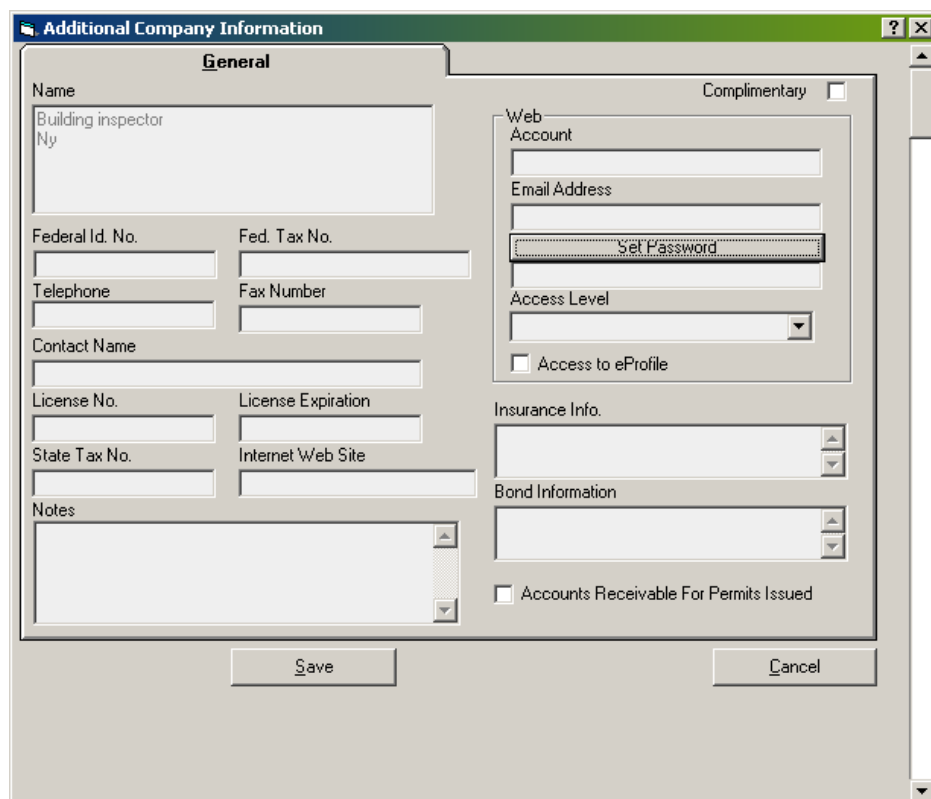
**Telephone (Day):** Enter the daytime, or business, telephone number of the individual.

**Telephone (Night):** Enter the evening, or home, telephone number of the individual.

**Notes:** This field provides unlimited space for notes and comments.

### Additional Information for a Company Name and Address Record

The *Additional Company Information* form is used for adding information, such as Federal ID, Federal Tax Number or a Contact Name to an existing company record.



**Federal ID No.** Enter the Company's Federal ID Number. This field is encrypted in the database.

**Federal Tax No.** Enter the company's federal tax number. This field is encrypted in the database.

**Telephone:** Enter the company's telephone number.

**Fax Number:** Enter the company's fax number.

**Contact Name:** Enter a contact name for the company.

**License No.** Enter the company's license number.

**License Expiration:** Enter the last date the company's license is valid. If the name is linked to a permit, the expiration date is displayed on the **Names** tab of the *Permit Creation* form. *Refer to the Permit & Inspections guide for details.*

**State Tax No.** Enter the company's state tax number.

**Internet Web Site:** Enter the company's Web site address.

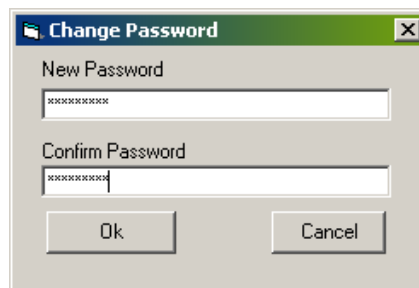
**Notes:** Enter any additional notes or comments.

### Web group

**Account:** Enter the Web account information.

**E-Mail Address:** Enter the company's e-mail address. This is used by the *Messaging* function in the *Permits and Inspections* subsystem.

**Set Password:** Click **Set Password** to set or change the online access password. The password should be a minimum of eight (8) characters with a minimum of one (1) number character and one (1) letter from the alphabet.



A screenshot of a 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password' and a close button. It contains two text input fields: 'New Password' and 'Confirm Password'. Both fields are filled with masked characters (asterisks). Below the fields are two buttons: 'Ok' and 'Cancel'.

## Inspections



**Access Level:** Select and access level from the drop-down menu; options are as follows:

- Internet subscriber
- Internet with profile
- Internet without profile
- Intranet admin
- Intranet user

**Access to eProfile:** Select this option to allow access to eProfile.

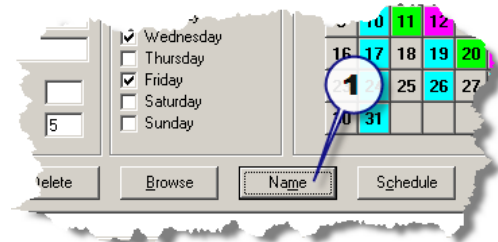
**Insurance Info.** Enter the company's insurance information.

**Bond Information:** Enter the company's *Bond* Information.

**Accounts / Receivable for Permits Issued:** Select this option to create a link to Govern's Accounts Receivable (A/R) subsystem for any permit or license issued to the current company name.

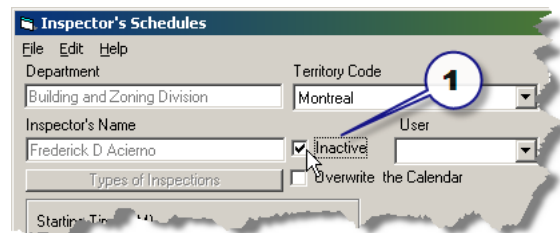
### Modifying a Name and Address Record

Click **Name**, on the *Inspector's Schedule* form, to open the *Name & Address* function and modify the existing address information. Refer to the *Property Control* guide for details.



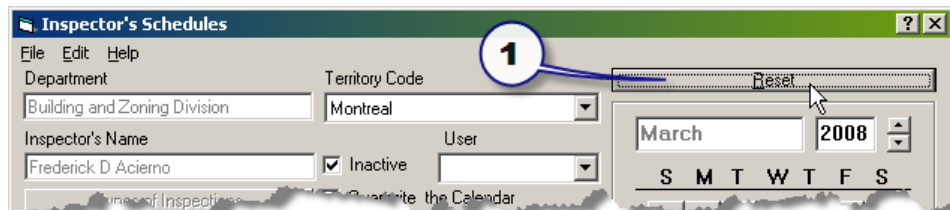
### Classifying an Inspector as Inactive

Select the **Inactive** option to classify the selected inspector as inactive. With this classification, you can maintain data but you cannot schedule inspections for the inspector.



### Resetting the Calendar

Click **Reset** to reinstate the default calendar; i.e., the *Departmental* or *Organizational Calendar*.



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# Integrating Govern with Outlook



## Overview

Use the procedures in this section to integrate Govern for Windows with Microsoft® Outlook®. Then, when a user schedules an inspection in Govern, the inspectors' Outlook Calendars and Task Lists are automatically verified and updated.

Similarly, when inspection scheduling is automatically generated through a System Activity, the Inspector's Outlook Calendar is verified and the inspection is scheduled for the next available time slot. Appointments scheduled through Outlook are automatically displayed as blocked time on the Inspector's Schedule in Govern.

## Prerequisites

- Microsoft® Outlook® 2000, 2003 or XP installed on the Inspectors' and Schedulers' PCs
- Microsoft Exchange Server defined as the mail server on the network
- Govern for Windows™ installed and fully operational on the network, with the Land Management subsystem

## Outlook and Exchange Server Account Setup

To complete the Outlook and Exchange Server Account setup, you need to complete the following steps:

1. Configure *Outlook Profiles* for the inspectors and schedulers, in order to establish connection parameters.
2. Grant access permissions to the schedulers in Outlook.
3. Grant access permissions to the schedulers in Govern.

## Configuring the Profile

To enable Microsoft® Outlook® 2000, 2003 or XP (Outlook) to connect to Microsoft Exchange Server, you need to configure at least one Profile on each Inspector's and Scheduler's PC. Multiple profiles can be created if required.



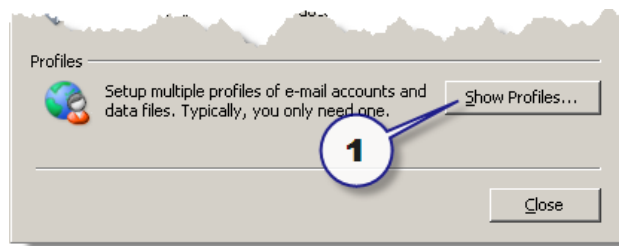
The profile references the user's existing Outlook configuration and can be modified without changing the user's settings.

**Note:** In order for an automatic connection to be made through Govern, the connection parameter in the Outlook Profile must match the Govern User ID.

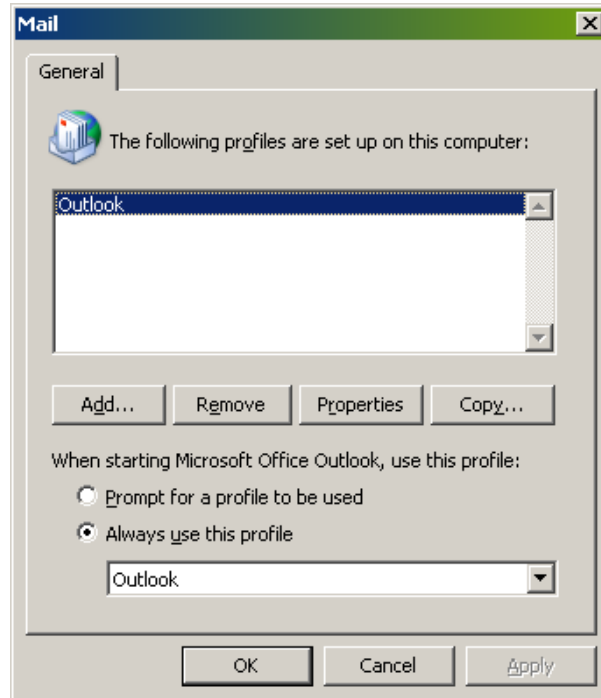
Complete the following procedure on each PC that will be used by a Govern user to schedule inspections or to perform the Automatic Inspection Rescheduling, from Govern Batch Processing.

To create a new Profile containing the Govern user ID:

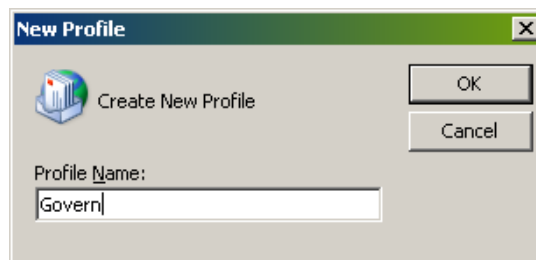
1. In Windows Control Panel, double click on *Mail*
2. Click **Show Profiles**.



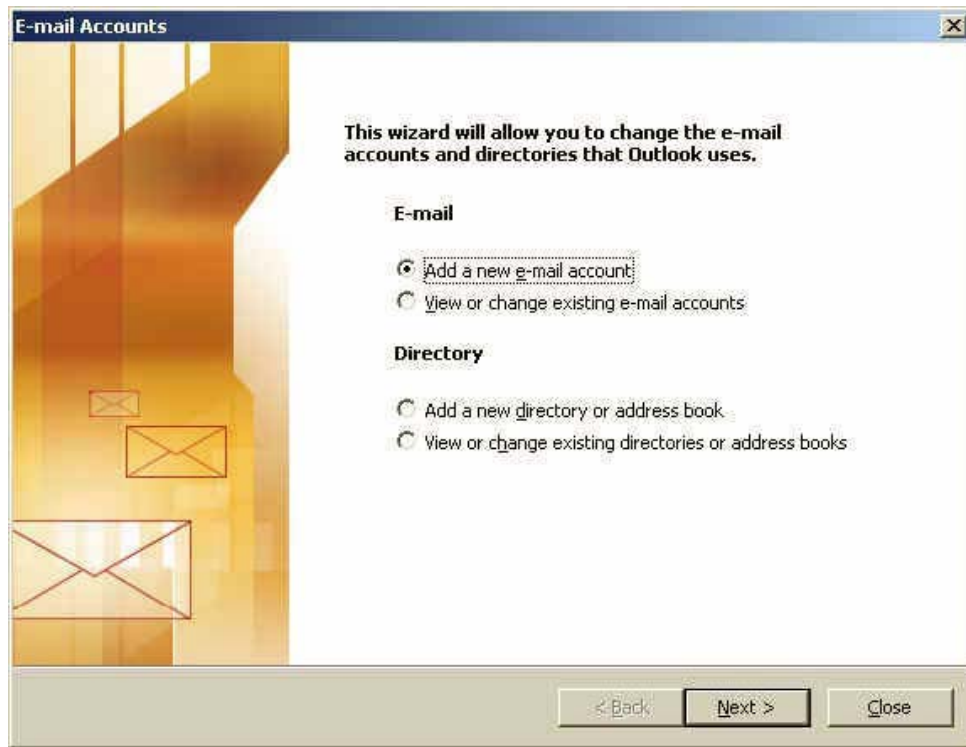
3. In the Mail window, click **Add...**



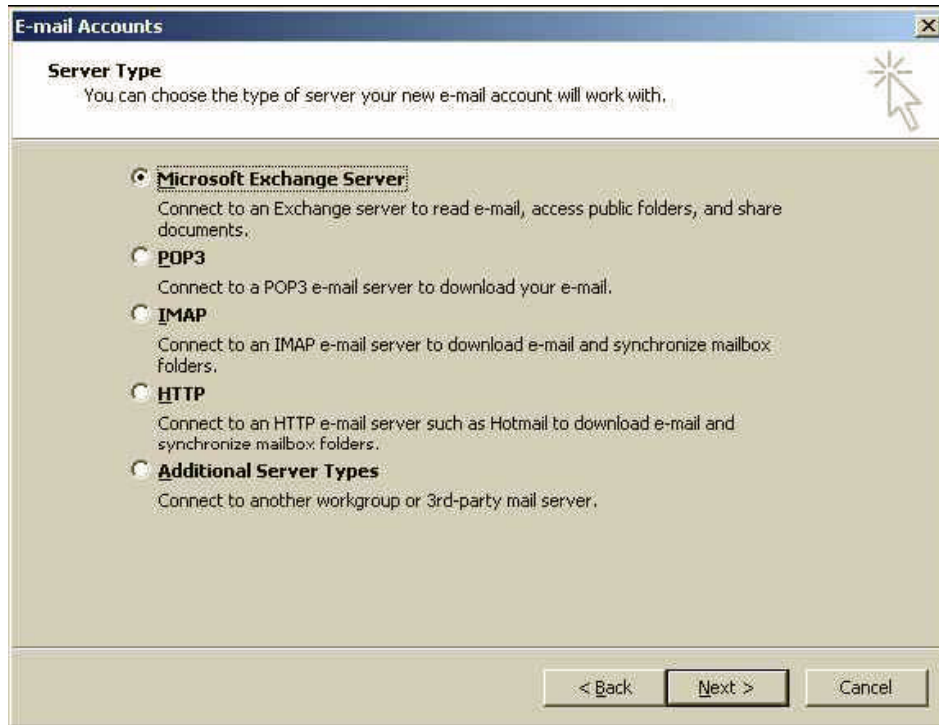
4. In the **New Profile** window, enter the Scheduler's Govern user ID in the Profile Name text box and click **OK**.



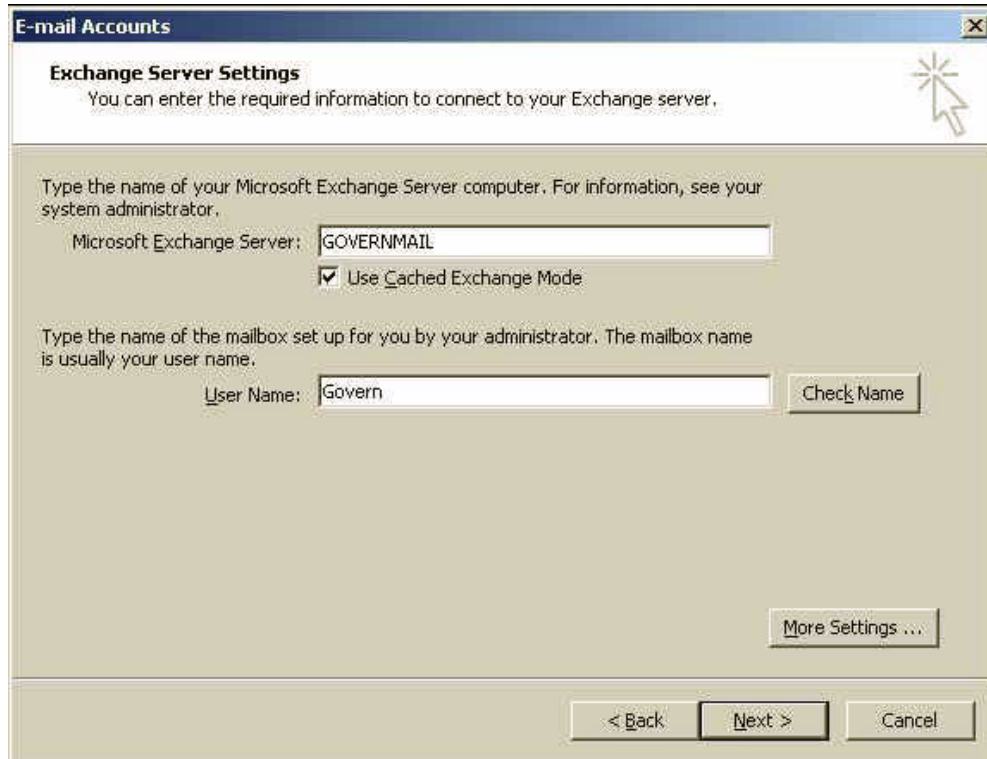
**Note:** The Profile Name must be identical to the Scheduler's Govern User ID. Otherwise, each time the user schedules an inspection, the Outlook Login prompt will appear.



5. Select **Add a new e-mail account** and click **Next >**.



6. Select **Microsoft Exchange Server** and click **Next >**.



**E-mail Accounts**

**Exchange Server Settings**

You can enter the required information to connect to your Exchange server.

Type the name of your Microsoft Exchange Server computer. For information, see your system administrator.

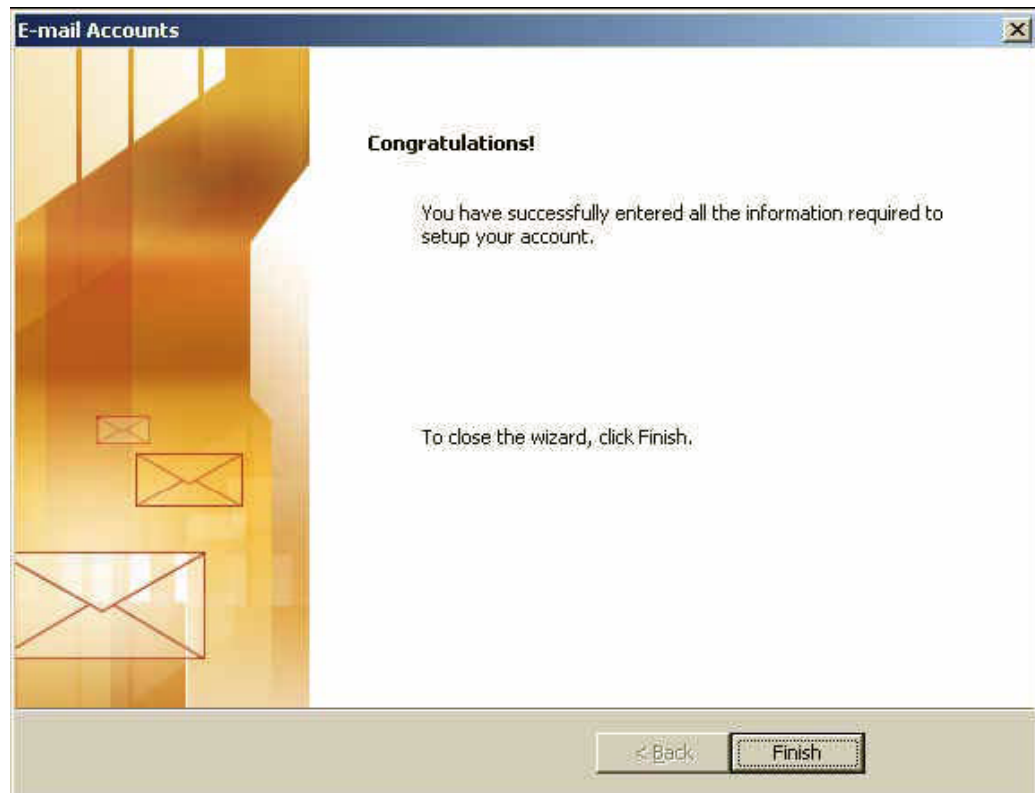
Microsoft Exchange Server:

☒ Use Cached Exchange Mode

Type the name of the mailbox set up for you by your administrator. The mailbox name is usually your user name.

User Name:

7. Enter the name of the *Exchange Server* and the user name of the *Scheduler*. Then click **Next >**.
8. Verify the information on the confirmation message and click **OK**.



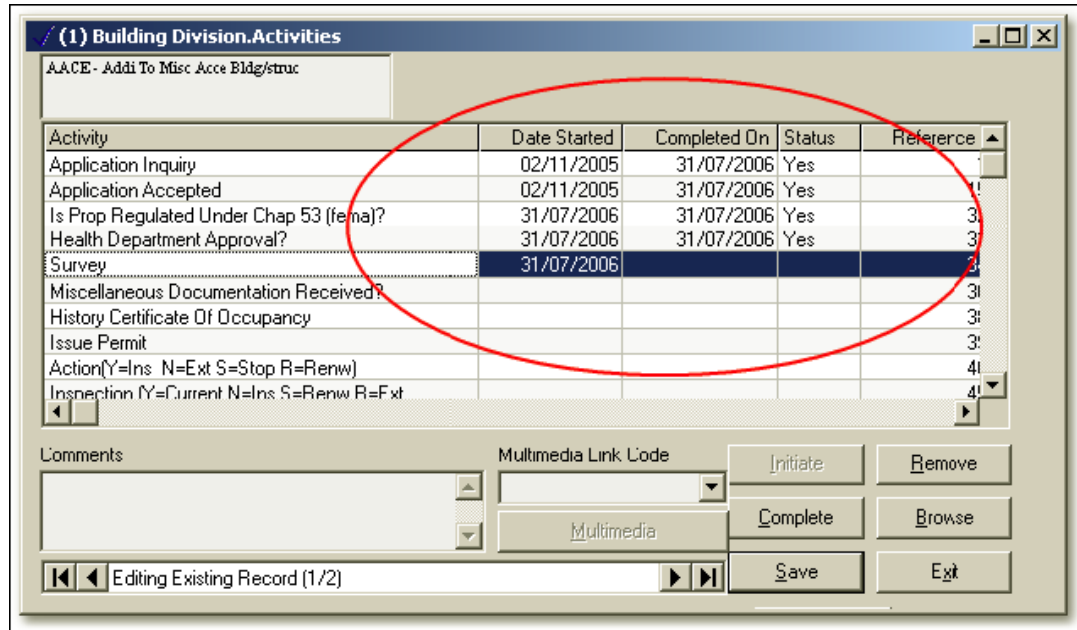
9. Click Finish on the confirmation screen to complete the configuration.
10. Perform this procedure on every Schedulers' PC.

## Granting Permissions to the Schedulers

In order for the inspectors to receive automatic updates in their Outlook Calendars and Tasks, you need to grant access permissions to the users responsible for scheduling the inspections.

In addition, since an inspection can be automatically generated from a System Activity, you need to grant these permissions to all the users who are responsible for initiating activities.

**Tip:** The user ID of the user responsible for uniting the activity is listed in the **UserID** column of the *Activities* function.



**(1) Building Division Activities**

AACE - Addi To Misc Acee Bldg/struc

Activity	Date Started	Completed On	Status	Reference
Application Inquiry	02/11/2005	31/07/2006	Yes	1
Application Accepted	02/11/2005	31/07/2006	Yes	1
Is Prop Regulated Under Chap 53 (fema)?	31/07/2006	31/07/2006	Yes	3
Health Department Approval?	31/07/2006	31/07/2006	Yes	3
Survey	31/07/2006			3
Miscellaneous Documentation Received?				3
History Certificate Of Occupancy				3
Issue Permit				3
Action(Y=Ins N=Ext S=Stop R=Renw)				4
Inspection (Y=Current N=Ins S=Renw R=Ext)				4

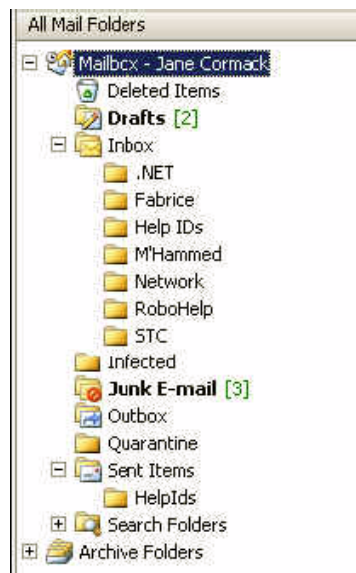
Comments:

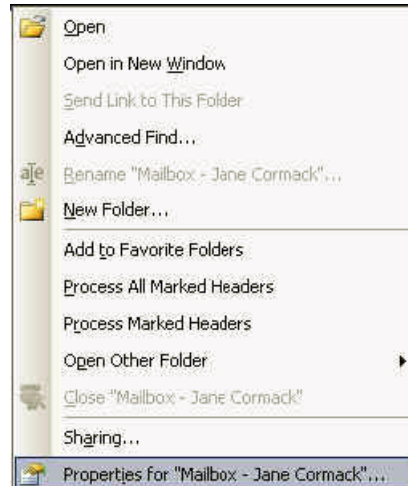
Multimedia Link Code:

Editing Existing Record (1/2)

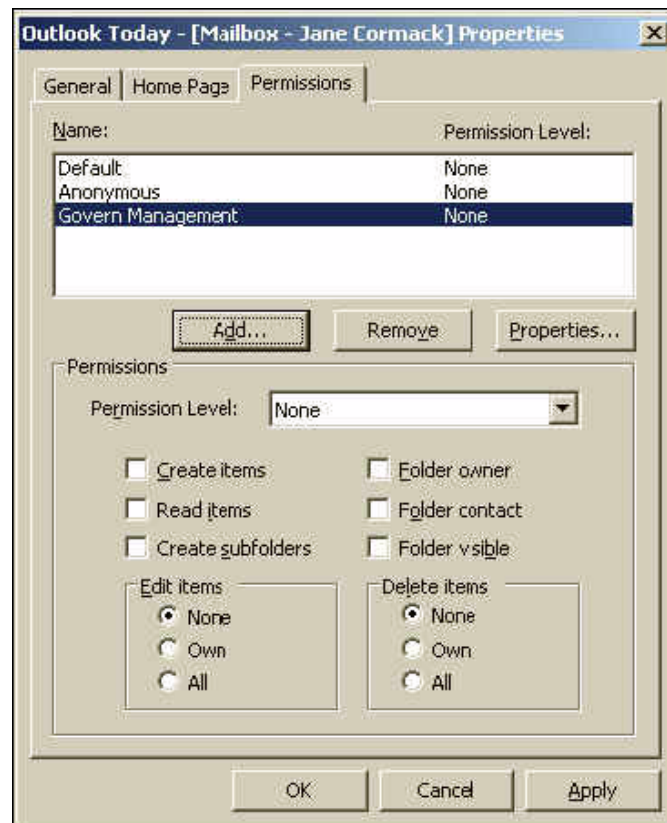
Complete the following procedures, to configure the Outlook Mailbox, Calendar and Tasks on each Inspector's PC.

1. Launch Outlook on the first inspector's PC.
2. Highlight and right-click **Mailbox -**, under **Folder List**.





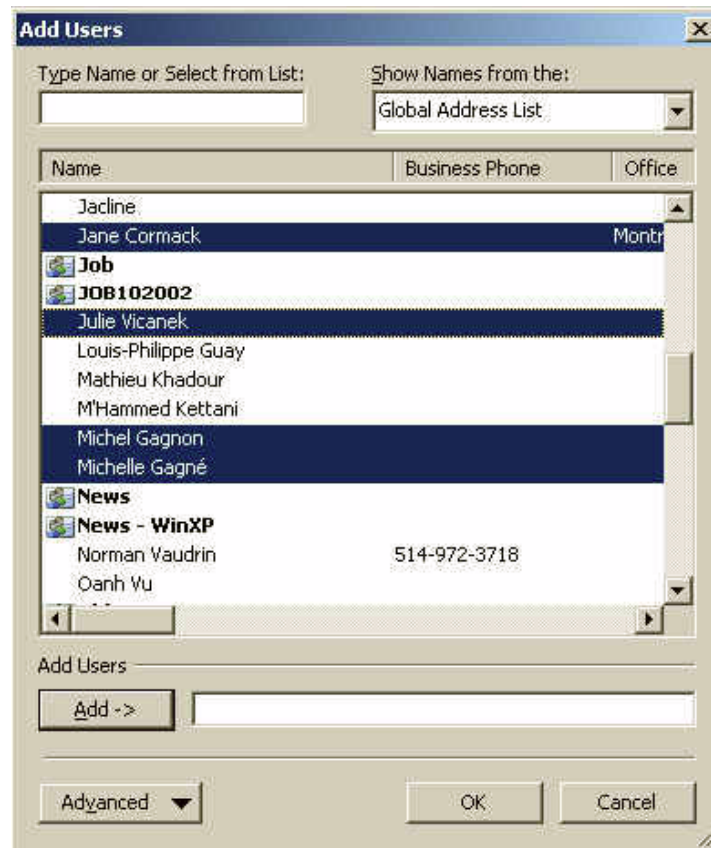
3. Select Properties for “**Mailbox -**”...



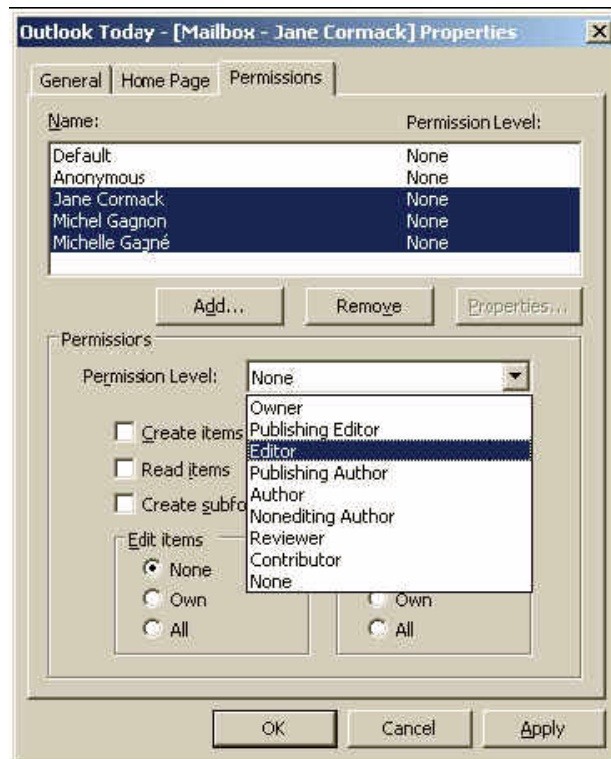
4. Click **Add** to open the *Add Users* form.



5. Highlight the users you want to add.

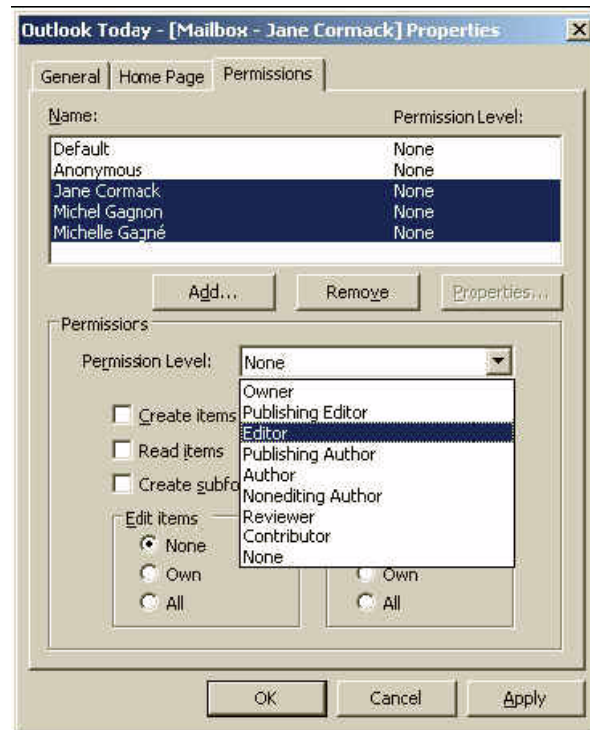


6. Click **Add** to add these users to the **Add Users** text box; then, **OK**.
7. Highlight the users on the *Properties* screen.



8. Select the **Permission Level**.

- For example, select Author. This grants the schedulers the right to view and create items and, also, to modify and delete the items they create. Alternately, select Custom; then, select the specific rights you want to grant.



- Click **OK** on the Properties screen.

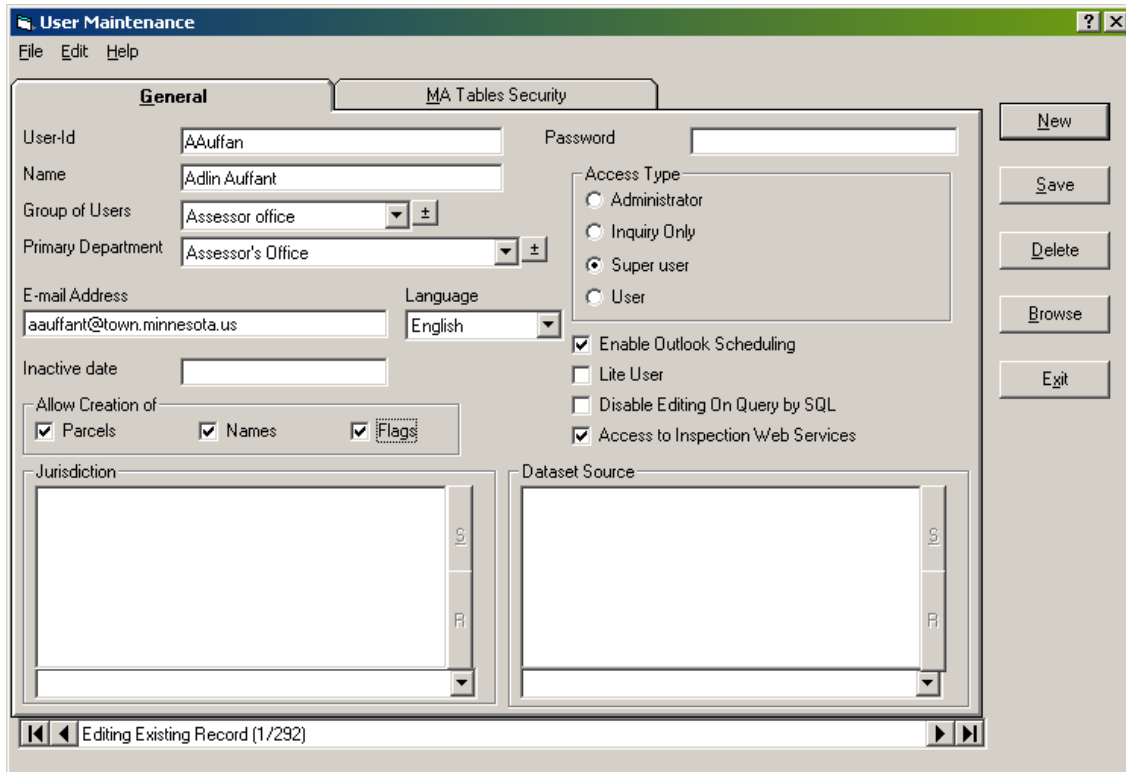
**Note:** Ensure that access permissions are granted to all schedulers

- Repeat this procedure, highlighting the *Calendar*, then the *Tasks* in step 2, to grant permissions for the **Outlook Calendar** and *Tasks*.

## Granting Access Rights in Govern

Perform the following procedure In order to grant access permissions to the schedulers in Govern.

- In Govern Admin, select *Setup* > **User Maintenance**.



2. Navigate to the appropriate user record.
3. Select **Enable Outlook Scheduling**.

**Note:** The *Govern User* must be identical to the *Exchange User ID* defined for the e-mail account

4. Repeat this procedure for each scheduler.

# Defining Inspection Parameters




## Overview

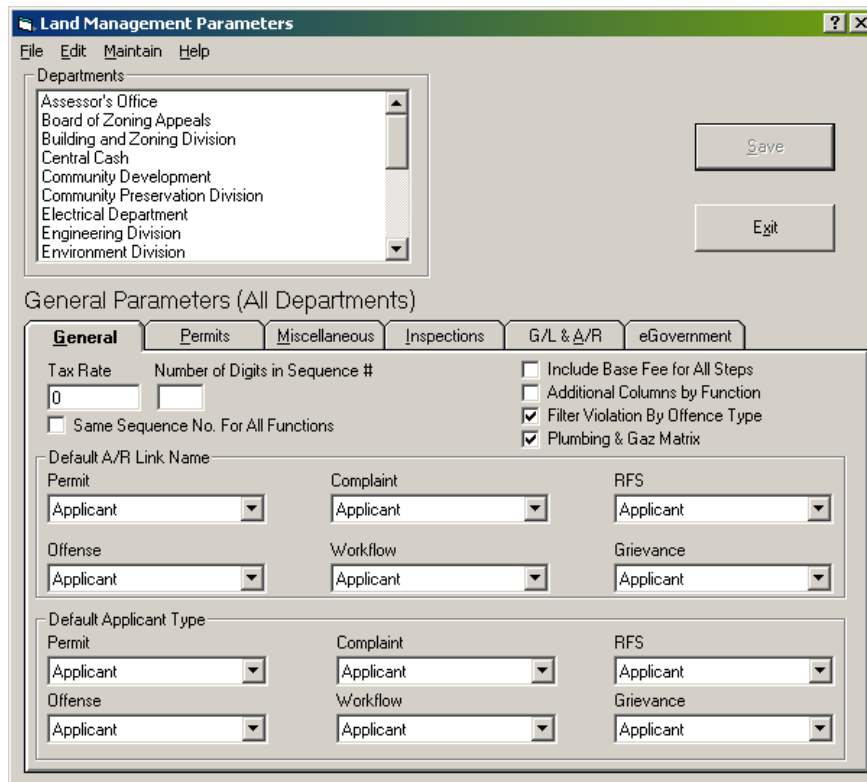
Basic parameters for inspection scheduling and activity status are set on the Land Management Parameters form. These parameters apply to all departments within the organization.

To access *Govern Admin* from Govern's main screen, select **Tools > System Administration (Govadm32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click  **System Administration**.

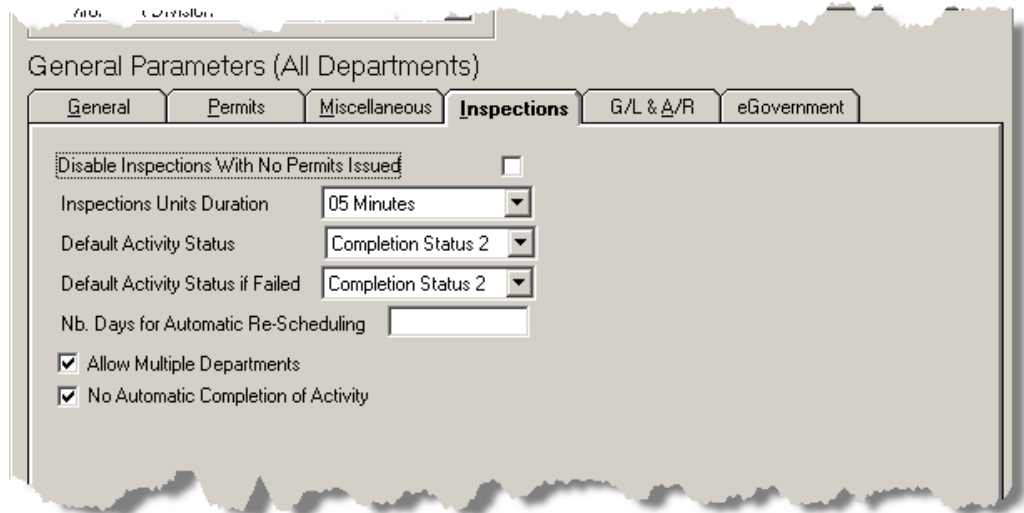
Select **Parameters > Land Management > Parameters**



The screenshot shows the 'Land Management Parameters' window. It has a menu bar with 'File', 'Edit', 'Maintain', and 'Help'. Below the menu is a 'Departments' list box containing: Assessor's Office, Board of Zoning Appeals, Building and Zoning Division, Central Cash, Community Development, Community Preservation Division, Electrical Department, Engineering Division, and Environment Division. To the right of the list are 'Save' and 'Exit' buttons. Below the list is the 'General Parameters (All Departments)' section. This section has tabs for 'General', 'Permits', 'Miscellaneous', 'Inspections', 'G/L & A/R', and 'eGovernment'. The 'General' tab is active. It contains several fields and checkboxes: 'Tax Rate' (0), 'Number of Digits in Sequence #' (empty), 'Include Base Fee for All Steps' (unchecked), 'Additional Columns by Function' (unchecked), 'Filter Violation By Offence Type' (checked), 'Plumbing & Gaz Matrix' (checked), 'Same Sequence No. For All Functions' (unchecked), and 'Default A/R Link Name' (empty). Below these are three columns of dropdown menus for 'Permit', 'Complaint', 'RFS', 'Offense', 'Workflow', and 'Grievance', all set to 'Applicant'. At the bottom, there is another set of three columns of dropdown menus for 'Default Applicant Type', also set to 'Applicant'.

On the *Land Management Parameters* form, open the **Inspections** tab and complete the parameters as described in this section.

## Inspections



The screenshot shows the 'General Parameters (All Departments)' form with the 'Inspections' tab selected. The form contains the following fields and options:

- Disable Inspections With No Permits Issued:** A checkbox that is currently unchecked.
- Inspections Units Duration:** A dropdown menu set to '05 Minutes'.
- Default Activity Status:** A dropdown menu set to 'Completion Status 2'.
- Default Activity Status if Failed:** A dropdown menu set to 'Completion Status 2'.
- Nb. Days for Automatic Re-Scheduling:** An empty text input field.
- Allow Multiple Departments:** A checked checkbox.
- No Automatic Completion of Activity:** A checked checkbox.

**Disable Inspections with No Permits Issued:** Select this option to disable the link between permits and inspections, until the permit is issued. Otherwise, if you need to schedule inspections, before permits are issued, deselect this option.

**Note:** Permits are automatically issued and assigned a Permit Number from an Activity Step. Refer to the *Activities* section of the *Permits & Inspections* guide, for further details.

**Inspection Units Duration:** Enter the duration of an Inspection Unit (Table: VT\_SY\_INTIMEUN). An Inspection Unit is a fixed length of time that is used as a building block for defining inspection times. All inspections need to be a multiple of the inspection unit. For example, if you enter Five, an inspection can last five, ten, 15 or 30 minutes but not 17 or 32 minutes.

**Note:** Inspection times include travel time.

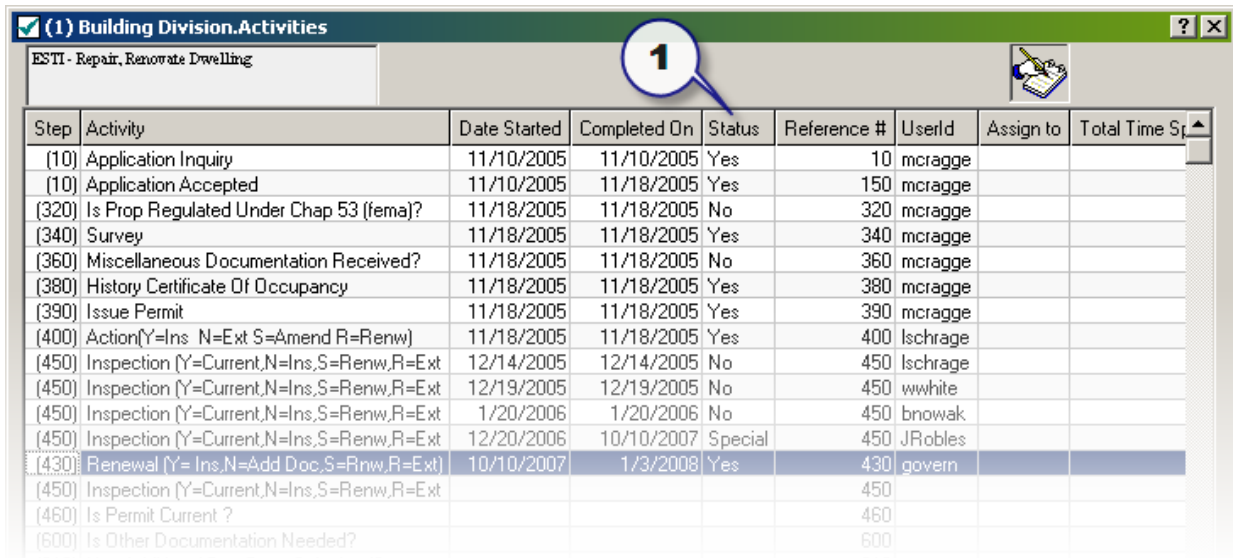
The *Inspection Scheduling* screen is divided into blocks equal to the inspection unit. The user selects these blocks to schedule an inspection.

The *Inspection Scheduling* screen is accessible from the Inspector's Schedule form in Govern Admin and from the Inspections function in Govern. See

*Creating an Inspector's Schedule on page 34 and Scheduling an Inspection on page 102. Activity Completion Status*

### Activity Completion Status

There are two parameters for automatically assigning the Completion Status to an activity, as the result of an inspection. One is for a successful inspection, the other for a failed or incomplete inspection. The status is displayed on the Activities function in Govern.



Step	Activity	Date Started	Completed On	Status	Reference #	UserId	Assign to	Total Time Sp
(10)	Application Inquiry	11/10/2005	11/10/2005	Yes	10	mcragge		
(10)	Application Accepted	11/10/2005	11/18/2005	Yes	150	mcragge		
(320)	Is Prop Regulated Under Chap 53 (fema)?	11/18/2005	11/18/2005	No	320	mcragge		
(340)	Survey	11/18/2005	11/18/2005	Yes	340	mcragge		
(360)	Miscellaneous Documentation Received?	11/18/2005	11/18/2005	No	360	mcragge		
(380)	History Certificate Of Occupancy	11/18/2005	11/18/2005	Yes	380	mcragge		
(390)	Issue Permit	11/18/2005	11/18/2005	Yes	390	mcragge		
(400)	Action(Y=Ins N=Ext S=Amend R=Renw)	11/18/2005	11/18/2005	Yes	400	lschrage		
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext	12/14/2005	12/14/2005	No	450	lschrage		
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext	12/19/2005	12/19/2005	No	450	wwhite		
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext	1/20/2006	1/20/2006	No	450	bnwak		
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext	12/20/2006	10/10/2007	Special	450	JRobles		
(430)	Renewal (Y=Ins,N=Add Doc,S=Rnw,R=Ext)	10/10/2007	1/3/2008	Yes	430	govern		
(450)	Inspection (Y=Current,N=Ins,S=Renw,R=Ext				450			
(460)	Is Permit Current ?				460			
(600)	Is Other Documentation Needed?				600			

The possible activity statuses are defined in VT\_USR\_PMACTAW:

- **Yes:** Activity is successfully completed
- **No:** Activity is not successfully completed.
- **Special User-Defined 1 and 2:** Activity is accepted on user-defined conditions.

*For details on defining these statuses, see Defining the Activity Completion Status on page 20.*

**Default Activity Status:** Select the status to be assigned to the activity, when an automatically-generated inspection is completed. See *Activity Completion Status on page 63, for details.*

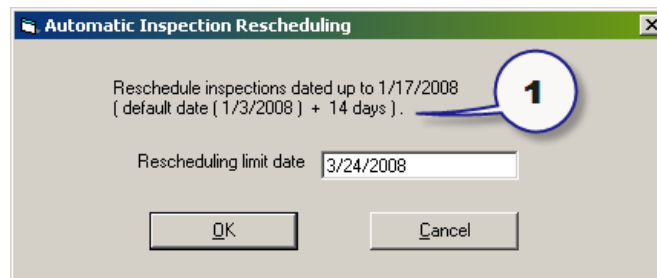
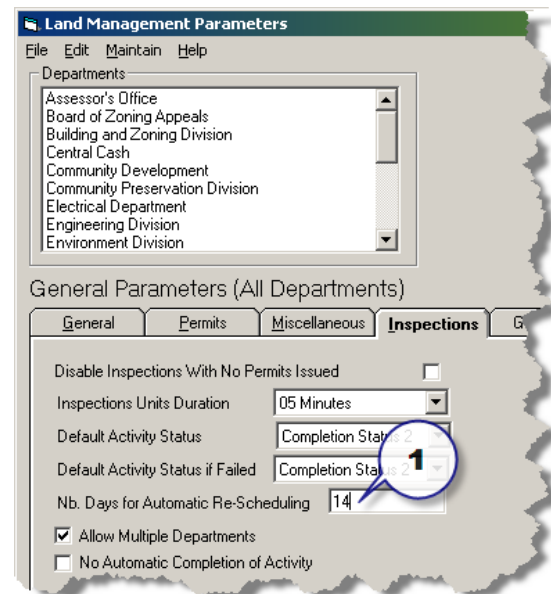
**Default Activity Status if Failed:** Select a default activity status to assign to an activity if an inspection fails. If an inspection is generated from an activity

and the inspection is completed but one or more inspection types have failed, the system returns this status to the activity.

## Automatic Rescheduling

### Number of Days for Automatic Rescheduling:

Enter the number of days for automatic rescheduling. This parameter is used in the batch Automatic Inspection Rescheduling process in Govern Batch Processing. It is added to the Default Date\* to determine the inspections to include in the process; i.e., all inspection scheduled for a date prior or equal to this date are included. For example, enter 14 to include all inspections scheduled within the next two weeks.



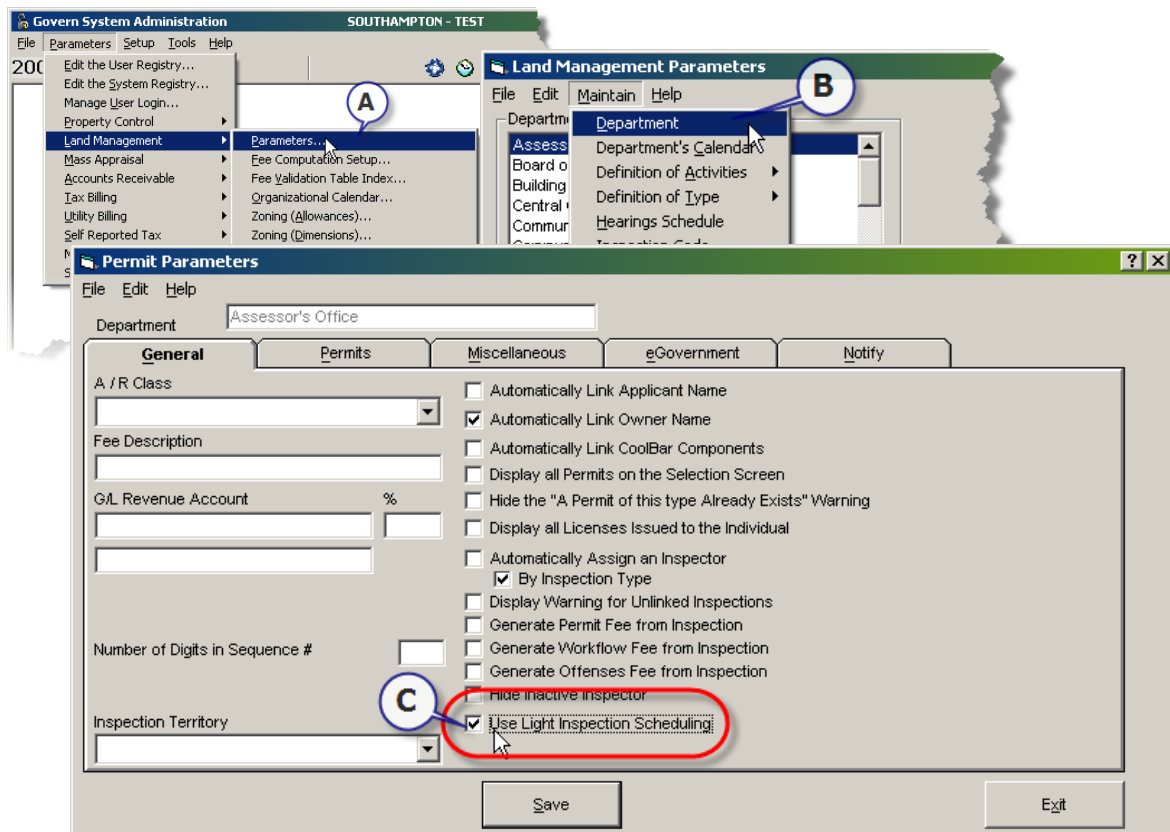
\* The default date is displayed on the task bar of the Govern Batch Processing application. This is the current date, unless it has been modified. See *Automatic Inspection Rescheduling on page 145*.



## Enabling Light Inspection Scheduling

*Light Inspection Scheduling* allows you to indicate scheduled times that bypass the scheduling restrictions that prevents conflicts in date and time. This would be the electronic equivalent of a sticky note reminder with a time written on it. In order to use the *Light Inspection Scheduling* feature, it must first be enabled in *Govern Admin...*

To enable *Light Inspection Scheduling*...



1. Select *Parameters* > **Land Management Parameters**.
2. In the **Land Management Parameters** form, select a department from the *Department* group; select *Maintain* > **Department**.

3. When the Permit Parameters form is displayed, select **Use Light Inspection Scheduling**.

**Note:** When this option is enabled, you will not be able to use the *Enhanced Inspection Scheduling Interface*. See *Enhanced Inspection Scheduling Interface* on page 109

## Defining Department Level Parameters



### Overview


Basic settings for automatically generated inspections and inspection fees are defined at the department level. For the Mobile Inspection and DeskTop Inspection components, there are two settings. These are defined on the Permit Parameters form and are the same for all inspections created by or generated from the department.

An inspector can be automatically assigned to a Scheduled Inspection, generated from a System Activity. This is set up at the department level.

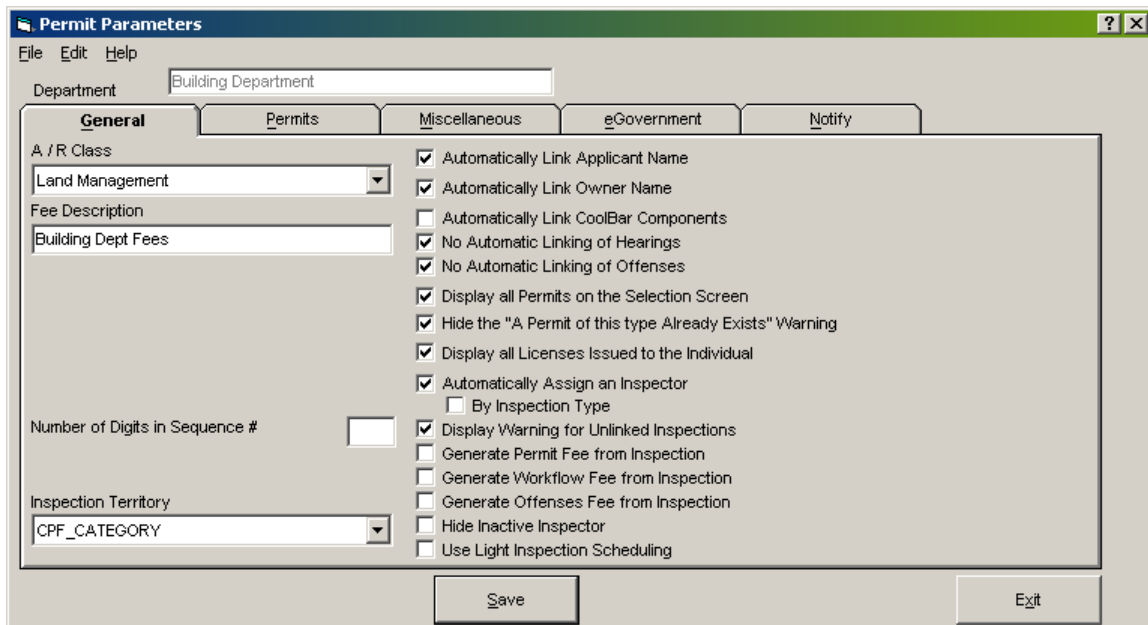
In addition, a fee can be automatically generated as the result of a failed or incomplete inspection. This type of fee is defined at the department level.

To access this form, from *Govern's* main screen, select *Tools > System Administration (Govadm32.exe)*

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click  *System Administration*.

Select *Parameters > Land Management > Parameters*. Highlight the department and select *Maintain > Department*.



The screenshot shows the 'Permit Parameters' window with the 'Department' dropdown set to 'Building Department'. The 'General' tab is selected, showing various settings for inspections and fees. The 'A / R Class' dropdown is set to 'Land Management' and the 'Fee Description' is 'Building Dept Fees'. The 'Number of Digits in Sequence #' is set to 1. The 'Inspection Territory' dropdown is set to 'CPF\_CATEGORY'. The right side of the form contains a list of checkboxes for various settings, including 'Automatically Link Applicant Name', 'Automatically Link Owner Name', 'Automatically Link CoolBar Components', 'No Automatic Linking of Hearings', 'No Automatic Linking of Offenses', 'Display all Permits on the Selection Screen', 'Hide the "A Permit of this type Already Exists" Warning', 'Display all Licenses Issued to the Individual', 'Automatically Assign an Inspector', 'By Inspection Type', 'Display Warning for Unlinked Inspections', 'Generate Permit Fee from Inspection', 'Generate Workflow Fee from Inspection', 'Generate Offenses Fee from Inspection', 'Hide Inactive Inspector', and 'Use Light Inspection Scheduling'. The 'Save' and 'Exit' buttons are at the bottom right.

**Automatically Link CoolBar Components:** Select this option to automatically link the following types of records to the current inspection:

- permits
- inspections
- hearings
- offenses
- workflow, complaints, request for services, grievances
- occupants
- buildings

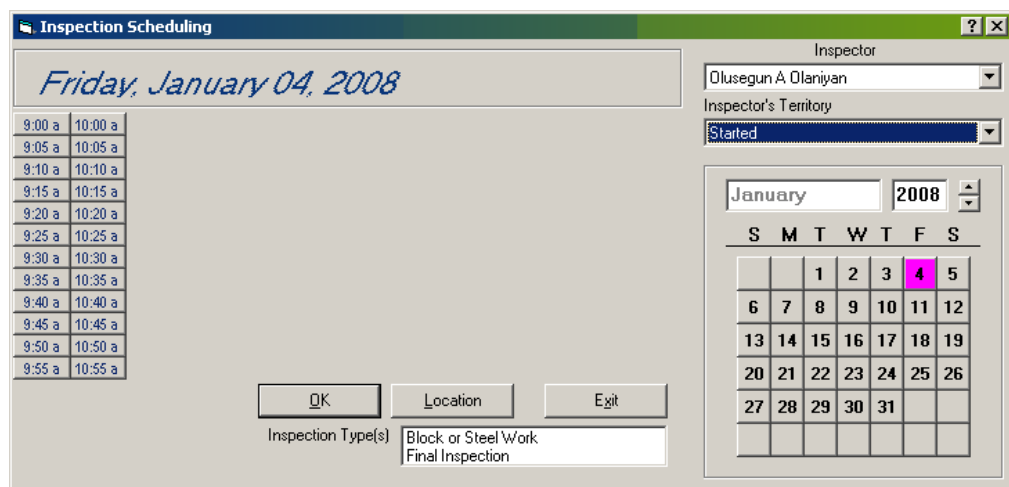
**For Example:**

If you are creating a new Inspection, and a building permit and hearing are already associated with the current record and displayed on the Govern CoolBar, they are automatically linked to the new record.

These records appear on the Links tab of the new inspection record.

**Automatically Assign an Inspector:** Select this option to automatically assign an inspector, when a request for an inspection is made.

The inspector is assigned, according to availability and territory; i.e., the location of the requested inspection needs to be within the territory assigned to the inspector. However, if *All Territories* have been assigned to the inspector, or if an *Inspector's Schedule* does not exist for the inspector, the inspector can be assigned to any inspection, located in any territory. See *Creating an Inspector's Schedule* on page 34 for more information.



**Inspection Scheduling**

Friday, January 04, 2008

Inspector: Olusegun A. Olaniyan

Inspector's Territory: Started

January 2008

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

OK Location Exit

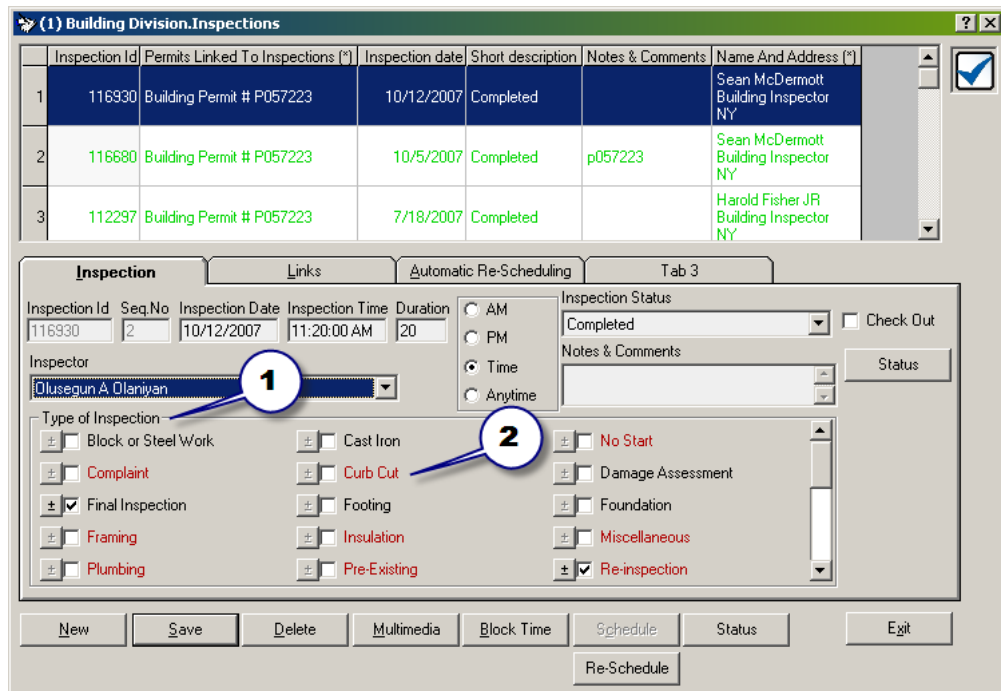
Inspection Type(s): Block or Steel Work  
Final Inspection

**By Inspection Type:** Select this option, if the Automatically Assign an Inspector option is selected, to assign inspectors by inspection type, as well as by territory. The inspector can only be assigned to an inspection if the inspection type matches one of inspection types selected on the Inspector's Schedule form. Otherwise, if no inspection types have been assigned to the inspector, the inspector can be assigned to any type of inspection.

See *Creating an Inspector's Schedule* on page 34 for more information.

The inspector is automatically added to the **Names** tab of the permit or license associated with the inspection.

**Note:** The **insp** code must be defined in the VT\_USR\_PMNAME table.



Inspection Id	Permits Linked To Inspections (*)	Inspection date	Short description	Notes & Comments	Name And Address (*)
116930	Building Permit # P057223	10/12/2007	Completed		Sean McDermott Building Inspector NY
116680	Building Permit # P057223	10/5/2007	Completed	p057223	Sean McDermott Building Inspector NY
112297	Building Permit # P057223	7/18/2007	Completed		Harold Fisher JR Building Inspector NY

**Inspection** | Links | Automatic Re-Scheduling | Tab 3

Inspection Id: 116930 | Seq.No: 2 | Inspection Date: 10/12/2007 | Inspection Time: 11:20:00 AM | Duration: 20

Inspector: **Olusegun A. Olaniyan** (1)

Type of Inspection:

- ☐ Block or Steel Work
- ☐ Complaint
- ☒ Final Inspection
- ☐ Framing
- ☐ Plumbing
- ☐ Cast Iron
- ☐ Curb Cut
- ☐ Footing
- ☐ Insulation
- ☐ Pre-Existing
- ☐ No Start
- ☐ Damage Assessment
- ☐ Foundation
- ☐ Miscellaneous
- ☒ Re-inspection (2)

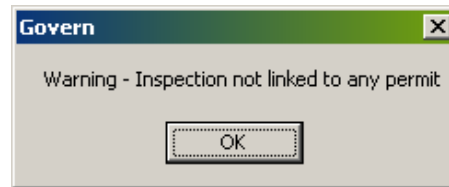
Inspection Status: Completed | Check Out: ☐ | Notes & Comments: | Status: |

Buttons: New, Save, Delete, Multimedia, Block Time, Schedule, Status, Re-Schedule, Exit

**Note:** If an inspector is not configured within Govern Admin to perform a specific type of inspection, the inspection type will be indicated in red in the Inspection function in Govern for Windows.

**Display Warning for Unlinked Inspections:** Select this option to display a warning message for an inspection that is not linked to a permit, license,

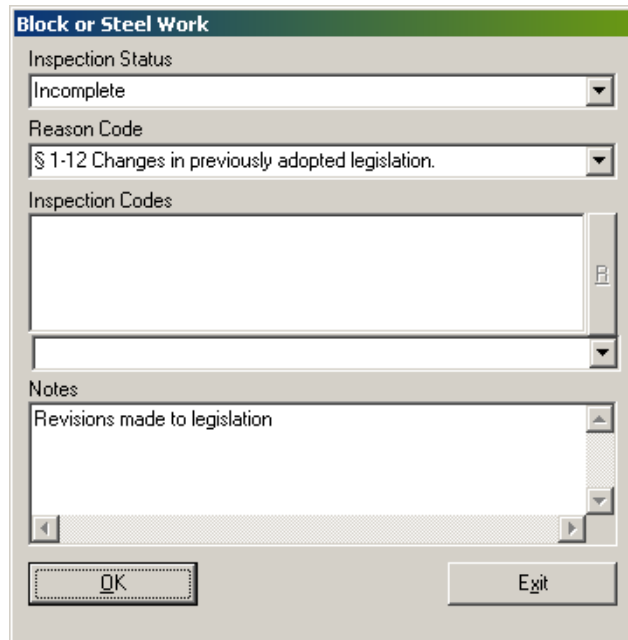
approval, bond, decision, prosecution or appeal. If the user tries to access the inspection in Govern, the following message appears:



## Generating Fees from Inspections

You can set up fees for failed or incomplete inspections for a permit, workflow or offense. When you select one of the following options, the **Reason Code** and Fee Amount fields are automatically displayed. The fee is generated from the Inspections function in Govern for Windows.

**Note:** You can select only one reason and apply only one amount, per department, for an incomplete or failed inspection



**Generate Permit Fee From Inspection:** Select this option to set up a fee for an incomplete or failed inspection for a permit. Then, select a reason for

charging the fee from the Reason Code field and enter an amount in the **Fee Amount** field.

**Generate Workflow Fee From Inspection:** Select this option to set up a fee for an incomplete or failed inspection for a workflow. Then, select a reason for charging the fee from the **Reason Code** field and enter an amount in the **Fee Amount** field.

**Generate Offenses Fee From Inspection:** Select this option to set up a fee for an incomplete or failed inspection for an offense. Then, select a reason for charging the fee from the **Reason Code** field and enter an amount in the **Fee Amount** field.

**Hide Inactive Inspector:** When selected, this option not display inspectors that are designated as inactive.

**Reason Code:** Select a justification for the fee from the **Reason Code** drop-down list (Table: VT\_USR\_PMINTYRE).

**Fee Amount:** Enter an amount for the fee. The Govern user can modify this amount from the *Inspections* function if **Allow Fee and G / L Override** is selected on the *Land Management Parameters* form.

**Note:** This fee is not displayed on the Mobile or DeskTop Inspection Web pages. It is added to the total fees for the associated permit, offense or workflow.

**Inspection Territory:** You can define Inspection Territories by department. Do one of the following:

- If you are defining Inspection Territories for the selected department, select the database field created for these codes on the Property Area function.
- If you are using the Inspection Territories defined for the organization, leave this field blank.

*See Defining Inspection Territories on page 24, for details.*

# Generating Inspections through System Activities



## Overview

Both Scheduled and Unscheduled Inspections can be automatically generated from a *System Activity* linked to the Activity Setup for a permit, offense or workflow. A *System Activity* is an action or event in the permit process. Each *System Activity* is linked to an *Activity Step*, or stage in the process. The Activity Steps are joined together to form the Activity Setup. See *Glossary on page 160*, for further details.

You can define the following details for an automatically-generated inspection:

- Type of scheduling: *Scheduled or Unscheduled*
- When to schedule the inspection, for example, the initiation or completion of the activity
- What *Inspection Types* to assign

For a Scheduled Inspection, the date and time are set, when the inspection is generated. In addition, an inspector is assigned, if the Automatically Assign an Inspector option is selected on the Permit Parameters form in Govern Admin. See *Automatically Assign an Inspector on page 68*, for details.


For an Unscheduled Inspection, the **Date**, **Time** and **Inspector** fields are left blank, when the inspection is generated.

For both *Scheduled* and *Unscheduled Inspections*, the *Inspection Types* can be either automatically generated from the activity or selected by the Govern user.

You can link the inspection to other departments.

To set up an activity, from Govern's main screen, select **Tools > System Administration (Govadm32.exe)**

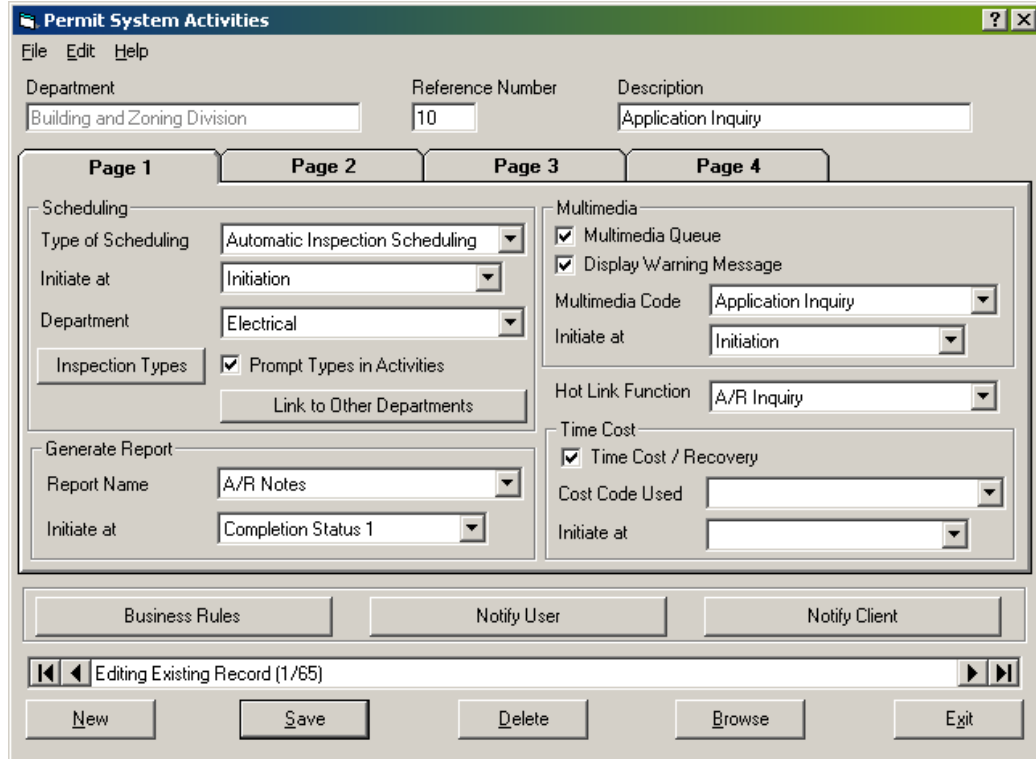
**OR**

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click  *System Administration*.



Select *Parameters* > *Land Management* > **Parameters**.

Highlight a department and select *Maintain* > *Definition of Activities* > **Permits, Offenses or Workflows**



### Defining an Automatically Generated Inspection

To define an inspection that is generated from an activity:

1. In the Permit System Activities form select one of the following, from the *Types of Scheduling* drop-down list:
  - Unscheduled Inspection
  - Automatic Inspection Scheduling

**Note:** Hearings can also be automatically scheduled, from an activity. *Refer to the Permits guides for details.*

2. Specify the point at which the selected inspection is to be initiated, from the **Initiate at** drop-down list (Table: VT\_SY\_ACTION).

Status **1, 2, 3** and **4** correspond to the **Yes, No, Special 1** and **2** fields on the *Activities Setup — Permit* form, the *Activities Setup — Offense* or the

*Activities Setup — Workflow* form. Refer to the Permit Type Maintenance section of the Permits & Inspections guide for details.

- Initiation
  - **Completion Status 1**, corresponding to a yes response indicating the activity step is successfully completed
  - **Completion Status 2**, corresponding to a no response indicating the activity is not successfully completed
  - **Completion Status 3 and 4**, corresponding to a special response indicating the activity step is accepted on user-defined conditions. *Refer to the Activities Setup section of the Permits & Inspections guide for details on defining an Activity Status.*
  - **Completion All Status** indicating any of the above
3. Click **Save**

## Assigning an Inspection to Another Department

### For Example:

Before issuing a certificate on a new building, the Building Department requires a Fire Inspection. When setting up a Permit System Activity, the Building Department can add an inspection and assign the inspection to the *Fire Department*.

To assign an inspection to another department:

1. Set up the inspection, as defined in steps *Defining an Automatically Generated Inspection* on page 73.
2. Select the name of the department, to which you want to assign the inspection, from the **Department** drop-down list.
3. Click **Save**.

Otherwise, if you leave the **Department** field blank, the inspection will be assigned to the department that created the activity.

## Completing an Activity

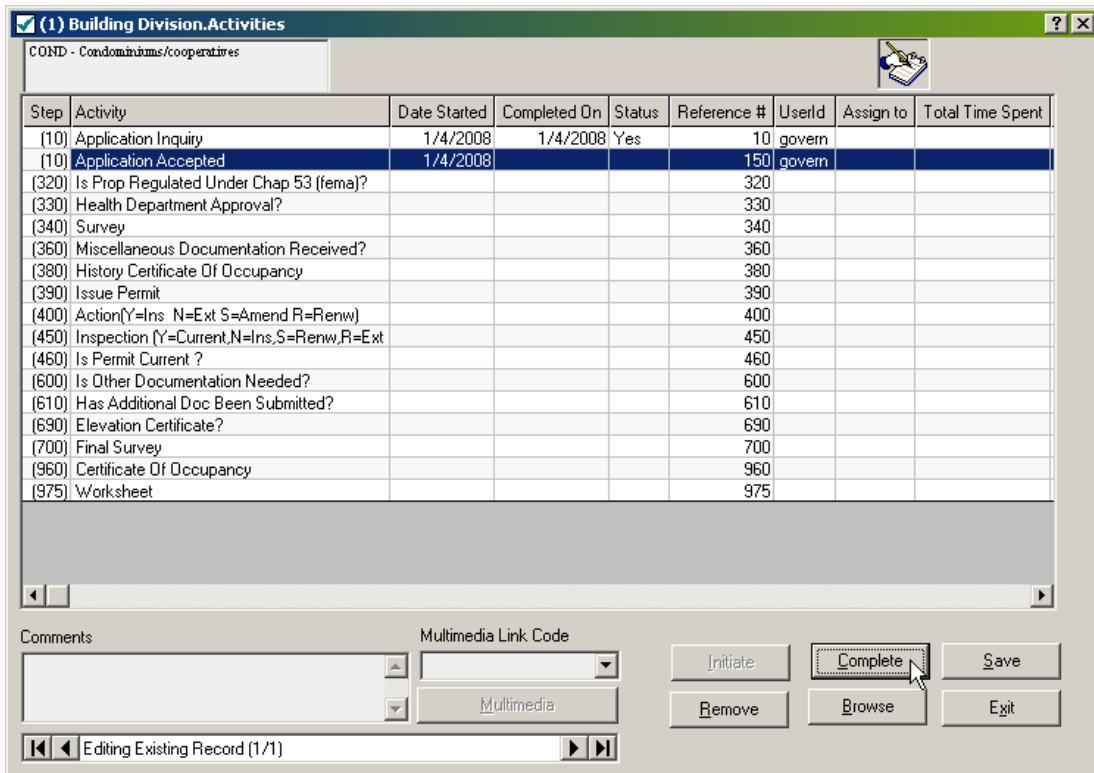
If an *Activity* is complete when the Inspection is completed, the following conditions apply:

## Generating Inspections through System

- The *Activity* is automatically completed if the *Inspection* is completed by the same department that created the *Activity*.
- Otherwise, if the *Inspection* is assigned to a different department and completed by the assigned department, the *Activity* must be completed manually.

To complete an *Activity*:

1. Launch Govern for Windows.
2. Open the *Activities* function for the applicable record.

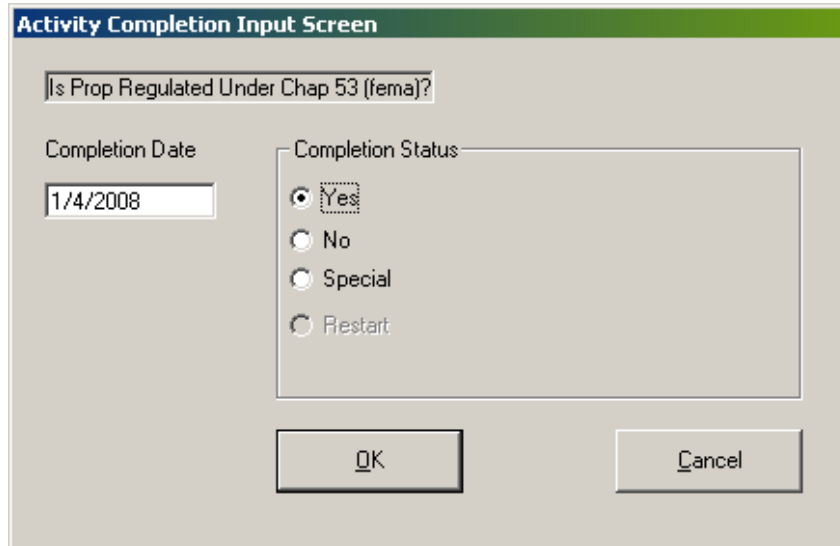


The screenshot shows a window titled "(1) Building Division.Activities" with a sub-header "COND - Condominiums/cooperatives". It contains a table with the following data:

Step	Activity	Date Started	Completed On	Status	Reference #	UserId	Assign to	Total Time Spent
(10)	Application Inquiry	1/4/2008	1/4/2008	Yes	10	govern		
(10)	Application Accepted	1/4/2008			150	govern		
(320)	Is Prop Regulated Under Chap 53 (fema)?				320			
(330)	Health Department Approval?				330			
(340)	Survey				340			
(360)	Miscellaneous Documentation Received?				360			
(380)	History Certificate Of Occupancy				380			
(390)	Issue Permit				390			
(400)	Action(Y=Ins N=Ext S=Amend R=Renw)				400			
(450)	Inspection(Y=Current,N=Ins,S=Renw,R=Ext				450			
(460)	Is Permit Current ?				460			
(600)	Is Other Documentation Needed?				600			
(610)	Has Additional Doc Been Submitted?				610			
(690)	Elevation Certificate?				690			
(700)	Final Survey				700			
(960)	Certificate Of Occupancy				960			
(975)	Worksheet				975			

Below the table, there is a "Comments" field, a "Multimedia Link Code" dropdown, and a "Multimedia" button. To the right are buttons for "Initiate", "Complete", "Save", "Remove", "Browse", and "Exit". The "Complete" button is highlighted with a mouse cursor. At the bottom, a status bar indicates "Editing Existing Record (1/1)".

3. Highlight the activity.
4. Click **Complete**.



The image shows a software dialog box titled "Activity Completion Input Screen". It has a green header bar. Inside, there is a text field at the top containing "Is Prop Regulated Under Chap 53 (fema)?". Below this, on the left, is a "Completion Date" label followed by a date input field showing "1/4/2008". To the right of the date field is a "Completion Status" label followed by a group box containing four radio button options: "Yes" (which is selected), "No", "Special", and "Restart". At the bottom of the dialog are two buttons: "OK" and "Cancel".

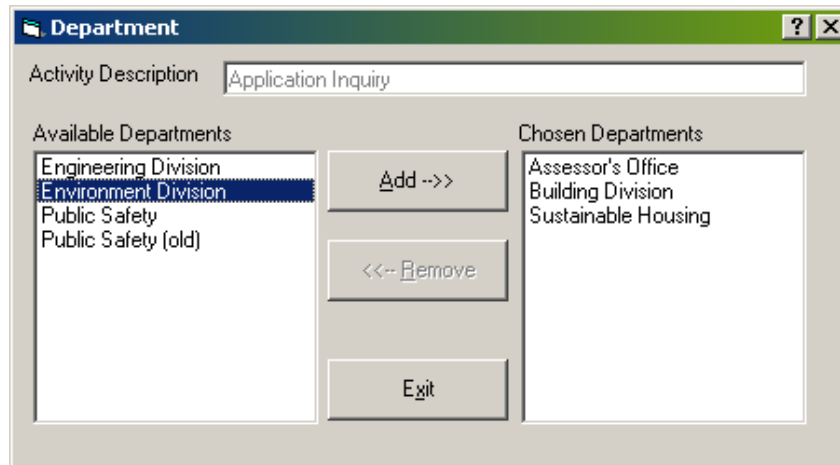
5. Select the Completion Status, from the Activity Completion Input Screen.
6. Click **OK**.

*For complete details on the Activities functions, refer to the Permits guide.*

## Linking the Inspection to Other Departments

To link an inspection to another department:

1. Set up the inspection, as defined in steps *Defining an Automatically Generated Inspection on page 73*.
2. Click **Link to Other Departments** on the *Permit System Activities* form.



The **Available Departments** field displays all the departments, within the organization that have access to the Inspections function in Govern. For details on granting access to a department, see *Granting Department Access to the Inspections Function* on page 13.

The **Chosen Departments** field displays the departments that can access the inspection.

3. Highlight a department in the **Available Departments** field
4. Click **Add -->**.  
To delete a link to a department highlight it in the **Chosen Departments** list and click **<< Remove**.
5. Click **Exit**.

## Defining the Inspection Types

Inspection Types are user-defined codes, created to classify an inspection according to what is inspected, for example, framing, water or damage. They are saved to VT\_USR\_INSPECT. See *Defining Inspection Types or Codes* on page 16, for full details.

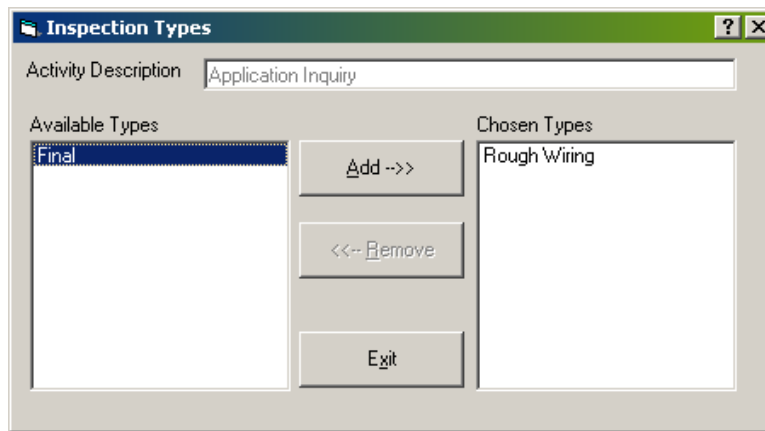
You can associate the Inspection Types, with the inspection, at either the administrative level on a secondary screen launched from the Permit System Activities form or at the data entry level on the Inspections function in Govern.

If inspection types are defined at the administrative level, they are automatically selected on the Inspections function in Govern. The user can deselect these types and select alternate ones, if required.

You can also select the **Prompt Type in Activities** to display the Inspection Type screen to the user, when the activity is generated.

To define the Inspection Types:

1. Click **Inspection Types** to launch the Inspection Types screen.



The **Activity Description** field displays the activity selected on the *Permit System Activities* form.

The **Available Types** field displays the Inspection Types, available to the department.

Otherwise, the *Inspection Types* available to the department, creating the activity, are displayed.

The **Chosen Types** fields displays the inspection types selected for the inspection.

2. Highlight an *Inspection Type* in the **Available Types** field
3. Click **Add >>**.

To delete an Inspection Type, highlight it in the Chosen Types list and click **<< Remove**.

Click **Exit**. On the *Permit System Activities* form, select **Prompt Type in Activities** to display the *Inspection Type* screen to the user, when the activity is run. The Govern user needs to select the applicable types.

---

# Inspection Templates



## Overview


As a part of standard procedure, certain inspection types may require the accompaniment of customized or supplementary files; this “template” file may be a notification letter or a form that is to be completed. If this is a process that must be repeated each time a specific inspection is created, attaching the file can become tedious.

The process of attaching a template file to an inspection type has been streamlined in Govern. The template can be in the form of an Adobe Acrobat **.pdf**, or Microsoft Word **.doc** file. The association to the template is set through Govern Admin and when the inspection type is created, can then be accessed through the Multimedia link in Govern for Windows.

To attach an inspection template:

Access *Govern Admin* from Govern's main screen, select **Tools > System Administration (Govadm32.exe)**

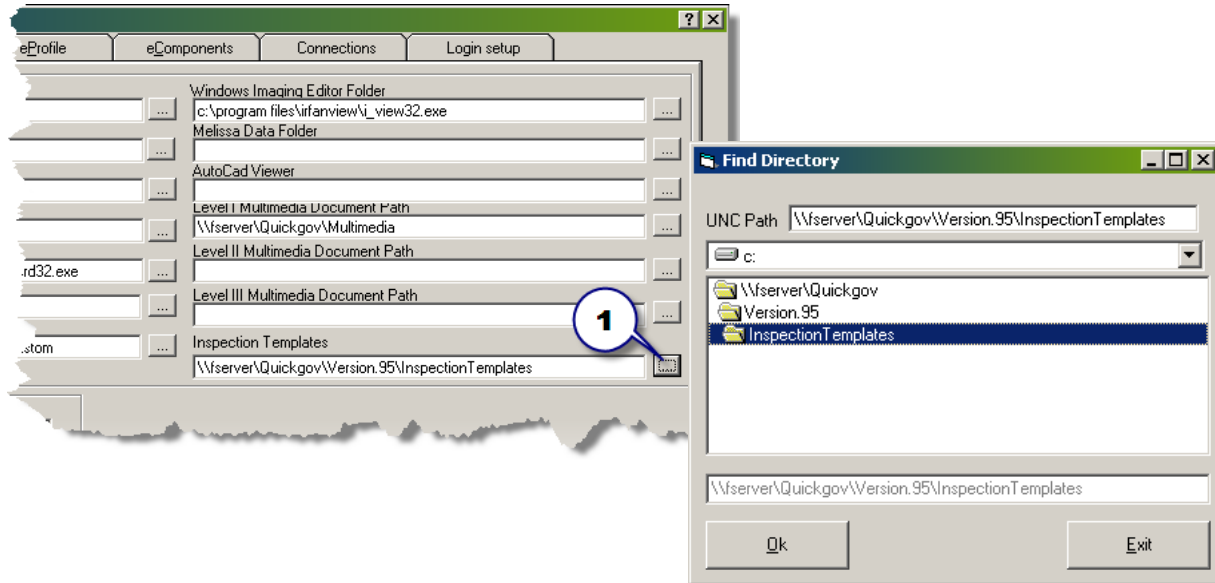
**OR**

Click **Applications** in the *Side Navigation Bar* to display Govern applications; click  *System Administration*.

## Setting the Path to existing Templates

To set the path to a directory containing existing templates:

1. Select *Parameters > Edit the System Registry*.
2. If not selected, click the **Govern** tab.



3. In the **Inspection template** field click on the button to navigate to an existing template.
4. Select a location; click **OK**.
5. In the *System Registry Maintenance* screen, click **Save** to save the location; click **Exit**.

**Note:** Ensure that the template that is being attached is in Adobe Acrobat **.pdf** or Microsoft Word **.doc** format.

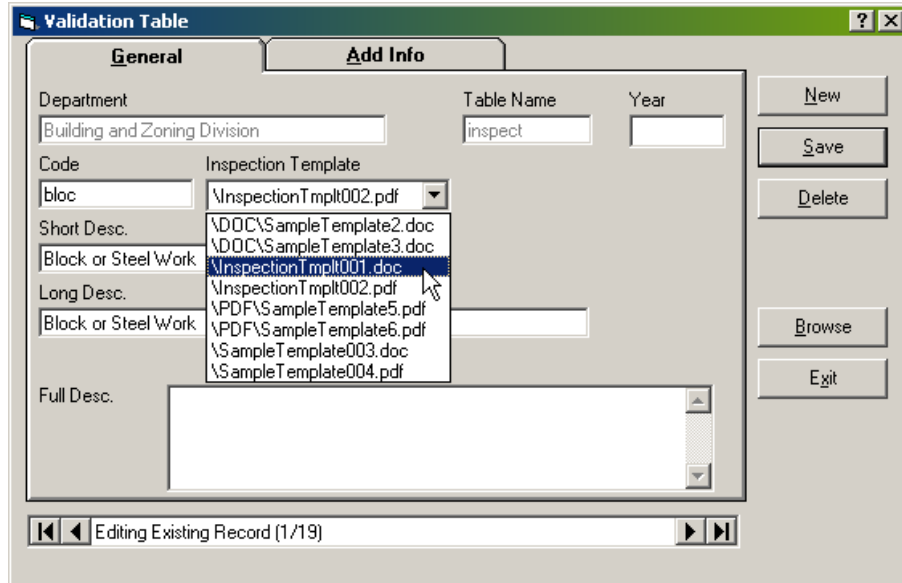
## Assigning a Template to an Inspection Code

Once the path to templates have been established, it is necessary to assign the template to an *Inspection Code*.

To assign a template to an inspection code:

1. In *Govern Admin* select *Parameters > Land Management > Parameters*.
2. Select a **Department** from the *Land Management Parameters* form.
3. Select *Maintain > Inspection Code*.
4. Any templates that are in the pre-assigned directory can be selected from the drop-down menu.

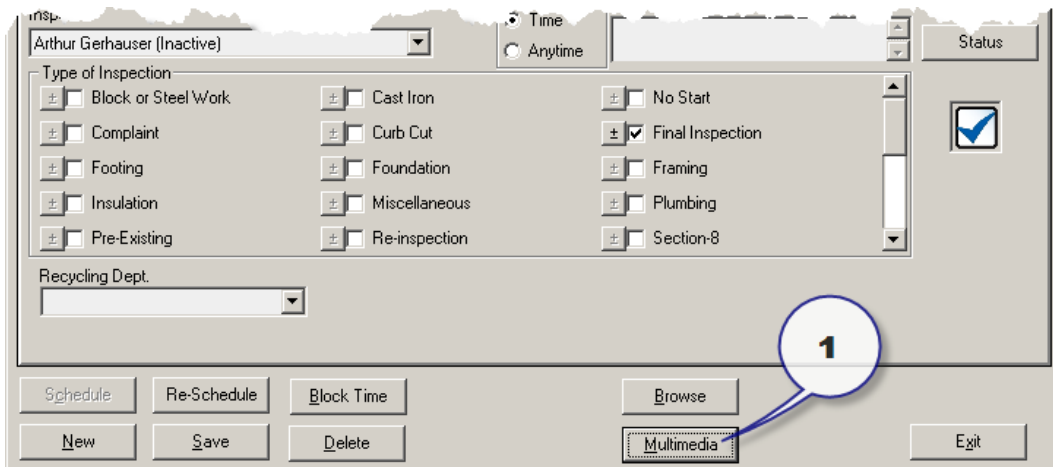




5. Click **Save**.

As a new inspection is created through the *Inspection* form in Govern, a file is created for each inspection code. These files are multimedia file types with a copy of the related template attached.

In addition a file is also created when we add an inspection code to an existing inspection. The inspection files are automatically attached to the inspection multimedia files and can be accessed through the *Multimedia* button of the Inspection form in Govern for Windows.



### Inspection File Nomenclature

The inspection files are named as follows:

in\_**inspID**\_**inspectionCode**.pdf or in\_**inspID**\_**inspectionCode**.doc

- **inspID** - Inspection ID
- **inspectionCode** - Inspection Code

**Note:** When an **Export to an Inspector's Database** is performed, all inspection templates, and inspection files related to the exported inspection, are copied to the inspector's computer.

**Note:** When an **Import from an Inspector's Database** is performed, all the inspections files are transferred back to the main database replacing the old files.

# Inspection Search Screens




## Overview

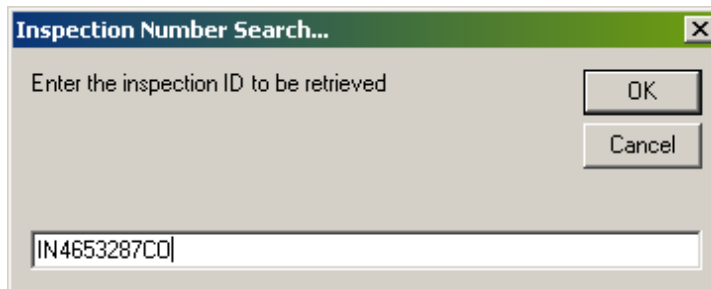
Two search screens are provided for retrieving inspection records:

- Inspection Number Search
- Inspection Search

## Inspection Number Search

To search for an inspection by ID number:

1. In Govern, select a department and default dataset, or click the **Quick Open** icon, .
2. Click *Select* > **Inspection Number Search** from the main menu in *Govern*:



3. Enter the inspection number in full and click Search.

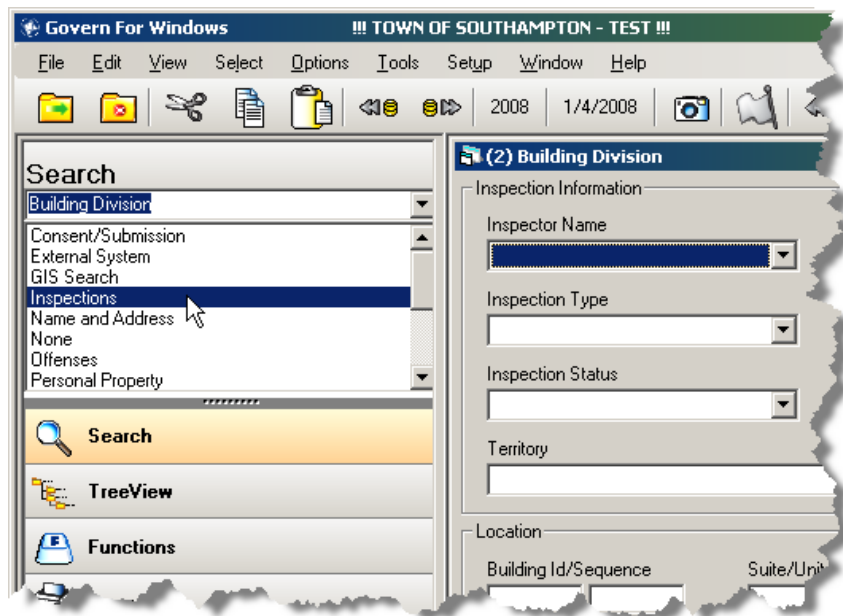
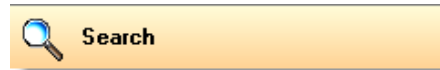
## Inspection Search

### Enhanced Inspector Search Screen

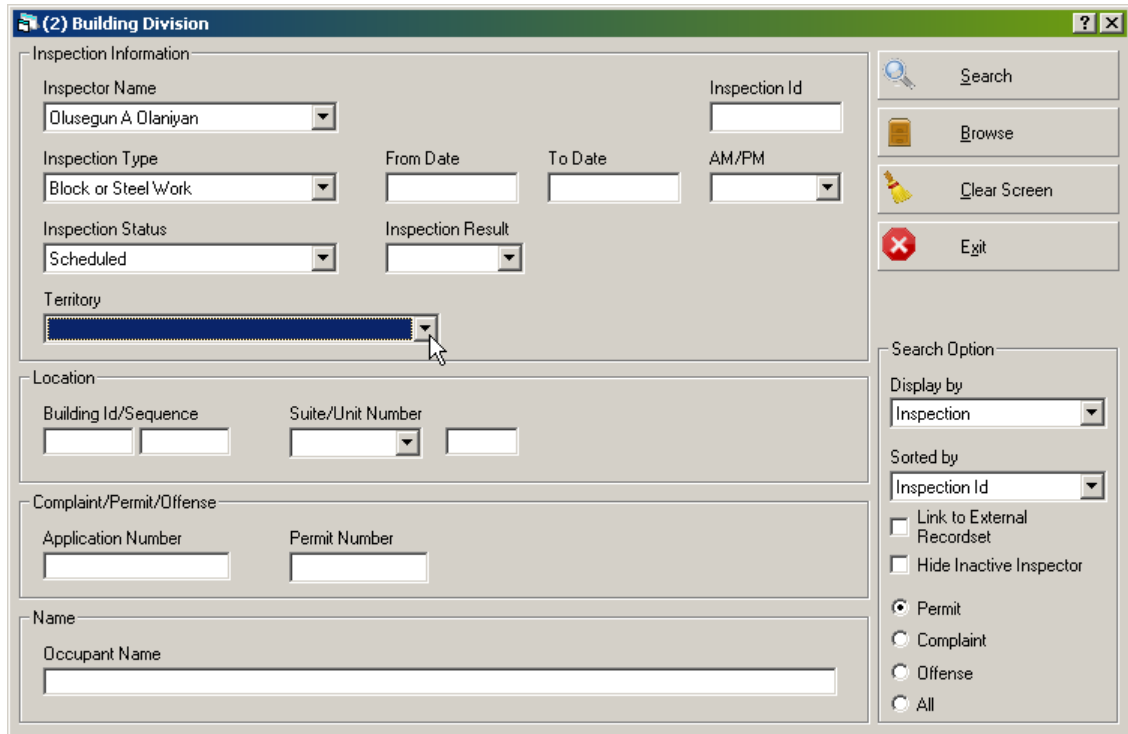
The Govern user interface has been enhanced with updates to the look and feel navigation. See *The Govern Interface in the General Information guide*.

To search for an inspection using other criteria:

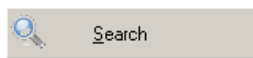
1. Click **Search** in the **Side Navigation Bar (SNB)**.



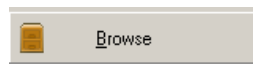
2. In the *Treeview* area on the upper left hand side (LHS), select **Inspections** to display the **Inspection** search form.
3. Enter your information into the required fields; click **Search**.



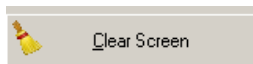
### Inspection Search Command Buttons



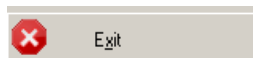
Enter your search criteria in the applicable fields and click **Search**. Results of the search are displayed on *Search Results* page.



Click **Browse** to view a list of the permits and licenses matching the criteria on your screen. Select an record to view results on the *Search Results* screen.



Click **Clear Screen** to clear all fields of the form; you can now enter new information for another search. *Search Results* screen.



Click **Exit** to close this form.

## Inspection Search Parameters

### Inspection Information group

**Inspector Name:** Select the Inspector's Name from the drop-down list.

**Inspection ID:** Enter the full identification number of the inspection.

**Inspection Type:** Select the inspection type from the drop-down list (Table: VT\_USR\_INSPECT).

**From Date / To Date:** Enter a range of dates to define the search.

**AM / PM:** Select an option to indicate the type of inspection scheduling (Table: VT\_SY\_INSPAMPM):

- **AM:** for inspections that need to be performed during the morning.
- **PM:** for inspections that need to be performed during the afternoon.
- **Time:** for inspections that are automatically scheduled at a specific time and for a specific duration.
- **Anytime:** for inspections that need to be performed at sometime during the specified day.

**Inspection Status:** Select the status of the Inspection, such as completed, scheduled, unscheduled or voided (Table: VT\_SY\_INSTAT).

**Inspection Result:** Select the conclusion of the inspection, such as passed, failed or incomplete (Table: VT\_USR\_PMINTYST).

**Territory:** Select the inspection territory from the drop-down list (Table: VT\_USR\_INSPTR).

### Location group

**Building ID / Sequence:** Enter the building ID or sequence number.

**Suite/Unit Number:** Select the type of unit, such as apartment, floor, suite, room, unit or penthouse (VT\_USR\_SECADD). Then enter the unit number in the space provided.

## Complaint/Permit/Offense group

### Name group

**Occupant Name:** Enter the name of the occupant of the property scheduled for inspection.

### Search Option group

**Display by:** Click the drop down menu list and select how you want The results displayed by: Inspection or Tax Map.

**Sorted by:** Click the drop down menu list and select the field you want to use for sorting the inspections: Inspection Date, Inspection ID, Inspection Results, Inspection Status, Inspection Type, Inspector Name, Number, Occupant Name, Tax Map, or Territory. The default is Inspection ID.

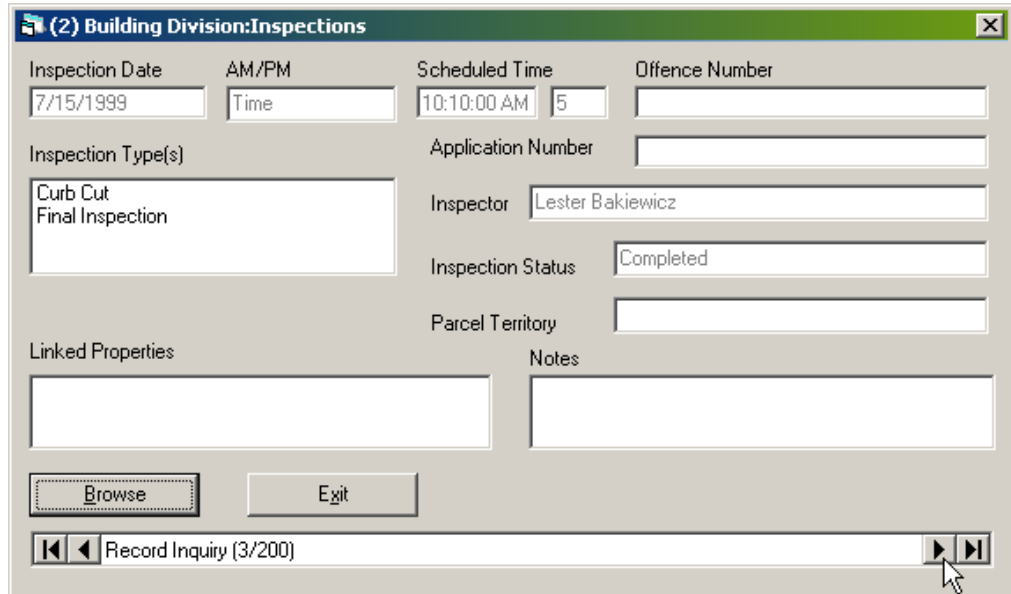
**Link to External Recordset:** Select this option to search through an external recordset previously downloaded to PC\_EXTERNAL.

Select **Permit**, **Complaint**, or **Offense** to search for an inspection linked to one of these items or click **All** to search through all the inspections, regardless of the function they are linked to.

- If you select **Permit**, the Permit Number and the Application Number fields are enabled.
- If you select **Complaint**, the Complaint Number field is enabled.
- If you select **Offense**, the Offense Number field is enabled.
- If you select **All**, no fields will be displayed in the **Complaint/Permit/Offense** group.


## Inspection Results Screen

The Results screen displays the records that match the criteria entered on the Inspection Search screen. Use the right and left navigational arrows to scroll through the records or click Browse to view a list of all the records.



### Inspection Results Command Buttons

**Browse:** Click Browse to view a listing of the permits and licenses matching your criteria. To select a record, highlight it in the list; then, click Select to view it on the Results screen.

Alternately, you can use the right  and left  navigational arrows to scroll to a record.

**Exit:** Click **Exit** to close the form.

### Inspection Results Parameters

The following information is displayed:

- **Inspection Date:** displays the date the inspection took place
- **AM / PM:** See *AM / PM* on page 86



- **Scheduled Time:** displays the date and time for which the inspection was scheduled
- **Permit, Complaint or Offense Number:** depending on the option selected on the Search screen.
- **Application Number:** displays the application number of the permit, license, complaint or workflow for which the inspection was scheduled
- **Inspection Types:** displays the type of inspection that was performed
- **Inspector:** displays the name of the inspector
- **Inspection Status:** displays the status of the inspection, completed, scheduled, unscheduled or voided (Table: VT\_SY\_INSTAT).
- **Parcel Territory:** displays the inspection territory (Table: VT\_USR\_INSPTR)
- **Linked Properties:** displays the other properties that are linked to the inspection through the Inspection Group field
- **Notes:** displays the notes or comments added to the inspection.

*Refer to the Permits guide for more information on these fields.*

# Inspections



## Overview

The Inspections function is used for recording and maintaining all inspection data. You can perform the following tasks:

- Schedule dates and times for new inspections
- Modify existing inspections
- Reschedule incomplete inspections
- Set up automatic rescheduling
- Link work codes to inspections
- Link other records, including properties, buildings, permits, etc.
- Link multimedia documents

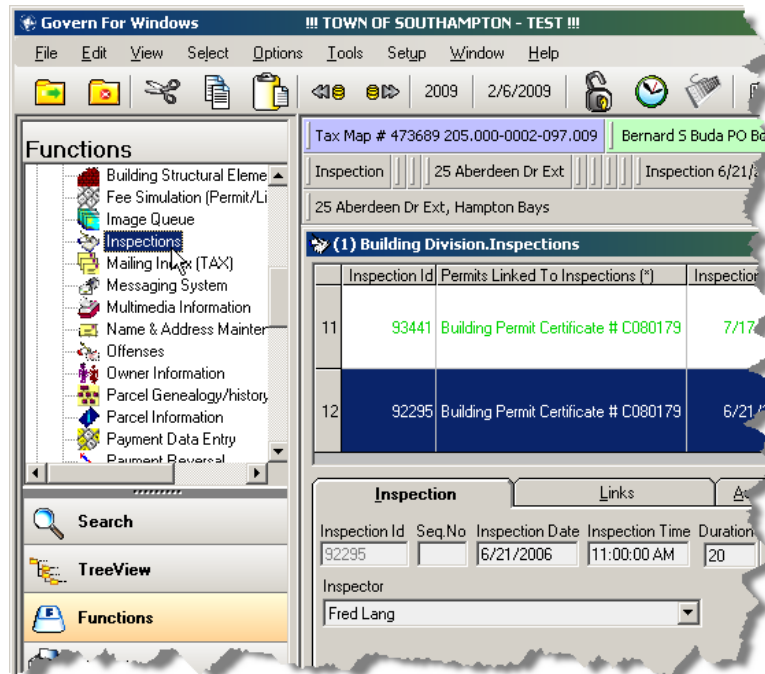
Inspection records can be created manually, by a Govern user, or generated automatically, from a system activity. In addition, a combination of the automatic and manual features can be used to complete a record.

Inspection Scheduling can be integrated with Microsoft® Outlook®; so that inspections scheduled through Govern, either manually or automatically, are automatically added to the inspectors' Outlook Calendar and Task Lists and that the time booked through Outlook is automatically blocked on the Inspectors' Schedules, in Govern.

To access this function, select a record and:

1. Click **Functions** in the **Side Navigation Bar**.









- In the *Treeview* area on the upper left hand side (LHS), select **Inspections**.

## Redesigned Inspections Form

The Inspections form was re-designed in version 9.5. A user accessible grid was added to the form. This grid shows only the days inspections for an inspector and the inspection record form. This was done to allow an inspector to navigate and enter his \ her inspection results directly in the same form. Additional enhancements included color coding to indicate inspection status.

### Color Coding for Inspection Status

Inspection status color coding is as follows:

Color		Inspection Status
	Black	Inspection is on schedule
	Green	Inspection has been completed
	Yellow	Inspection is one (1) day overdue
	Red	Inspection is two (2) or more days overdue

## Inspections



Color		Inspection Status
	Magenta	Inspection is unscheduled
	Grey	Inspection is void

**(1) Building Division.Inspections**

	Inspection Id	Permits Linked To Inspections (*)	Inspection date	Short description	Notes & Comments	Name And Address (*)
6	112236	Building Permit Certificate # C080179	7/18/2007	Scheduled		Fred Lang Inspector Building Division Southampton, NY 11968
7	98445	Building Permit Certificate # C080179	9/21/2006	Completed	basement ins	Fred Lang Inspector Building Division Southampton, NY 11968

**Inspection** | Links | Automatic Re-Scheduling | Offences

Inspection Id: 92295 | Seq.No: | Inspection Date: 6/21/2006 | Inspection Time: 11:00:00 AM | Duration: 20

Inspector: Fred Lang

Inspection Status: Completed | Check Out: ☐

Notes & Comments:

Status:

☒ Show All Types of Inspection

Type of Inspection:

<input checked="" type="checkbox"/> Block or Steel Work	<input type="checkbox"/> Cast Iron	<input type="checkbox"/> No Start
<input checked="" type="checkbox"/> Complaint	<input type="checkbox"/> Curb Cut	<input type="checkbox"/> Damage Assessment
<input type="checkbox"/> Final Inspection	<input checked="" type="checkbox"/> Footing	<input checked="" type="checkbox"/> Foundation
<input type="checkbox"/> Framing	<input type="checkbox"/> Insulation	<input type="checkbox"/> Miscellaneous
<input type="checkbox"/> Plumbing	<input type="checkbox"/> Pre-Existing	<input type="checkbox"/> Re-inspection

New | Save | Delete | Schedule | Re-Schedule | Block Time | Multimedia | Exit

### Selecting Items in the Inspections Grid

Items in the grid are user selectable. When you click on an inspection item in the grid, the current record set will point to the parcel, permit, and inspection record. This makes it easy for an inspector to call other Govern for Windows functions e.g. (GIS, Permit Record, etc...) and be automatically pointing to the appropriate record.

## Viewing Inspection Records

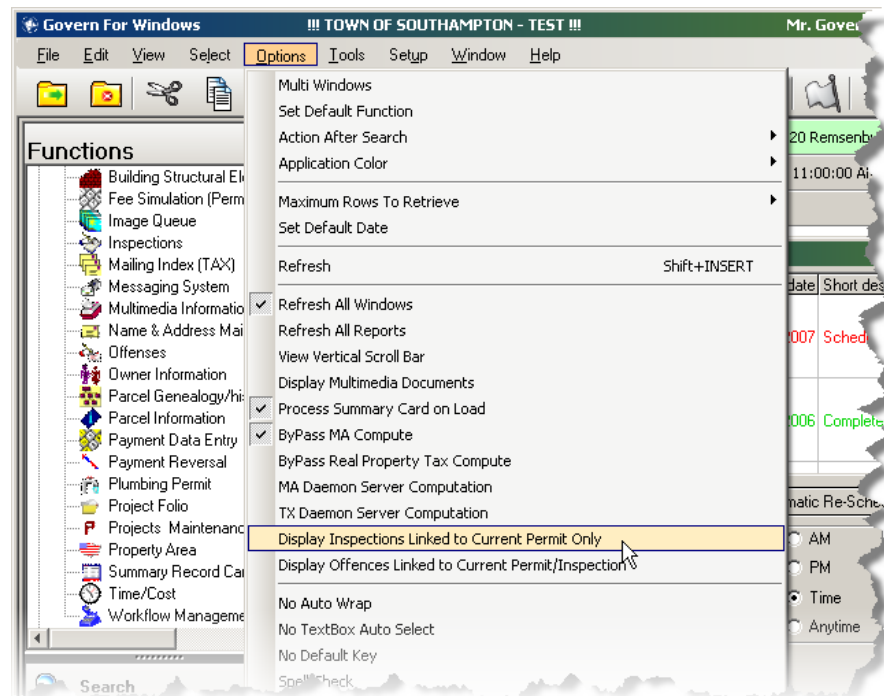
To view and maintain inspection records, you can use one of the following options:

- view all the inspections linked to all permits for the current parcel
- or view only the inspections linked to the current permit

You are able to toggle back and forth between the two options, at any time:

To view only the inspections linked to the current permit:

1. Launch Govern.
2. Select *Options* > **Display Inspection Linked to Current Permit Only**.

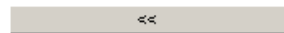
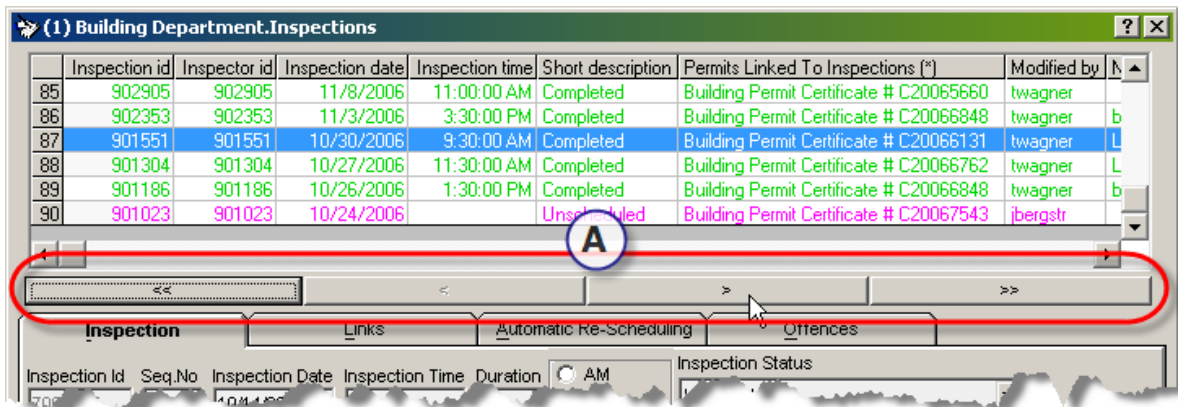


3. To display all the inspections linked to the current parcel, deselect this option.

**Note:** This option is available for all Permit functions associated with a P\_ID. This includes Building, Electrical, General, and Plumbing Permits; Animal and Business Licenses; Approvals, Bonds, Decisions, Prosecutions and Appeals.

## Modification to Viewing Inspections in Display Grid

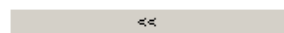
Prior to release 10.5 of *Govern for Windows*, all inspection records were loaded at once. As a result of this, performance issues were observed when there were multiple addresses or permits associated with an inspection. In release 10.5 and greater, the inspections grid are loaded in 200 inspection increments. To facilitate navigation, there are four (4) navigation buttons.



**First** - Click to display the first 200 inspections in the grid.



**Previous** - This will display the previous 200 inspections.



**Next** - Click to displays the next 200 inspections in the grid.



**Last** - Click to display the last 200 records. For example, if you have 202 inspections in the grid, when you click *Last*, the grid will display inspection #201 and #202.

**Note:** The navigation buttons will not be active until there are more than 200 inspection records, i.e. 201 or more.

## Modifying an Inspection Generated from a System Activity

Two types of inspections can be generated from an activity, scheduled and unscheduled. The main difference is that for the Unscheduled Inspection, the date and time are undefined.

### Modifying an Automatically Generated Inspection

For an Automatically Scheduled Inspection, the following parameters are automatically completed:

- Inspection ID
- Inspection Date and Time
- Inspection Status

**Inspection ID:** The inspection ID is automatically generated and cannot be modified. This is the primary key in the PM\_INSPECTIONS table. By default, it appears on the Browse screen and can be used as a criterion on the Inspections Search function.

**Inspection Date:** For an automatically scheduled inspection, this field displays the date. By default, inspections are sorted by inspection date on the browsing screen. To sort by an alternate field, select the column and click **Sort**.

**Inspection Time:** For an automatically scheduled inspection, these fields display the starting time and duration of the inspection.

**Note:** The **Inspection Date** and **Time** fields cannot be modified manually. To update these fields, use the Inspection Scheduling screen. See *Scheduling an Inspection on page 102*.

**Inspection Status:** This field displays Scheduled for an automatically scheduled inspection.

**The inspection status can be defined as:** Completed, Scheduled, Unscheduled or Voided (Table: VT\_SY\_ NSTAT):

- **Scheduled** is automatically selected, once the inspection is scheduled, either manually or from an activity, when **Automatic Inspection Scheduling** - is selected in Govern Admin.
- **Unscheduled** is automatically selected for an inspection generated from an activity when **Unscheduled Inspection** is selected in Govern Admin.
- Select **Voided** to nullify the inspection. A record is kept of the voided inspection and it can be displayed on reports.
- Select **Completed** when the inspection is completed.

**Note:** When the Inspection Status is set to Completed, you need Full Access Rights to the function in order to change the status.

Without Full Access Rights, you can modify only the Notes & Comments fields and the Inspection Type and Description.

*Refer to the Super User guide for details on user access rights.*

**Inspector:** The inspector is automatically assigned and displayed in this field if the *Automatically Assign an Inspector* option is selected on the *Permit Parameters* form in Govern Admin.

The inspector is assigned, according to:

- **Inspection Territory;** i.e., the inspection territory defined for the parcel on the Property Area function is the same as the territory assigned to the inspector on the Inspector's Schedule form in Govern Admin.
- **Availability;** i.e., the inspector is available to perform the inspection, at the time defined in the activity setup, such as the initiation or completion of activity
- **Inspection Type** if the By Inspection Type option is also selected on the Permit Parameters form.

Otherwise, if the **Automatically Assign an Inspector** option is not selected, you need to select an inspector. See *Scheduling an Inspection on page 102 for details*.

**Inspection Types:** If an Inspection Type was automatically assigned to the inspection, through the *Permit System Activities* form in *Govern Admin*, it is automatically selected. Otherwise, you need to select the inspection type. See *Selecting the Inspection Types on page 98 and Scheduling an Inspection on page 102*.

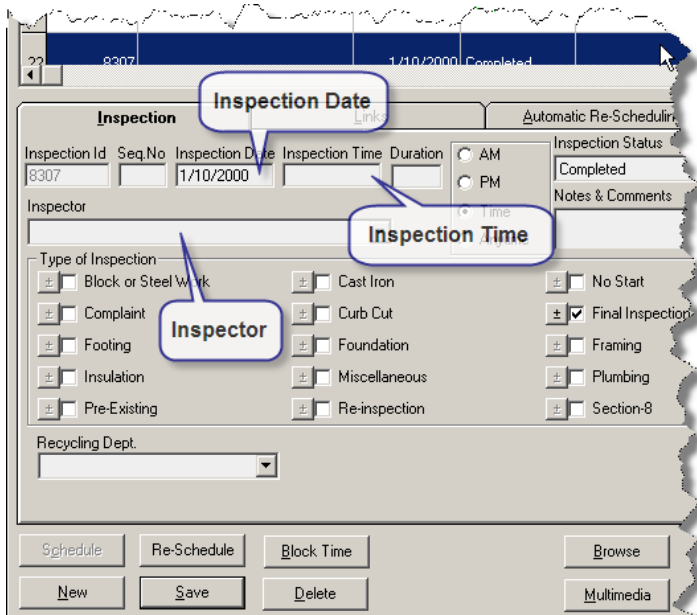


## Modifying an Unscheduled Inspection

For an Unscheduled Inspection, automatically generated from an activity, the following parameters are automatically completed:

- Inspection ID
- Inspection Status

The Inspection **Date**, **Inspection Time** and **Inspector** fields are left blank.



The screenshot shows a web-based form for managing inspections. At the top, a table lists existing inspections with columns for ID, Seq.No, Date, Time, Duration, and Status. Below this, the 'Inspection' form is displayed. It includes fields for 'Inspection Id' (8307), 'Seq.No', 'Inspection Date' (1/10/2000), 'Inspection Time', 'Duration', 'AM/PM' radio buttons, 'Inspection Status' (Completed), and 'Notes & Comments'. A section for 'Type of Inspection' contains checkboxes for various categories like Block or Steel Work, Complaint, Footing, Insulation, Pre-Existing, Cast Iron, Curb Cut, Foundation, Miscellaneous, Re-inspection, No Start, Final Inspection, Framing, Plumbing, and Section-8. A 'Recycling Dept.' dropdown menu is also present. At the bottom, there are buttons for 'Schedule', 'Re-Schedule', 'Block Time', 'Browse', 'New', 'Save', 'Delete', and 'Multimedia'. Callout boxes highlight the 'Inspection Date', 'Inspection Time', and 'Inspector' fields, which are currently blank.

**Inspection ID:** The inspection ID is automatically generated and cannot be modified. See *Inspection ID* on page 86, for further details.

**Inspection Date and Time:** For an *Unscheduled Inspection*, the current date is automatically entered in the Inspection Date field. You cannot modify the Inspection Date and Time fields manually. To update these fields, open the Inspection Scheduling screen. See *Scheduling an Inspection* on page 102.

**Inspection Status:** For an Unscheduled inspection generated through an activity, this field is set to Unscheduled. It changes to Scheduled, once you select the inspector and inspection date and time. You can change this field to Completed or Voided. See *Inspection Status* on page 73, for details.

**Inspection Type:** If an Inspection Type was assigned to the inspection, through the Permit System Activities form in Govern Admin, it is automatically selected. Otherwise, you need to select the inspection type, manually. See *Selecting the Inspection Types on page 76* and *Scheduling an Inspection on page 102*.

## Creating a New Inspection

To create a new inspection:

1. Launch the Inspections function and click **New**.
  - The **Exit** button changes to **Cancel** so that you can delete any unsaved information without closing the function.
  - An *Inspection ID* is automatically assigned. See *Inspection ID on page 72*, for further details.
  - The **Inspection Status** is set to *Unscheduled*. See *Inspection Status on page 73*, for further details.
2. Select the Inspection Types, as described in the following section.
3. Schedule the inspection, as described in *Scheduling an Inspection on page 102*.
4. Click **Save**.

## Selecting the Inspection Types

The Inspection Types are defined in *Govern Admin*, by department, and are used to describe the inspection; for example, framing, insulation, landscaping, water or damage. They can be assigned to an inspector, on the *Inspector's Schedule* form or selected when setting up automatic inspection scheduling, on the *Activities* form in *Govern Admin*.

All the Inspection Types created by the department are listed on the Inspections function (Table: VT\_ USR\_INSPECT). The Inspection Types defined for the selected inspector appear in black, the others in red. However, you can select any Inspection Type, when scheduling an inspection.

**Note:** You can select any number of inspection types for an inspection; however, If one or more inspection types are to be performed by a different inspector, you need to create a new inspection record. You can schedule both inspectors for the same date and time, if required.

## Defining the Inspection Results by Type

The *Inspection Results* form allows you to specify the results of the inspection type with a series of drop-down menus, and a note field for additional details.

### Inspection Results parameters

**Inspection Status:** Select an inspection status from the drop-down menu; options can include, Passed, Failed, Incomplete, etc. These are user defined codes (Table: VT\_USR\_PMINTYST).


**Reason Code:** Select a legislative reason code for the inspection (Table: VT\_USR\_PMINTYRE).

**Inspection Codes:** Select the applicable inspection codes from the drop-down menu; codes that are present may be removed by selecting them. When highlighted, click **R** to remove them.

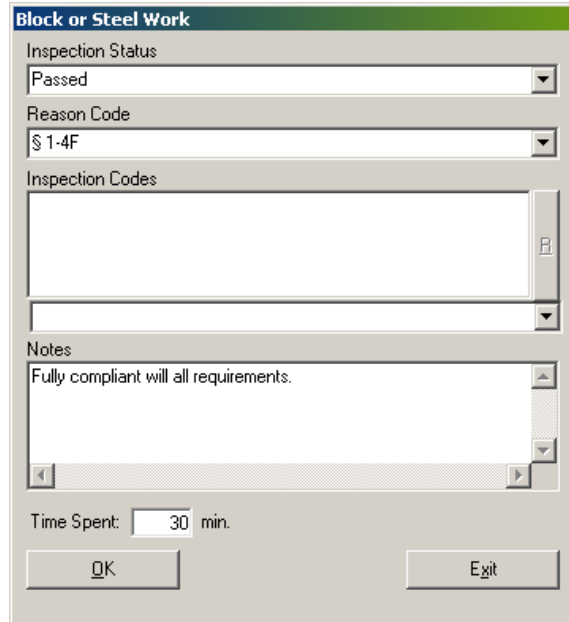
**Notes:** Enter any notes that may be relevant to the inspection in the Notes parameter.

**Time Spent:** Enter the time spent for performing the inspection. This information is saved in a new field (TIME\_SPENT) in the PM\_LK\_INSP\_TYPE table. For planning purposes, a report may be generated to help determine the average time used for the inspection type.

To select an inspection type, on the Inspections function:

1. Select the check box beside the type. This enables the  button.

- Click this button to enter the results of the inspection; i.e., the *Inspection Status*, *Reason Code* and any notes for the *Inspection Type*.



- Select the **Inspection Status** code. These codes are user-defined and describe how the inspector rates the Inspection Type; such as passed, failed, incomplete or complete (Table: VT\_USR\_PMINTYST).
- Select a Reason Code, from the drop-down list (Table: VT\_USR\_PMINTYRE), to justify the evaluation.

**Note:** A fee can be associated with the Reason Code, in Govern Admin.

- Enter notes and comments for the selected type of inspection. This field provides unlimited space.
- Click **OK** to save the Inspection Type record or **Cancel** to return to the Inspections function without saving.

**Note:** If you deselect an Inspection Type, the entire record of the Inspection Type is removed. A confirmation message is displayed, beforehand.

If a fee has been associated with the selected Reason Code in Govern Admin, the following screen appears. The default fee is displayed in the text box.

7. Modify this amount, if required, and click **OK** to save. The *Fee Distribution* screen will appear.

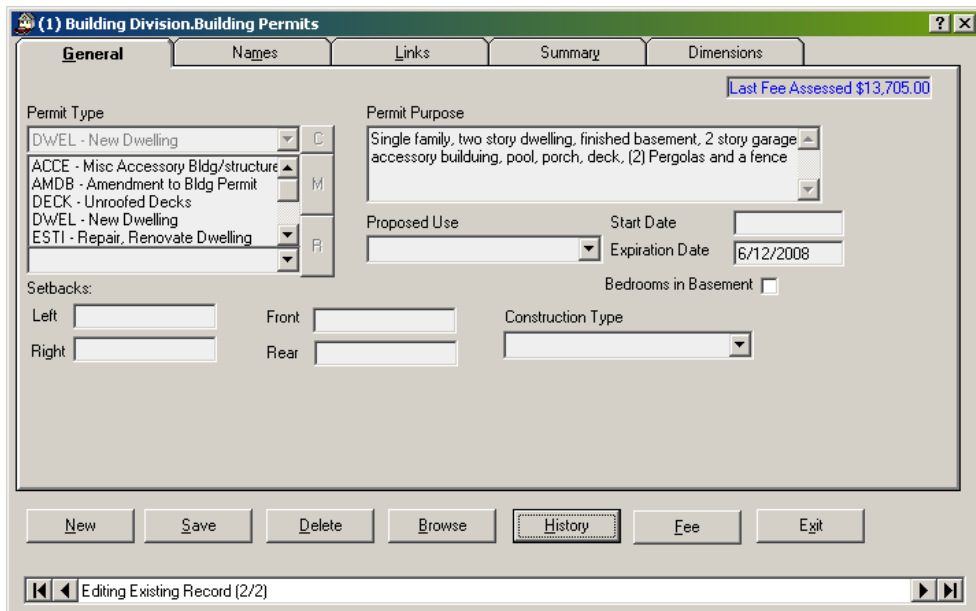


The **Fee Distribution Override** dialog box contains the following fields and controls:

- Fee Description:** A text input field.
- Total Fee:** A numeric input field with the value 50.
- Fee Description, G/L Account, Amount:** A table with three columns. It contains two rows:
 

Fee Description	G/L Account	Amount
	D	\$50.00
	C	\$50.00
- Total Fee \$50.00:** A label at the bottom of the table.
- OK:** A button at the bottom left.

8. Enter a description for the fee, if required and click OK. The fee is displayed on the General tab of the applicable *Permit* function.0



The **(1) Building Division Building Permits** window shows the **General** tab with the following details:

- Permit Type:** DWEL - New Dwelling
- Permit Purpose:** Single family, two story dwelling, finished basement, 2 story garage accessory building, pool, porch, deck, (2) Pergolas and a fence
- Proposed Use:** [Dropdown menu]
- Start Date:** [Text field]
- Expiration Date:** 6/12/2008
- Bedrooms in Basement:** ☐
- Setbacks:**
  - Left: [Text field]
  - Front: [Text field]
  - Right: [Text field]
  - Rear: [Text field]
- Construction Type:** [Dropdown menu]
- Last Fee Assessed \$13,705.00:** A label in the top right corner.
- Buttons:** New, Save, Delete, Browse, History, Fee, Exit.
- Status Bar:** Editing Existing Record (2/2)

9. To view details on the fee, select History, on the Permit function.

Totals	Date	G/L Account	Amount	User	Notes	A/R Class	Fee Description	Fee Override
			# 27195					
1	11/15/2005	12.1560.001.1	13291.5	lawles	Step # 10, Type dwel			0
2	8/10/2007	12.1560.001.1	198	lawles	Fee adjusted by the operator		amendment	-1
3	8/10/2007	12.1560.001.1	-198	lawles	Fee adjusted by the operator			-1
4	8/10/2007	12.1560.001.1	198.5	lawles	Fee adjusted by the operator			-1
5	8/13/2007	12.1560.999.1	13705	lawles	Step # 430, Type dwel			-1

## Inspections



The following details are displayed for all fees associated with the permit:

- **Totals:** the payment record.
- **Date:** the last fee date of the payment.
- **G/L Account:** the G/L account number entered on the Permit Type, Activity Steps or Permit Parameters form in Govern Admin
- **User:** the name of the user who entered the payment
- **Notes:** a system-generated message; for inspections, this is Fee Generated from Inspection
- **A/R Class:** the A/R class entered on the Permit Type, Activity Steps or Permit Parameters form in Govern Admin
- **Fee Description:** the Fee Description defined in Govern Admin for the organization, department, permit type or activity step. This description can be modified on the Fee Distribution Override form.
- **Fee Override:** the override amount entered on the Fee Distribution Override form, if applicable.

## Scheduling an Inspection

To schedule an unscheduled inspection or to make modifications to a scheduled inspection; click *Schedule* on the Inspections function to display the *Inspection Scheduling* screen.

**Inspection Scheduling**

*Friday, February 29, 2008*

8:30 a	9:30 a	10:30 a	11:30 a	1:30 p	2:30 p	3:30 p	4:30 p
8:35 a	9:35 a	10:35 a	11:35 a	1:35 p	2:35 p	3:35 p	4:35 p
8:40 a	9:40 a	10:40 a	11:40 a	1:40 p	2:40 p	3:40 p	4:40 p
8:45 a	9:45 a	10:45 a	11:45 a	1:45 p	2:45 p	3:45 p	4:45 p
8:50 a	9:50 a	10:50 a	11:50 a	1:50 p	2:50 p	3:50 p	4:50 p
8:55 a	9:55 a	10:55 a	11:55 a	1:55 p	2:55 p	3:55 p	4:55 p
9:00 a	10:00 a	11:00 a		1:00 p	2:00 p	3:00 p	4:00 p
9:05 a	10:05 a	11:05 a		1:05 p	2:05 p	3:05 p	4:05 p
9:10 a	10:10 a	11:10 a		1:10 p	2:10 p	3:10 p	4:10 p
9:15 a	10:15 a	11:15 a		1:15 p	2:15 p	3:15 p	4:15 p
9:20 a	10:20 a	11:20 a		1:20 p	2:20 p	3:20 p	4:20 p
9:25 a	10:25 a	11:25 a		1:25 p	2:25 p	3:25 p	4:25 p

Inspector: Patricia Raymond  
Inspector's Territory: Town of Mount Royal

February 2008

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	

OK Location Exit

Inspection Type(s): Commercial Land Change Field Inspection

The *Inspection Scheduling* screen is divided into two panes. From the right pane, you can select the inspector, inspection territory and the inspection

date. From the left pane, you can select the inspection starting and ending times, verify the inspection types and verify the location.

**Note:** You can specify exact starting and ending times for the inspection or specify only that the inspection take place in the morning (AM), afternoon (PM) or at some point during the selected day (Anytime).

### Selecting or Assigning the Inspector

1. Select an inspector from the **Inspector** drop-down list.

**Note:** You can also select the inspector on the Inspections function.

2. Select the territory from the **Inspector's Territory** drop-down list.

## Inspection Sequencing

*Governs* Inspection Scheduling feature is quite powerful with its validation of resources, i.e. inspectors, allocated time, and control of the routing of the inspection.

When scheduling an inspection one factor that needs to be taken into account is the travel time for an inspector from one location to the next. If travel time is not factored in, then scheduling becomes ineffective. For example, it makes no sense to schedule a 10 minute inspection for an inspector at 10:00 AM, then schedule another one for 10:20 AM across town, then finally one for 10:40 half way between the first and second destination.

Use the *Inspection Sequence* number to specify an order, or “route” that the inspector should travel in, thereby optimizing the usage of available time. To specify a **Sequence Number** (Table: PM\_INSPECTIONS)...

1. Open a record with an inspection, or one that you would like to schedule an inspection for.
2. Select the *Inspections* function from the *Side Navigation Bar* (SNB).
3. Create a new inspection or select an existing one.

## Inspections



4. In the *Inspections* form, click in the **Sequence No** parameter and enter a sequence number, i.e. the order number that the inspection will travel in.

Inspection Id	Permits Linked To Inspections (*)	Inspection date	Short description	Notes & Comments	Name And Address (*)
3	136057	6/9/2009	Scheduled		Dennis O'Rourke Building Inspector NY
4	136056	6/9/2009	Scheduled		Dennis O'Rourke Building Inspector NY

Inspection
Links
Automatic Re-Scheduling
Offences

Inspection Id: 136056
Seq.No: 3
Inspection Date: 6/9/2009
Inspection Time:
Duration:
AM
PM
Time
Anytime
Inspection Status: Scheduled
Notes & Comments:
Status:

Inspector: Dennis O'Rourke
Route No: 4
Type of Inspection:
☐ Block or Street Work
☒ Complaint
☒ Cast Iron
☒ Curb Cut
☒ No Start
☒ Damage Assessment
☒ Show All Types of Inspection

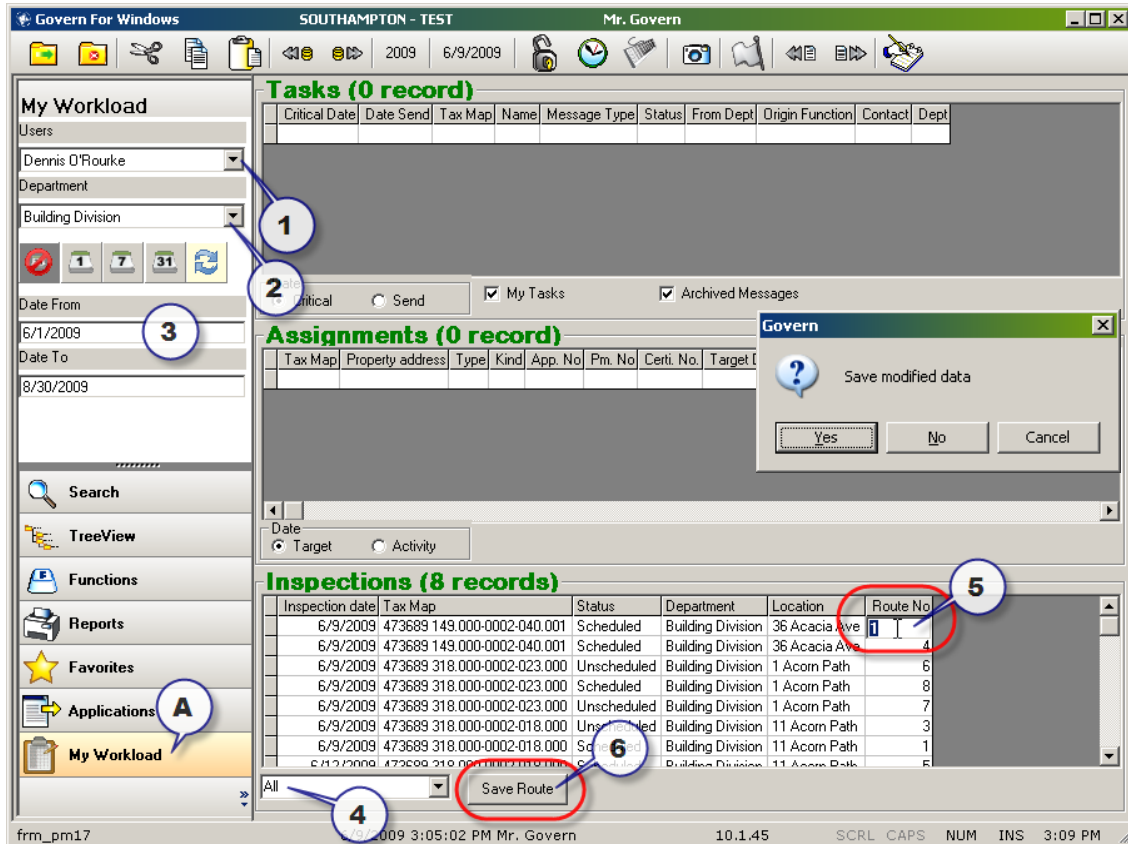
When a sequence has been established, the order of the sequence can be quickly changed through the *My Workload* task manager.

To rearrange the **Sequence...**

1. Click *My Workload* in the *Side Navigation Bar (SNB)*.
2. Select the user and department from the drop-down menu.
3. Specify a range in the date-range field.
4. Choose the parameters in the interface to display the inspections
5. Look for the *Sequence No.* column; click to select and enter the new sequence number.



## 6. Click Save Route.



**My Workload**

Users: Dennis O'Rourke

Department: Building Division

Date From: 6/1/2009

Date To: 8/30/2009

**Tasks (0 record)**

Critical	Date	Send	Tax Map	Name	Message Type	Status	From Dept	Origin Function	Contact	Dept
----------	------	------	---------	------	--------------	--------	-----------	-----------------	---------	------

**Assignments (0 record)**

Tax Map	Property address	Type	Kind	App. No	Pm. No	Certi. No	Target
---------	------------------	------	------	---------	--------	-----------	--------

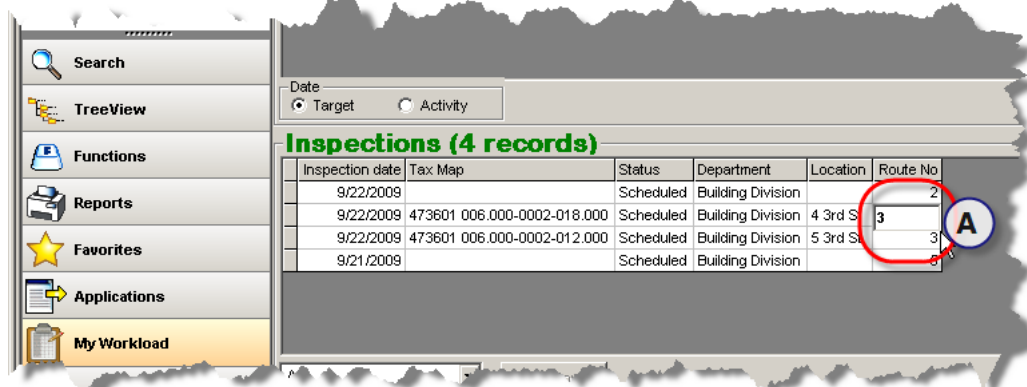
**Inspections (8 records)**

Inspection date	Tax Map	Status	Department	Location	Route No
6/9/2009	473689 149.000-0002-040.001	Scheduled	Building Division	36 Acacia Ave	4
6/9/2009	473689 149.000-0002-040.001	Scheduled	Building Division	36 Acacia Ave	4
6/9/2009	473689 318.000-0002-023.000	Unscheduled	Building Division	1 Acorn Path	6
6/9/2009	473689 318.000-0002-023.000	Scheduled	Building Division	1 Acorn Path	8
6/9/2009	473689 318.000-0002-023.000	Unscheduled	Building Division	1 Acorn Path	7
6/9/2009	473689 318.000-0002-018.000	Unscheduled	Building Division	11 Acorn Path	3
6/9/2009	473689 318.000-0002-018.000	Scheduled	Building Division	11 Acorn Path	1
6/12/2009	473600 210.000-0002-012.000	Scheduled	Building Division	11 Acorn Path	5

Save Route

Save modified data

Yes No Cancel



**Inspections (4 records)**

Inspection date	Tax Map	Status	Department	Location	Route No
9/22/2009		Scheduled	Building Division		2
9/22/2009	473601 006.000-0002-018.000	Scheduled	Building Division	4 3rd S	3
9/22/2009	473601 006.000-0002-012.000	Scheduled	Building Division	5 3rd S	3
9/21/2009		Scheduled	Building Division		4

**Note:** Sequence Number Conflicts, e.g. duplicate sequence numbers, are not resolved by the system. It is the responsibility of the scheduler to ensure that the sequence number is not duplicated.




## Selecting the Inspection Date

By default, the current date is selected on the calendar. It is magenta if the inspector is available or green if the inspector is unavailable.

1. Use the up / down arrows to select another month, if required.
2. Select the day you are scheduling the inspection, on the calendar. The date appears above the time blocks, on the left.

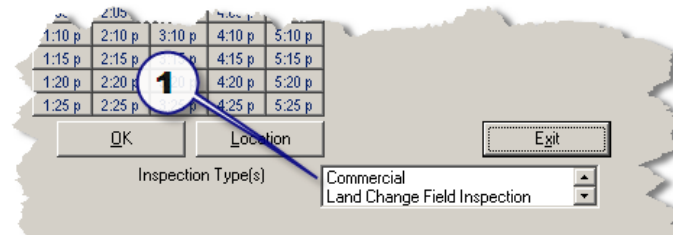
**Note:** You cannot select a date in the past.

The days, on the calendar, are color-coded as follows:

Color		Description
	Cyan	Inspector is available.
	Magenta	Day currently selected for inspection scheduling.
	Green	Inspector is unavailable.

Inspections are sorted by **Inspection Date** on the Browsing screen. To sort by an alternate field, select the column and click **Sort**.

## Verifying the Inspection Types



The inspection types selected for the inspection record are listed, below the time blocks in the left pane. Use the up / down arrows to view the complete list, if required.

## Scheduling the Inspection Time

You can specify the exact starting time and duration of the inspection or specify only that the inspection take place in the morning (AM), afternoon (PM) or at some point during the selected day (Anytime).

## Scheduling an Exact Time for the Inspection

To specify an exact time for the inspection:

1. Once the inspector and date are selected for the inspection, select time blocks for the inspection, from the left pane of the *Inspection Scheduling* screen.

The following conditions apply:

- The inspection time must be a multiple of the **Inspection Units Duration** set on the *Land Management Parameters* in Govern Admin.

Inspection Units Duration





- The inspection must be equal to or greater than the **Inspection Elapse Time (Minutes)** set on the *Inspector's Schedule* in Govern Admin.
- The **Inspection Elapse Time** must be a multiple of the **Inspection Units Duration**

Inspection Elapse Time (Minutes)

- Inspection times include travel times.

**Tip:** The *Inspection Territory* code is included inspections in the same vicinity.

- Inspections must be scheduled at consecutive times. For example, if you schedule an inspection to take place from 8:00 a.m. to 8:30 a.m. and then try to schedule a second inspection at 9:00 a.m., all the time blocks between 8:30 and 9:00 are automatically selected.
- The time blocks are coded as follows:

Color	Key	Description
	Navy	Deselected Time available for Inspection scheduling
	Navy	Selected Inspection scheduled for the selected time.
	Gray	Selected Time unavailable: blocked through the <b>Block Time</b> feature.
	Gray	Selected with Outlook logo Time unavailable: scheduled through <i>Outlook</i> .

2. Click OK to save the scheduling information and return to the Inspections function. The Inspection Date and Time fields are automatically updated (Table: VT\_SY\_INSPAMPM).

### Scheduling an AM, PM or Anytime Inspection

1. To schedule an **AM**, **PM** or **Anytime** inspection:
2. Once the inspector and date are selected for the inspection, return to the *Inspections* screen.



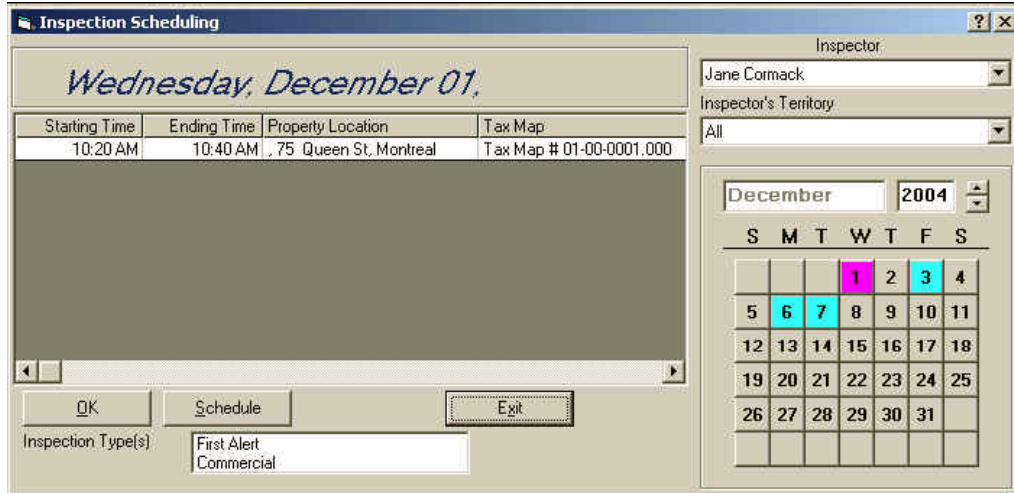
3. Select **AM** to indicate the inspection is to be performed in the morning; **PM** to indicate that it is to be performed in the afternoon or **Anytime** to indicate the inspection is to be performed at an undefined time during the selected day.
4. Click **Save**.

### Verifying the Location

You cannot modify the Location information. It is provided for informational purposes only.

To verify the location of the inspection or inspections:

1. Click Location on the Inspection Scheduling screen.



2. The following details are displayed below the date, in the left pane:
  - Starting and Ending Time of the inspection
  - Property Location
  - Tax Map Number
3. The caption on the **Location** button changes to **Schedule**. Click this button to return to the *Scheduling* screen.

## Enhanced Inspection Scheduling Interface

An alternate inspector scheduling form was introduced in *Govern for Windows 10.5*. When this alternate display option is selected, the inspectors schedule for a selected day will be displayed in a new format that allows you to quickly view the manage scheduled inspections.

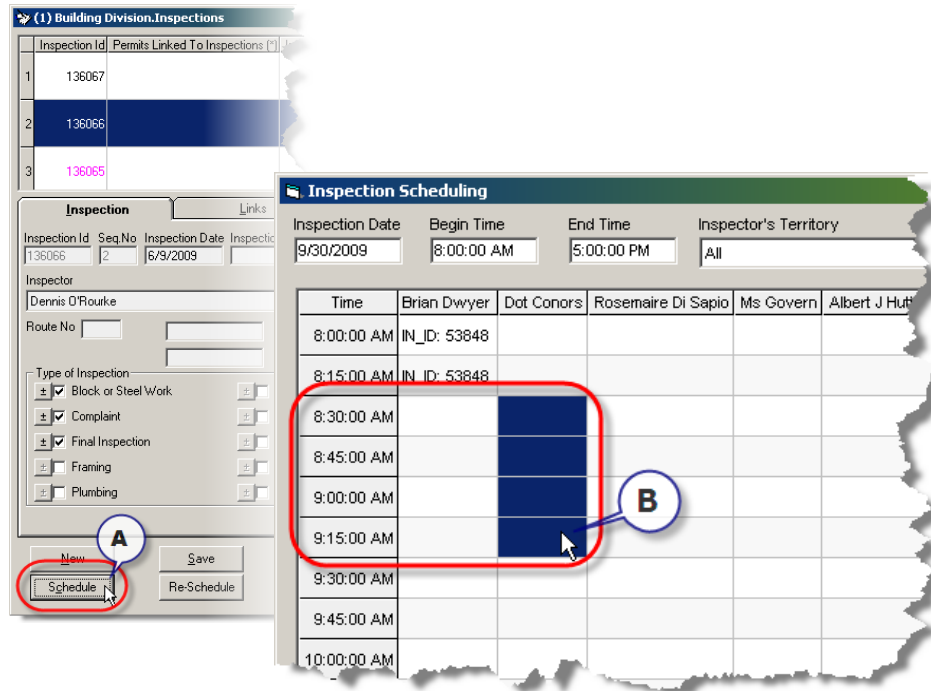
**Note:** Due to the functioning of the Enhanced Inspection Scheduling Interface, when the Light Inspection Scheduling option is enabled, this option is disabled. *For details on Light Inspection Scheduling, see Light Inspection Scheduling on page 112.*

To enable the *Enhanced Inspection Scheduling Interface*...:

*In Govern for Windows.*

1. Select *Options > All Inspectors Scheduling*.

- Open an inspection record and click **Schedule** on the *Inspections* form.



The screenshot displays two overlapping windows. The background window is titled '(1) Building Division.Inspections' and contains a table of inspection records. The foreground window is titled 'Inspection Scheduling' and features a form at the top for specifying inspection details (Date, Begin Time, End Time, Inspector's Territory) and a grid below for scheduling. In the 'Inspection' window, the 'Schedule' button is circled in red and labeled with a blue circle 'A'. In the 'Inspection Scheduling' window, a time slot at 8:30:00 AM for Inspector Brian Dwyer is highlighted in blue and labeled with a blue circle 'B'.

Time	Brian Dwyer	Dot Conors	Rosemaire Di Sapio	Ms Govern	Albert J Hut
8:00:00 AM	IN_ID: 53848				
8:15:00 AM	IN_ID: 53848				
8:30:00 AM					
8:45:00 AM					
9:00:00 AM					
9:15:00 AM					
9:30:00 AM					
9:45:00 AM					
10:00:00 AM					

- The new inspection scheduling interface will be displayed.

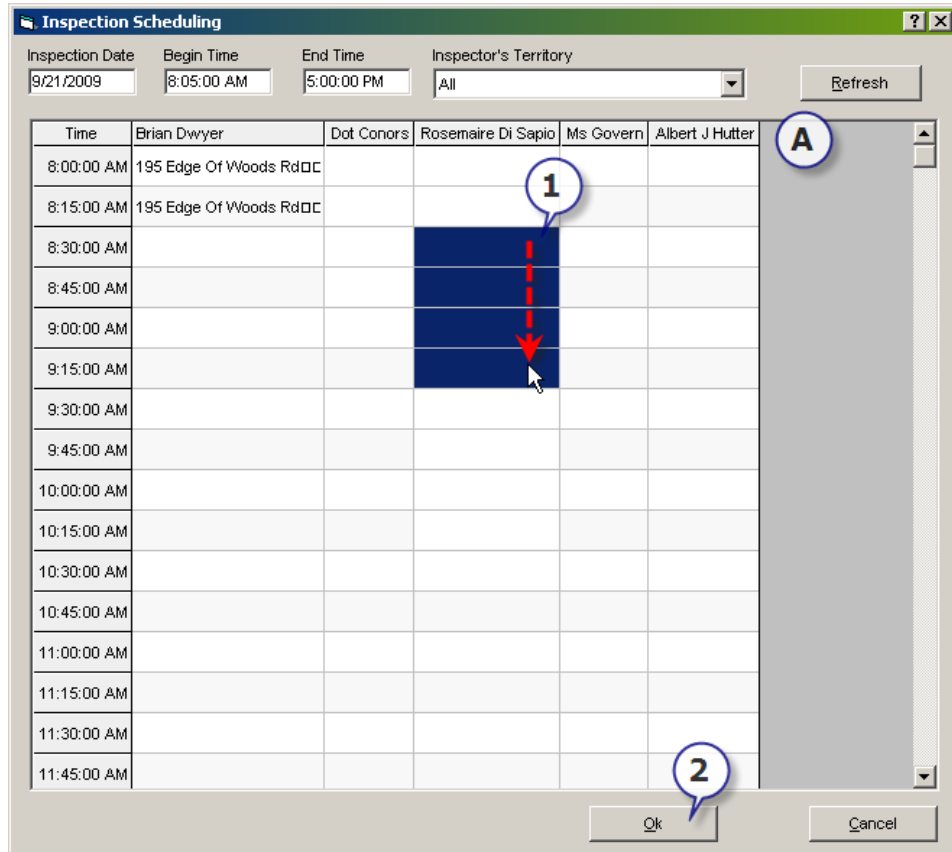
**Note:** To return to the previous interface, de-select the **All Inspectors Scheduling** option from the menu.

This new interface allows you to, at a glance, view inspectors and schedule a time in an easy to select grid.

To schedule a time in the *Inspection Scheduling* grid...

- Open a record, and select the **Inspection** function in the *Side Navigation Bar* (SNB).
- Click **New** to create a new inspection in the *Inspections* form.
- Open the *Inspection Scheduling* grid; click **Schedule**.
- In the *Inspection Scheduling* form, you can specify the date, and the **Begin** and **End Times**.
- Locate the column with the name of the inspector that you would like to schedule a time for.

6. Click in the grid to select a time; if you require a longer period, click further down the column at the required end time.
7. Click **OK**.



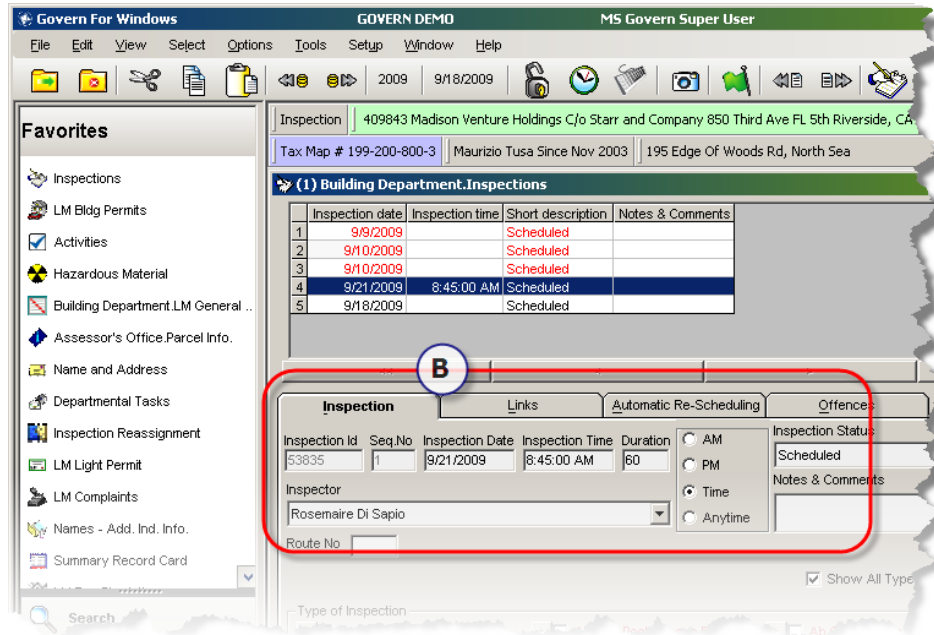
Time	Brian Dwyer	Dot Conors	Rosemaire Di Sapia	Ms Govern	Albert J Hutter
8:00:00 AM	195 Edge Of Woods Rd				
8:15:00 AM	195 Edge Of Woods Rd				
8:30:00 AM					
8:45:00 AM					
9:00:00 AM					
9:15:00 AM					
9:30:00 AM					
9:45:00 AM					
10:00:00 AM					
10:15:00 AM					
10:30:00 AM					
10:45:00 AM					
11:00:00 AM					
11:15:00 AM					
11:30:00 AM					
11:45:00 AM					

Ok Cancel

## Inspections



When the time and the inspector is scheduled, the information under the Inspection tab is also updated.



## Light Inspection Scheduling

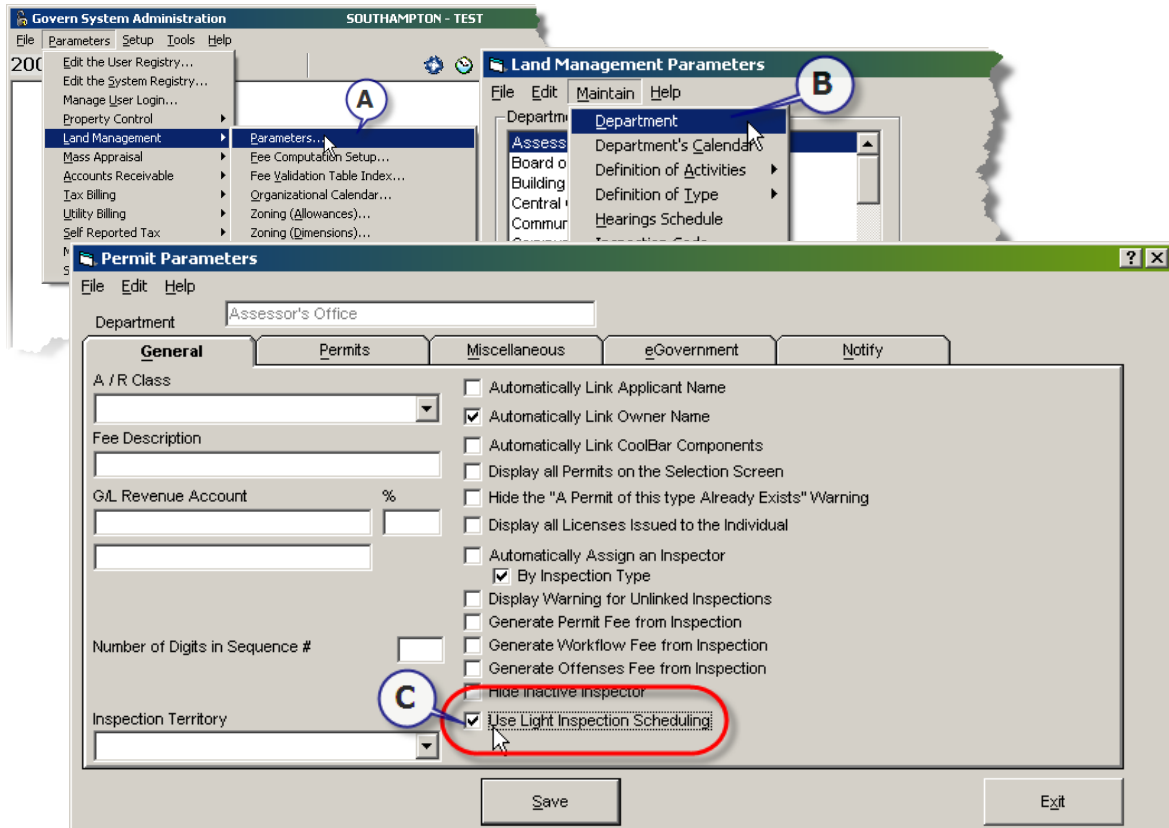
A key feature of the *Govern Inspection* scheduling system is its ability to verify whether an inspection can occur without conflicts in time and resource. There are times when you may need to schedule on an “as needed” basis. These are the times that you will not necessarily require the system to validate for timing and or resource, you just want to schedule it in the system.

The *Light Inspection Scheduling* allows you to indicate scheduled times that bypass the scheduling restrictions that prevents conflicts in date and time. This would be the electronic equivalent of a sticky note reminder with a time written on it.



## Using the Light Scheduling feature

In order to use the *Light Inspection Scheduling* feature, it must first be enabled in *Govern Admin...*



1. Select *Parameters > Land Management Parameters*.
2. In the **Land Management Parameters** form, select a department from the *Department* group; select *Maintain > Department*.
3. When the Permit Parameters form is displayed, select **Use Light Inspection Scheduling**.

**Note:** When this option is enabled, you will not be able to use the *Enhanced Inspection Scheduling Interface*. See *Enhanced Inspection Scheduling Interface* on page 109.

In *Govern for Windows*, we now have the option of creating a *Light Inspection*. To create a *Light Inspection* in *Govern for Windows*...

## Inspections



1. Open a parcel that you need to schedule an inspection for.
2. In the *Side Navigation Bar* (SNB), click **Functions**.
3. Under the *Functions* pane, select **Inspections**.
4. In the *inspections* form, click **New**.
5. Click **Schedule** to display the *Inspection Scheduling* form.
6. In Inspection Scheduling form verify the date, select a time, or click *Specific Time*, to enter a time in the parameter.

The screenshot shows the 'Inspection Scheduling' form. Callout A points to the 'Inspection date' field in the table. Callout B points to the 'Time Requested' section in the 'Inspection Scheduling' dialog box.

Inspection Id	Permits Linked To Inspection	Inspection date	Short description	Notes & Comments	Name And Address (*)
136014		9/25/2009	Scheduled		Govern software Montreal, Qc Canada
136010		9/21/2009	Scheduled		William White Building Inspector Ny
136006		12/17/2008	Unscheduled		William White

**Inspection Scheduling**

Inspection Date: 9/25/2009

Time Requested:

- ☐ Anytime
- ☐ AM
- ☐ PM
- ☒ Specific Time: 11:30

Inspector: [Dropdown]

Buttons: Ok, Cancel

7. An Inspector may be selected from the drop down list.
8. Click **OK**.

**Note:** The *Time Requested* and *Inspector* information are optional for the Light Inspection because none of the information is validated, the information is merely displayed. It is the responsibility of the scheduler to verify that inspection dates and times entered are not conflicting.

---

## Link Offense / Violations to Inspections

When *Offenses / Violations* are discovered during an inspection, you are able to link them through a functionality that is similar to that of Code violations. *Violations / Remedies* for the offences are defined in Admin.

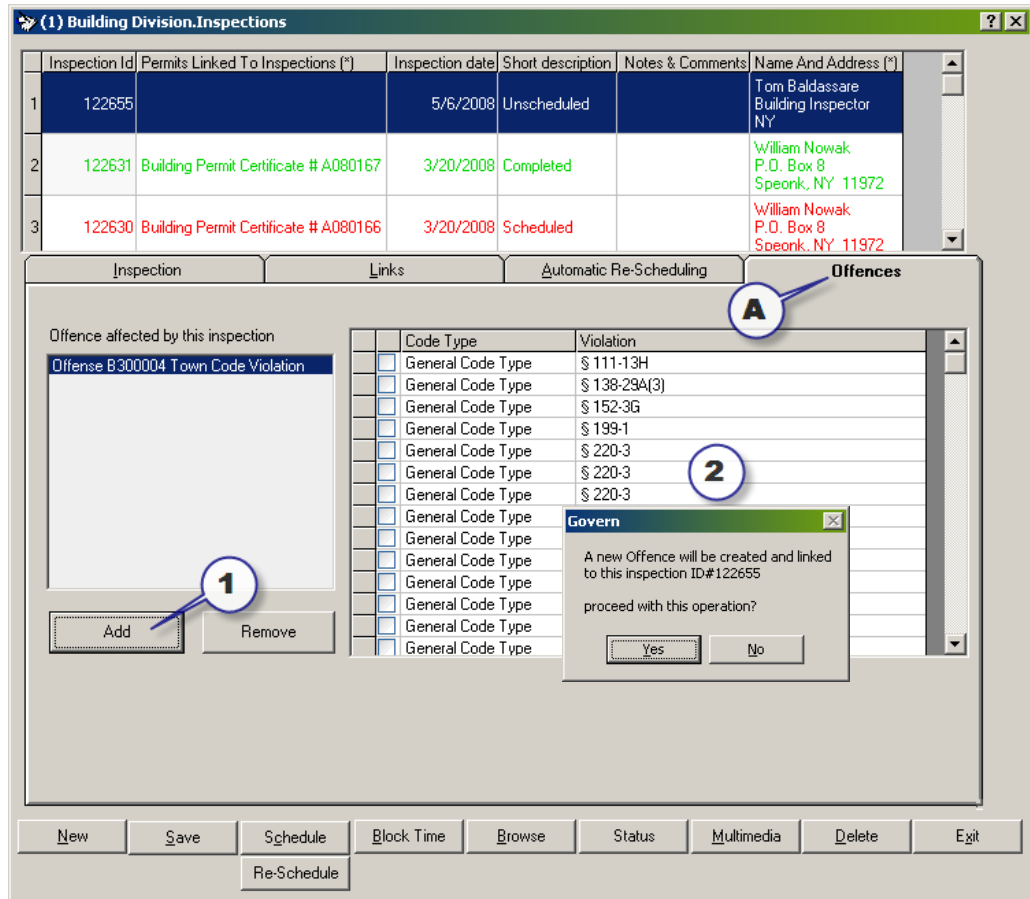
In *Govern for Windows* a new tab has been added that displays this new functionality. Under the tab, a grid for each inspection type will be displayed that will allow you to add an offense type. Once an offense has been selected, all the violations attached to that offense will be displayed. The inspector should be able to check any violation and once checked the offense will be automatically created.

Go to *Govern Admin* and follow the steps to create any required Offenses / Violations. In *Govern for Windows* when these inspection types are selected, the **Offenses** tab will display the associated offense types. See *Define Violations / Remedies for Offences on page 22*.

To link a violation to an offense in *Govern for Windows*:

1. Open a record; select the *Inspections* function.
2. Create and schedule a new inspection.

### 3. Select the **Offenses** tab.



The screenshot shows the 'Building Division.Inspections' application window. At the top, there is a table with columns: Inspection Id, Permits Linked To Inspections (\*), Inspection date, Short description, Notes & Comments, and Name And Address (\*). The table contains three rows of inspection data.

Below the table, there are four tabs: Inspection, Links, Automatic Re-Scheduling, and **Offences**. The 'Offences' tab is selected. It contains a list of offenses with columns: Code Type and Violation. A list of offenses is shown, including 'Offense B300004 Town Code Violation'.

At the bottom of the 'Offences' tab, there are 'Add' and 'Remove' buttons. A dialog box is open, asking for confirmation to create a new offense and link it to the inspection ID#122655. The dialog box has 'Yes' and 'No' buttons.

At the bottom of the application window, there are buttons: New, Save, Schedule, Block Time, Browse, Status, Multimedia, Delete, and Exit. A 'Re-Schedule' button is also present.

You can select Offenses / Violations that were uncovered as a result of the inspection.

## Outlook Scheduling

If Outlook Scheduling is enabled and:

- If **AM**, **PM** or **Anytime** is selected for the inspection, a task is added to the Inspector's Microsoft® Outlook® Task List, for the selected date. No time is specified.
- If an exact time is scheduled for the inspection, an appointment is created in the Inspector's Outlook Calendar for the selected date and time.
- If the inspection record is modified, an e-mail is sent to inform the inspector.

See *Integrating Govern with Outlook* on page 48 for details on enabling Outlook Scheduling.

## Outlook Scheduling Procedure

When you click **OK** on the Inspection Scheduling screen, the Inspector's Microsoft® Outlook Calendar is verified and the following confirmation message is displayed.



**Note:** This message and similar confirmation messages appear, whenever Outlook is accessed by an external application. These are designed, for security reasons, to inhibit the spread of viruses.

**Note:** To reduce the number of Outlook pop-ups, open Outlook before using the Inspections function and leave it open while you are scheduling inspections.

*For more information refer to the following web page:*

<http://support.microsoft.com/default.aspx?scid=KB;EN-US;Q262634>.

1. Select the **Allow access for** option.
2. Select a time period from the drop-down list. For example, in the preceding screen shot, of the Outlook Confirmation message, ten minutes is selected; this provides a maximum of ten minutes access to the inspector's Outlook calendar.

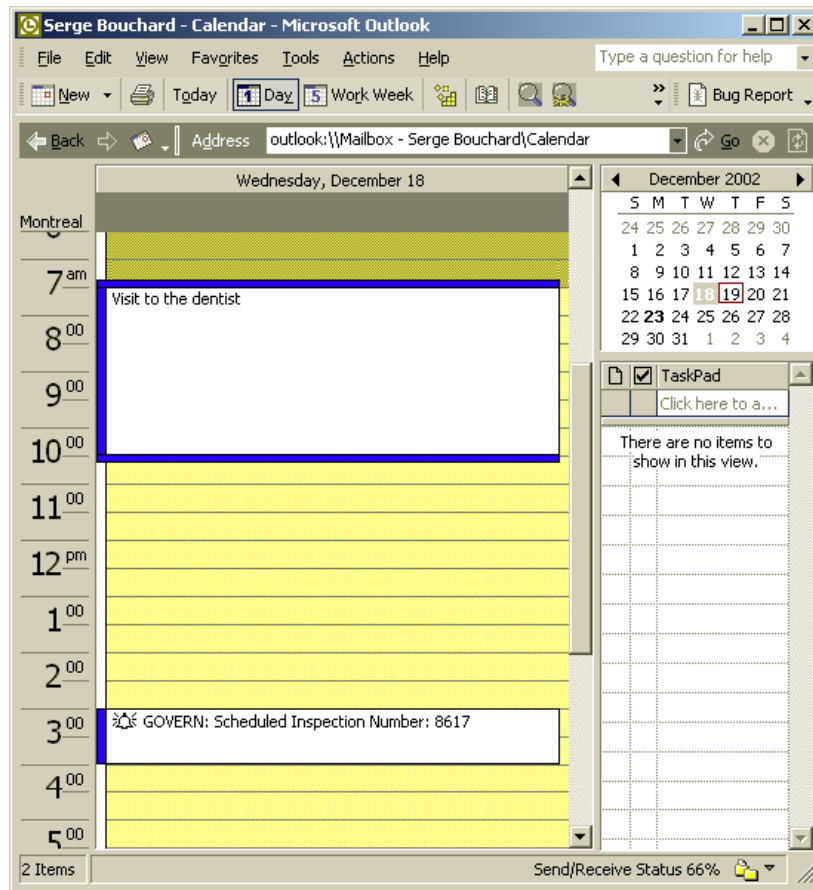
## Inspections



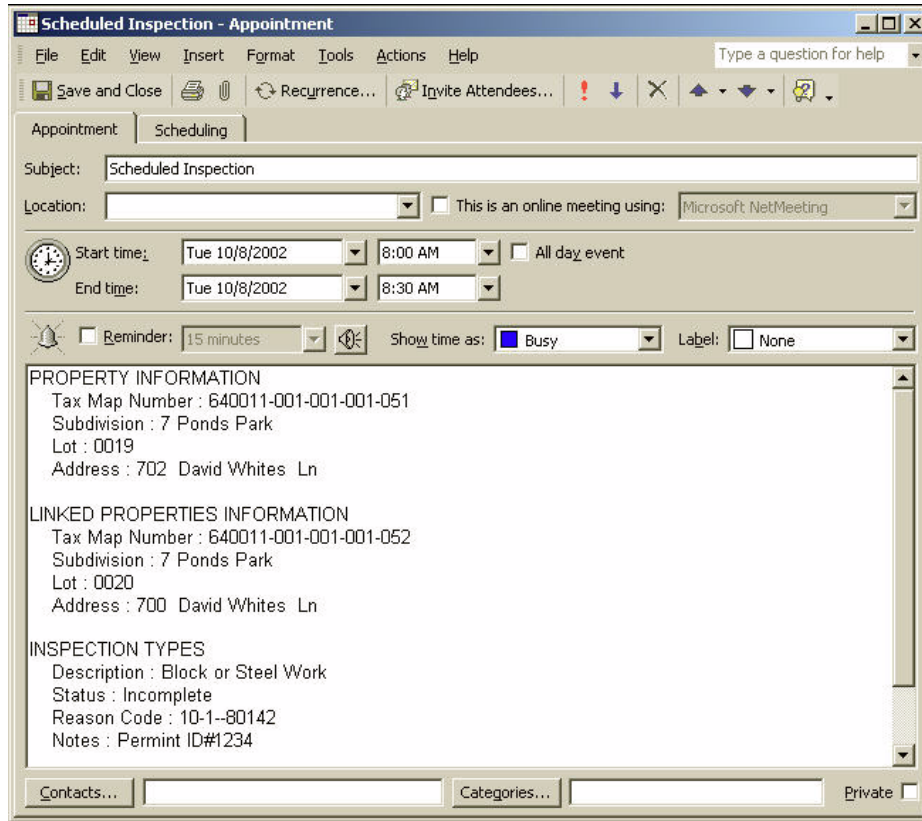
- Click **Yes** to apply the setup and return to the *Inspection Scheduling* form. A confirmation message is displayed to indicate the Inspector's Outlook application is updated.



The inspection appears as an appointment in the Inspector's Outlook *Calendar*.



**Note:** All inspections are added to the Inspector's Task List, including those classified as **AM**, **PM** or **Anytime**.



**Scheduled Inspection - Appointment**

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Invite Attendees...

Appointment | **Scheduling**

Subject: Scheduled Inspection

Location: This is an online meeting using: Microsoft NetMeeting

Start time: Tue 10/8/2002 8:00 AM All day event

End time: Tue 10/8/2002 8:30 AM

Reminder: 15 minutes Show time as: Busy Label: None

**PROPERTY INFORMATION**  
 Tax Map Number : 640011-001-001-051  
 Subdivision : 7 Ponds Park  
 Lot : 0019  
 Address : 702 David Whites Ln

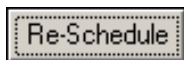
**LINKED PROPERTIES INFORMATION**  
 Tax Map Number : 640011-001-001-052  
 Subdivision : 7 Ponds Park  
 Lot : 0020  
 Address : 700 David Whites Ln

**INSPECTION TYPES**  
 Description : Block or Steel Work  
 Status : Incomplete  
 Reason Code : 10-1--80142  
 Notes : Permint ID#1234

Contacts... Categories... Private

When you right-click on the Outlook appointment, details of the inspection are displayed.

## Rescheduling an Inspection



If one or more inspection types are incomplete, you can use the **Reschedule** button to schedule the inspection for the next available date and time.

**Note:** This creates a new Scheduled inspection record, for the next available date and time on the Inspector's Schedule.

**Tip:** To schedule inspections that need to be performed on a regular basis; for example, every two weeks, use the Automatic Rescheduling tab and batch process. See *Setting Up Automatic Rescheduling on page 128*.

To reschedule an inspection that the inspector was unable to perform on the originally schedule day, open the Inspection Scheduling screen and reschedule the inspection, manually. See *Scheduling an Inspection on page 102*

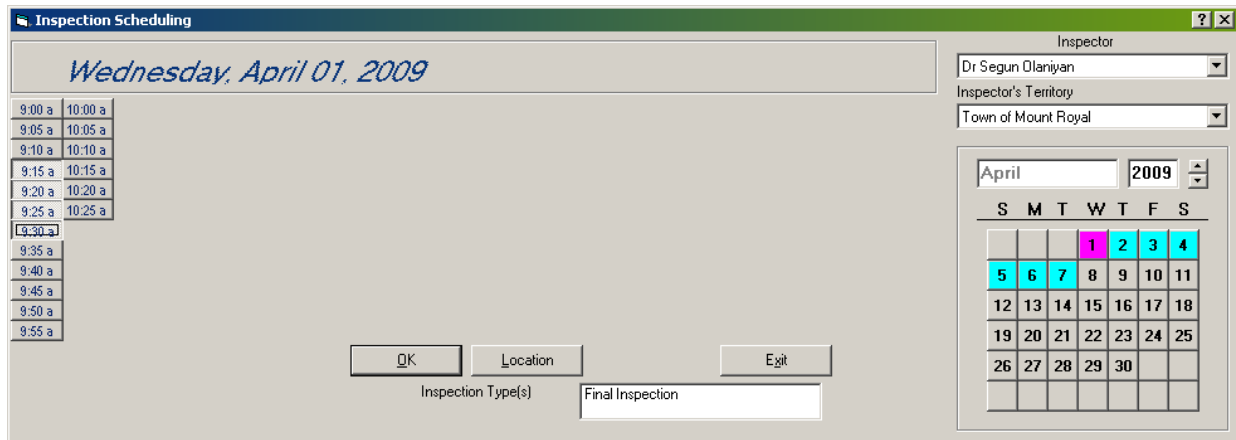
## Blocking Time for an Inspector

You can indicate an inspector is not available during a time normally scheduled for inspections, by using the Block Time feature and selecting the applicable time blocks on the Inspection Scheduling screen. These time blocks appear in gray.

If Outlook Scheduling is enabled, the time blocks corresponding to any appointments booked through Outlook are automatically selected. These time blocks appear in gray with the Outlook logo. See *Scheduling the Inspection Time on page 81*.

To block time for an inspector:

1. Launch *Govern* and open the *Inspections* function.
2. Select the day on the calendar, during which the inspector is unavailable.
3. Click **Block Time** on the Inspections function.



**Inspection Scheduling**

Wednesday, April 01, 2009

Inspector: Dr Segun Olaniyan

Inspector's Territory: Town of Mount Royal

April 2009

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

9:00 a 10:00 a

9:05 a 10:05 a

9:10 a 10:10 a

9:15 a 10:15 a

9:20 a 10:20 a

9:25 a 10:25 a

9:30 a

9:35 a

9:40 a

9:45 a

9:50 a

9:55 a

OK Location Exit

Inspection Type(s) Final Inspection



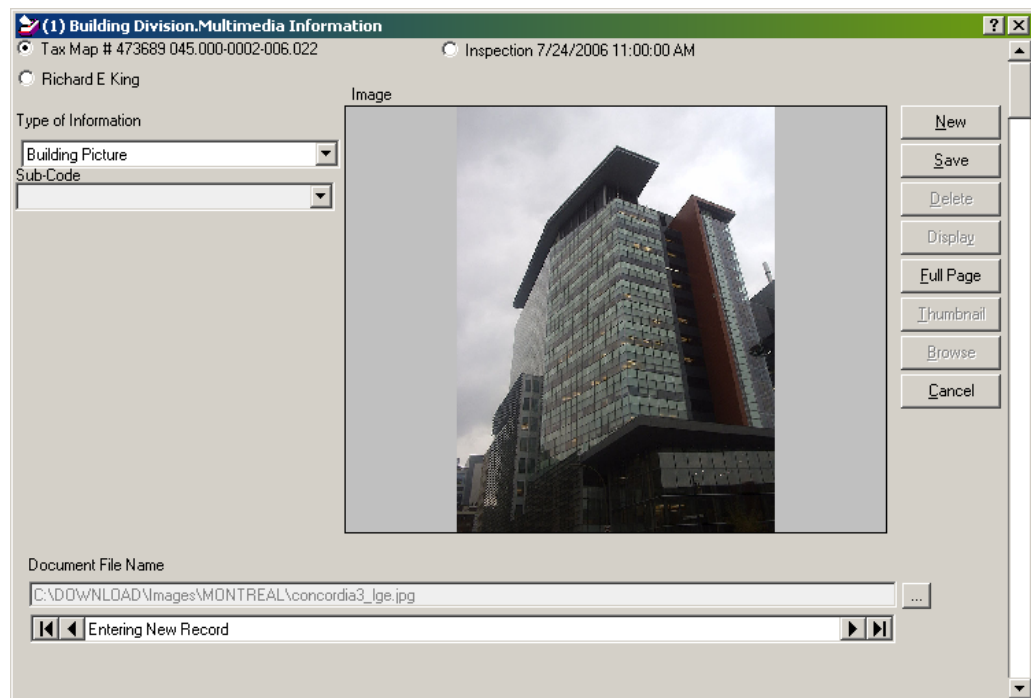
4. Select the time blocks for the period the inspector is unavailable.
5. Click **Save**. The *Comments* screen is displayed.
6. Enter the reason you are blocking the time.
7. Click **OK**.
8. Click **Comments** to view the previously-entered comments.
9. Click **Schedule** to view the schedule for the active day.

## Linking Multimedia Documents

You can link any type of multimedia document to the current inspection; for example, you can link an image of the property or scanned building plans. You can also store a link to any type of *OLE* enabled document, such as a Microsoft® Word or Excel file. An unlimited number of text lines can be stored with the file.

To link a multimedia document to the current inspection:

1. Click **Multimedia**.



2. Select the **Inspection** option.
3. Select the **Type of Information** from the drop-down list.

### Linking an Image

To insert an **image**.

**Note:** If the **Insert Picture** item does not appear in the menu, picture area of the screen, to enable this option.

1. Click inside the Image box.
2. On the Govern menu, select Edit > Insert Picture.
3. Once the image is located, click on the image or the file name.
4. Click OK.
5. Click Save to continue.

**Note:** Only the name of the image will be stored in the database.

### Linking Multimedia Text

To link multimedia text:

1. Click in the Notes Box.
2. Enter your text.
3. Click Save.

### Linking an OLE (from an existing document)

To link an Object Linking and Embedding (OLE)-enabled file:

1. Click in the **OLE Automation (Object Linking)** box.
2. On the Govern menu, select *Edit* > **Insert Object Link (OLE)**.
3. Select **Create from File**.
4. Click **Browse** and navigate to the file.
5. Select the file name and click **Open** or double-click on the file.
6. Click **Save**.

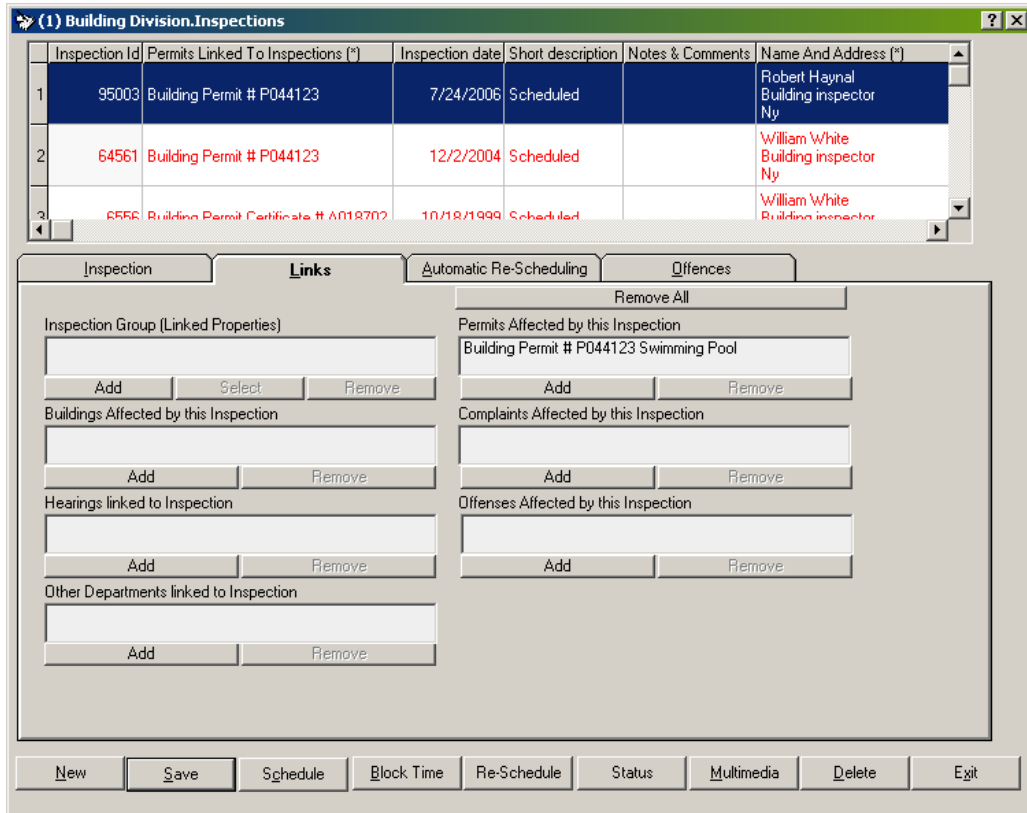
**Note:** To access the document, double-click in the OLE Box. This will open the software that created the document.

Refer to the *Permits* guide for further details on the Multimedia function.

## Linking Other Records

Use the **Links** tab to associate the following information with the inspection:

- Other properties
- Permits
- Buildings
- Complaints
- Hearings
- Offenses
- Other Departments



The screenshot shows the 'Building Division.Inspections' application window. At the top, there is a table with the following data:

Inspection Id	Permits Linked To Inspections (*)	Inspection date	Short description	Notes & Comments	Name And Address (*)
1	95003 Building Permit # P044123	7/24/2006	Scheduled		Robert Haynal Building inspector Ny
2	64561 Building Permit # P044123	12/2/2004	Scheduled		William White Building inspector Ny
3	6556 Building Permit Certificate # A019702	10/19/1999	Scheduled		William White Building inspector

Below the table, there are four tabs: 'Inspection', 'Links', 'Automatic Re-Scheduling', and 'Offences'. The 'Links' tab is currently selected. It contains several sections for linking records to the inspection:

- Inspection Group (Linked Properties):** Includes an 'Add' button and a 'Remove' button.
- Buildings Affected by this Inspection:** Includes an 'Add' button and a 'Remove' button.
- Hearings linked to Inspection:** Includes an 'Add' button and a 'Remove' button.
- Other Departments linked to Inspection:** Includes an 'Add' button and a 'Remove' button.
- Permits Affected by this Inspection:** Includes an 'Add' button and a 'Remove' button.
- Complaints Affected by this Inspection:** Includes an 'Add' button and a 'Remove' button.
- Offenses Affected by this Inspection:** Includes an 'Add' button and a 'Remove' button.

At the bottom of the window, there is a row of buttons: 'New', 'Save', 'Schedule', 'Block Time', 'Re-Schedule', 'Status', 'Multimedia', 'Delete', and 'Exit'.

## Linking / Removing All Items

To link all properties, permits, buildings, complaints, hearings and offenses, from the Global Variable; i.e., those that appear on the Govern CoolBar, click **Add All (Automatic Linking)**.

SNYDER, WILLARD P & ETUX Since Jul 1958	SNYDER, WILLARD P & ETUX % PIAZZA, ELLEN DI 236 QUINCE STREET PHILADELPHIA, PA 19107	Hinkle Road	0 Hinkle Road	Building Permit
Building Permit Application # 000001007	Inspection 07/07/2005 11:00:00 AM			Tax Map # 00-09-1709.000

**Tip:** You can manually remove any links that are not required.

To delete all links associated with the current record, click **Remove All**.

You can add and remove multiple items to and from any list box, using the **Ctrl** and **Shift** keys.

To add or remove multiple items that are listed consecutively:

1. Highlight the first item in the list.
2. Hold down the **Shift** key.
3. Select the last item in the list.
4. Click **OK** or **Remove**, as applicable.

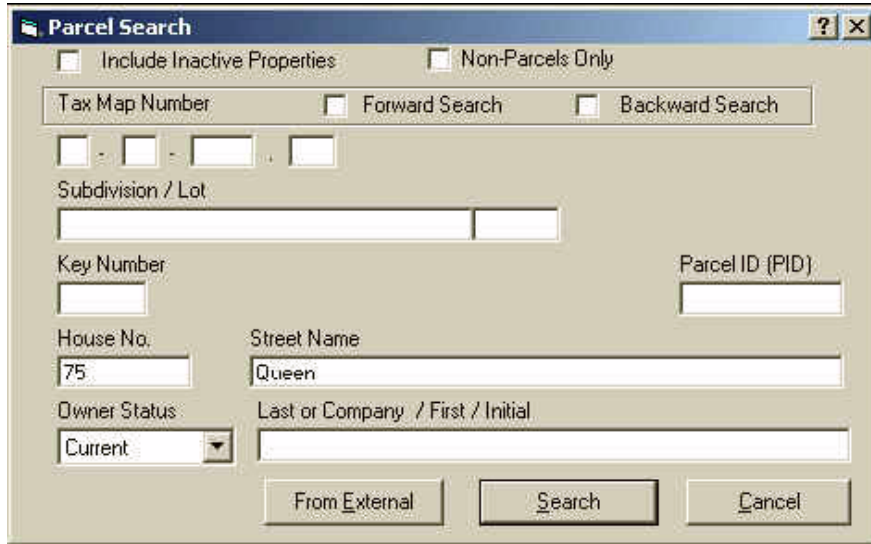
To add or remove multiple items that are not listed consecutively:

1. Highlight the first item in the list.
2. Hold down the **Ctrl** key.
3. Select the next item or items.
4. Click **OK** or **Remove**, as applicable.

## Properties

To link other properties to the inspection:

1. Click **Add** to open the *Parcel Search* screen.



The **Parcel Search** dialog box contains the following fields and controls:

- Checkboxes: ☐ Include Inactive Properties, ☐ Non-Parcels Only
- Search Type: ☐ Forward Search, ☐ Backward Search
- Tax Map Number: [ ] - [ ] - [ ] - [ ]
- Subdivision / Lot: [ ] [ ]
- Key Number: [ ]
- Parcel ID (PID): [ ]
- House No.: [ 75 ]
- Street Name: [ Queen ]
- Owner Status: [ Current ] (dropdown menu)
- Last or Company / First / Initial: [ ]
- Buttons: From External, Search, Cancel

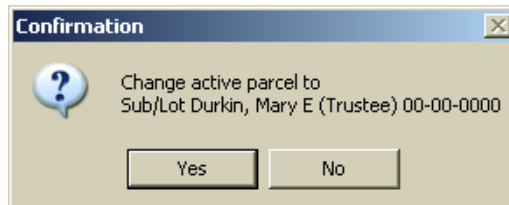
2. Enter your search criteria and click **Search**.
3. Select the applicable properties from the Browsing screen. Alternately, you can click **From External** to link the properties from an external record set, previously loaded to PC\_EXTERNAL. *Refer to the Property Control guide for more information on the Parcel Search.*

To remove a property link, highlight the property in the text box and click **Remove**.

### Selecting a Property as Current

To make one of the other properties in the list the current or active property:

1. Highlight it in the text box and click **Select**. A confirmation message appears:



The **Confirmation** dialog box displays the following:

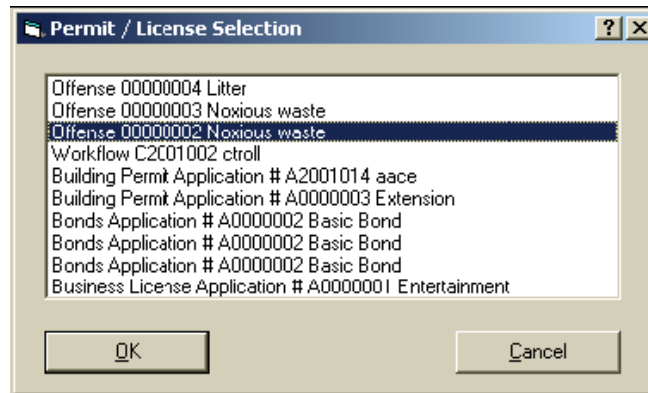
- Icon: Question mark in a blue circle
- Text: Change active parcel to Sub/Lot Durkin, Mary E (Trustee) 00-00-0000
- Buttons: Yes, No

2. Click **Yes**.

## Permits

To link permits, licenses, approvals, bonds, decisions, prosecutions and appeals, to the current record:

1. Click **Add** on the **Permits** text box to open the *Permit / License Selection* screen that displays all permits for the current property.



2. Highlight all the applicable items and click **OK**.

**Note:** The *Permit / License Selection* screen can be set to display the permits, licenses, approvals, bonds, decisions, prosecutions and appeals for all departments. *Refer to the Permits guide for the administrative setup.*

To remove a link to a permit, highlight it in the list and click **Remove**.

## Buildings

To link other buildings to the current record:

1. Click Add.

	Building Id	Seq	Building Location	Unit No.
1	1	0	Hinkle Road	
2	71038	0	Hinkle Road	

2. Highlight the building or buildings on the *Browsing* screen and click **Select**

**Note:** Only the active buildings are displayed.

To delete a link to a building, highlight the building in the text box and click **Remove**.

## Complaints, Requests for Services, Grievances and Workflow

To link a *Complaint*, *Request for Services*, *Grievance* or *Workflow* to the current record:

1. Click **Add**.
2. Highlight the applicable complaints, requests for services, grievances and workflow and click **OK**.

To delete a complaint, request for services, grievance or workflow, highlight it and click **Remove**.

## Public Hearings

To link a *Public Hearing* to the current record:

1. Click **Add**.
2. Highlight the Hearing you want to link and click **OK**.

To remove a hearing from the inspection, highlight it in the *Hearings* list box and click **Remove**.

## Offenses

To link an *Offense* to the current record:

1. Click **Add**.
2. Select the offenses you want to link and click **OK**.

To remove an *Offense* from the current record, highlight the offense you want to delete and click **Remove**.

## Departments

To link another *Department* to the current record:

1. Click **Add**.
2. Select the departments you want to link and click **OK**.

To remove a *Department* from the current record, highlight it and click **Remove**.

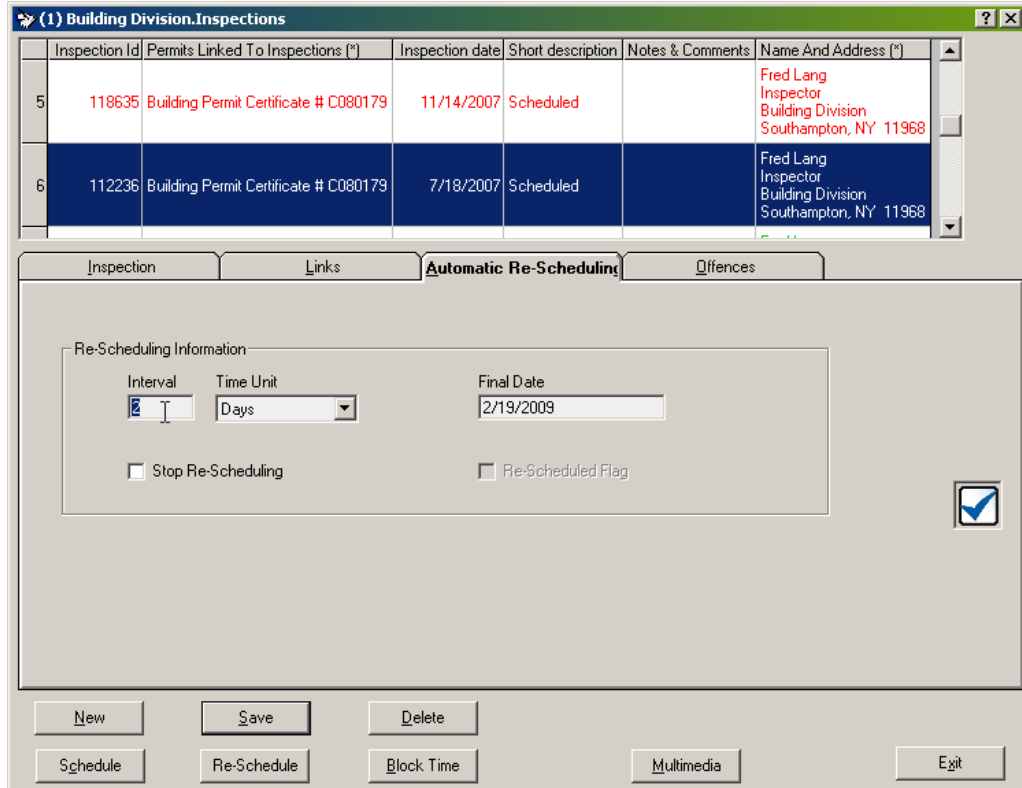
An administrator can link other departments, when setting up an inspection that is automatically generated from a *System Activity*. See *Linking the Inspection to Other Departments on page 61*. The departments linked in the administrative setup are displayed in this list box.

## Setting Up Automatic Rescheduling

Use the *Automatic Rescheduling* tab to set up a schedule for inspections that need to be performed at set intervals up to a specific date; for example, for a building inspection that needs to be performed every two weeks until the building is complete or the permit expires. After defining the parameters, you need to run the *Automatic Inspection Rescheduling* process from Govern Batch Processing.

**Tip:** To reschedule an inspection that was not performed when it was originally scheduled use the **Reschedule** button. See *Rescheduling an Inspection on page 119*.





Inspection Id	Permits Linked To Inspections (*)	Inspection date	Short description	Notes & Comments	Name And Address (*)
5	118635 Building Permit Certificate # C080179	11/14/2007	Scheduled		Fred Lang Inspector Building Division Southampton, NY 11968
6	112236 Building Permit Certificate # C080179	7/18/2007	Scheduled		Fred Lang Inspector Building Division Southampton, NY 11968

Re-Scheduling Information

Interval:  Time Unit:  Final Date:

☐ Stop Re-Scheduling ☐ Re-Scheduled Flag ☒

Buttons: New, Save, Delete, Schedule, Re-Schedule, Block Time, Multimedia, Exit

To define the rescheduling parameters:

1. Select Days, Months or Weeks, from the Time Unit drop-down list to define, along with the Interval, how often to reschedule the inspection (Table: VT\_SY\_ PERIOD).
2. Select a value to define, along with the Time Unit, how often to reschedule the inspections.

**For Example:**

If you select **14** as the **Interval** and **Days** as the **Time Unit**, the inspection is automatically rescheduled every 14 days, up to either the **Final Date**, entered on this tab, or the **Rescheduling Limit Date** entered on the *Automatic Inspection Rescheduling* form in Govern Batch Processing.

3. Enter the last day the inspection can be scheduled.
4. Click **Save**. A new record is created for each scheduled inspection, once the batch process is run.

## Inspections



**Stop Rescheduling:** Select this option to prevent the inspection from being rescheduled.

**Rescheduled Flag:** This field is selected when an inspection has been rescheduled through Govern Batch Processing. **It cannot be modified.**

## Reassign Inspections function

The *Reassign Inspections* function allows you to reassign individual inspections, or transfer an inspectors entire workload to other inspectors within a department or external to the department.

**Note:** The *Reassign Inspections* function is a function that does not require the opening of a specific record in order to access it.

Select	Inspector Name	%	New Date for Inspections
<input checked="" type="checkbox"/>	Lester Bakiewicz	0	1/4/2008
<input checked="" type="checkbox"/>	Tom Baldassare	0	1/4/2008
<input type="checkbox"/>	Michael Benincasa	0	1/4/2008
<input type="checkbox"/>	Jack D Capone	0	1/4/2008

## Reassign Inspections Command Buttons

**Refresh:** Select Refresh to apply any selections or changes and update your current view with any new information.

**Reassign:** After selecting an inspector to reassign to, click **Reassign** to transfer to the selected inspector. If no names have been selected for reassignment, an error dialog box will appear; click **OK** to continue.

**Save:** To save any modifications, click **Save**.

**Print:** Click Print to print out the list of inspections displayed.

**Exit:** Click **Exit** to leave this function and return to your previous screen.

### Reassign Inspections Parameters

**Reassign Inspections:** Select this option to perform a reassignment of inspections.

**Re-sequence Inspections:** This option, when selected, will allow you to change the order of occurrence or sequence of your inspections

**Refresh:** Select Refresh to apply any selections or changes and update your current view with any new information.

**Show Inspectors for All Departments:** To display all inspectors in all departments, select this check box.

**Inspector:** Select the name of an inspector from the drop down menu list.

**Date:** This field by default will display the current system date.

### Inspections: group

When an inspector is selected from the **Inspector** list, their scheduled inspections appear in the **Inspections:** area. The following column headings are displayed:

	Inspector Name	IN_ID	Inspection Date	Seq.No	Period	Insp.Time	Duration	Property
1	Lester Bakiewicz	101987	9/18/2007	1	Anytime			
2	Lester Bakiewicz	101986	9/18/2007	2	Anytime			

- **Inspector Name** - List of inspectors

- **IN\_ID** - Inspectors ID in the database
- **Inspection Date** - Scheduled date of inspection
- **Seq. No.** - Sequence or order that inspection will occur
- **Period** - Period of occurrence of inspection AM, PM, Anytime, Time
- **Insp. Time** - Time that the inspection will occur
- **Duration** - Length of the inspection
- **Property Location** - Location of the property to be inspected
- **Tax Map Number** - Tax Map number of the property
- **Inspection Types** - Classification of the inspection
- **Linked Permits** - Permits that are linked to the inspection

### Available Inspectors group

This area to the immediate right of the **Inspector** drop down menu list will display inspectors that are available to the current department. The following column headings are displayed:

	Select	Inspector Name	%	New Date for Inspections
19	<input type="checkbox"/>	Lester Bakiewicz	0	9/18/2007
20	<input type="checkbox"/>	Michael Benincasa	0	9/18/2007
21	<input checked="" type="checkbox"/>	Maureen Berglin	0	9/18/2007
22	<input type="checkbox"/>	Karen Bontempo	0	9/18/2007

- **Select** - Click in this check box to select the inspector
- **Inspector Name** - The name of the inspector
- **%** - The percentage of the workload that is to be transferred to the inspector
- **New Date for Inspections** - Displays the new scheduled date for the inspection

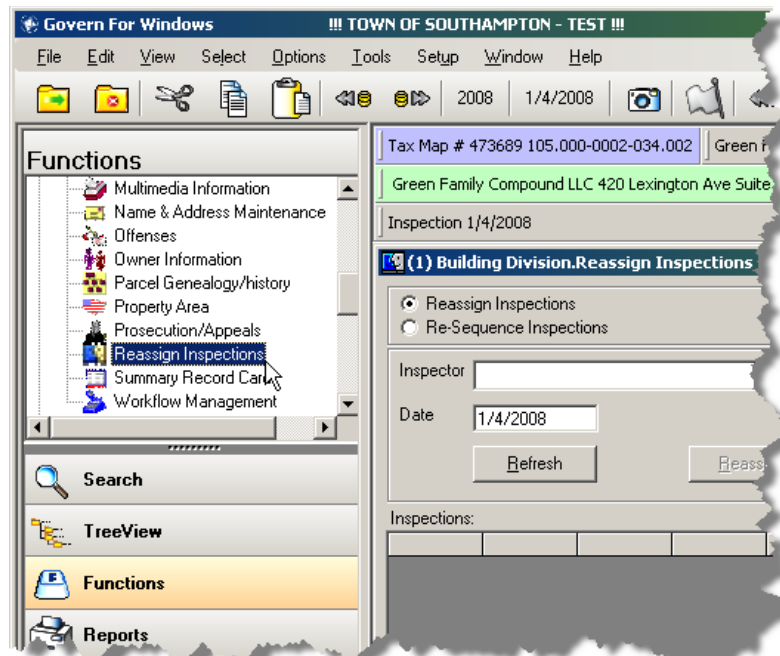
## Using the Re-assign Inspections function

### Scenario 1: Ad Hoc Re-assignment

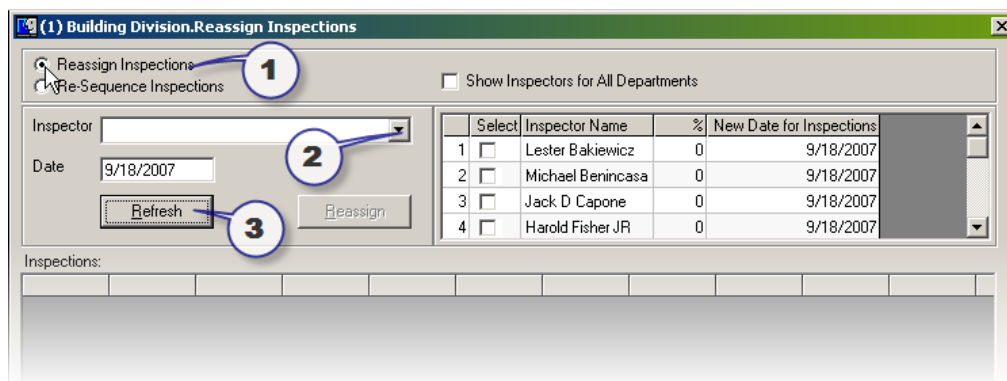
On any given day, it may be necessary to manually reassign one or more inspections to another inspector on an “ad hoc”, or as needed basis.

To reassign an inspection on an ad hoc basis:

1. Click **Functions** in the **Side Navigation Bar**.



2. In the *Treeview* area on the upper left hand side (LHS), select **Reassign Inspections**.
3. At the *Reassign Inspections* function form, click the **Reassign Inspections** radio button.
4. Select an **Inspector** from the drop down menu list.



5. Click **Refresh** to display the updated information.

6. In the **Inspections:** group under the **Inspector Name** column, click on the name of the inspector.
7. In the drop down menu list that appears, select the name of the inspector that the inspection will be assigned to.

**Note:** When an inspection is reassigned in this manner, there is validation of the inspection time, the inspector must manually select the time and verify that the time is valid.

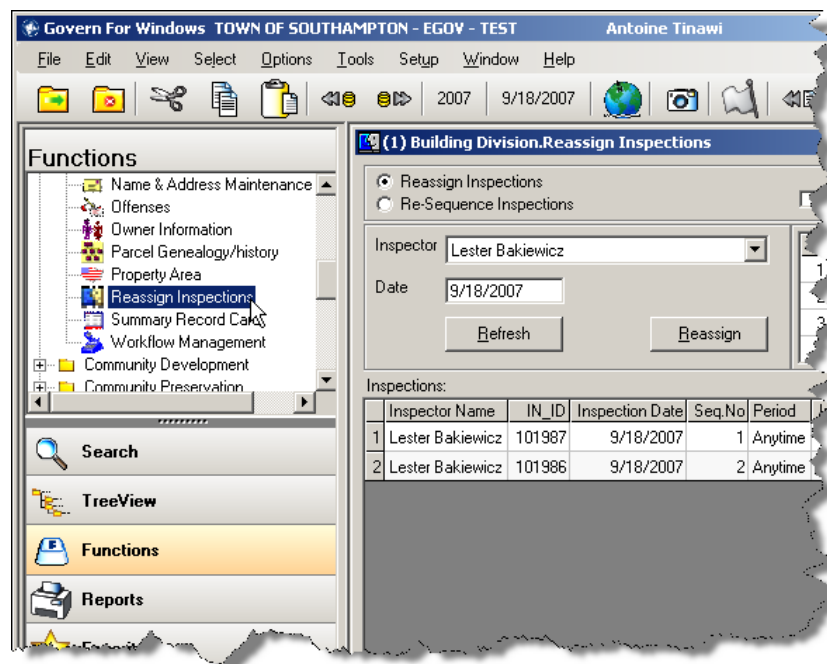
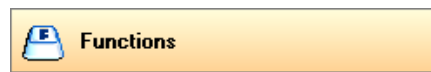
8. Click **Save** to save your changes.

### Scenario 2: Re-assignment of Inspections within a Department

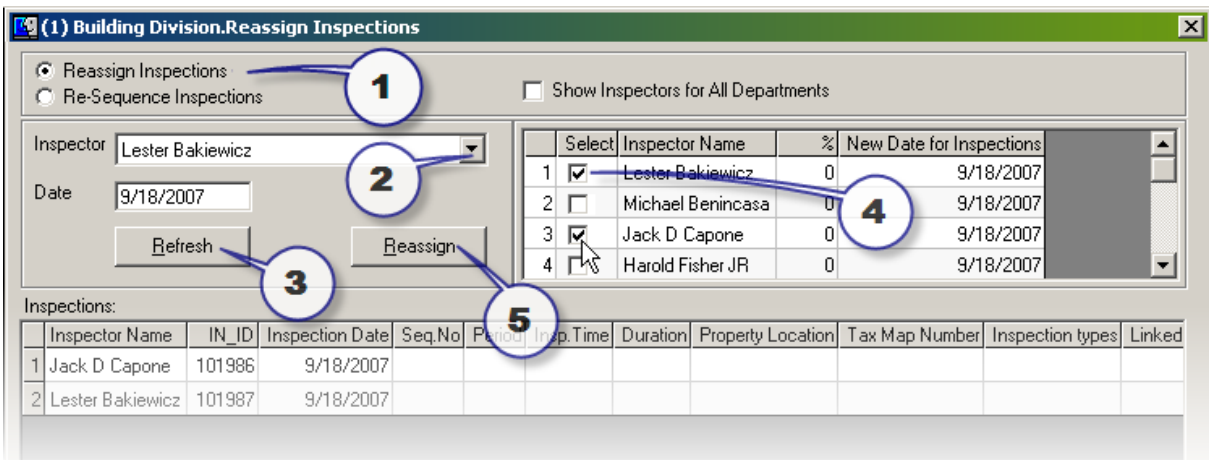
Should an inspector not be able to perform their duties on a given day, i.e. calls in absent, it may be necessary to redistribute their workload to one or more inspectors in their department.

To redistribute an inspectors workload to other inspectors in the same department:

1. Click **Functions** in the **Side Navigation Bar**.



2. In the *Treeview* area on the upper left hand side (LHS), select **Reassign Inspections**.
3. At the *Reassign Inspections* function form, click the **Reassign Inspections** radio button.
4. Select an **Inspector** from the drop down menu list.



**(1) Building Division.Reassign Inspections**

☒ Reassign Inspections  
☐ Re-Sequence Inspections

☐ Show Inspectors for All Departments

Inspector: Lester Bakiewicz

Date: 9/18/2007

Refresh Reassign

Select	Inspector Name	%	New Date for Inspections
<input checked="" type="checkbox"/>	Lester Bakiewicz	0	9/18/2007
<input type="checkbox"/>	Michael Benincasa	0	9/18/2007
<input checked="" type="checkbox"/>	Jack D Capone	0	9/18/2007
<input type="checkbox"/>	Harold Fisher JR	0	9/18/2007

Inspections:

	Inspector Name	IN_ID	Inspection Date	Seq.No	Period	Insp.Time	Duration	Property Location	Tax Map Number	Inspection types	Linked
1	Jack D Capone	101986	9/18/2007								
2	Lester Bakiewicz	101987	9/18/2007								

5. Click **Refresh** to display the scheduled inspections.
6. In the **List of available Inspectors** to the right of the **Inspector** drop down menu list, click the check box in the *Select* column beside an inspectors name; this inspector will be assigned the inspections.
7. Click in the “%” field and enter the percentage of the inspections that are to be assigned to this inspector.
8. After you have selected all the inspectors that are to have inspections transferred to them, click **Save** to save your changes.

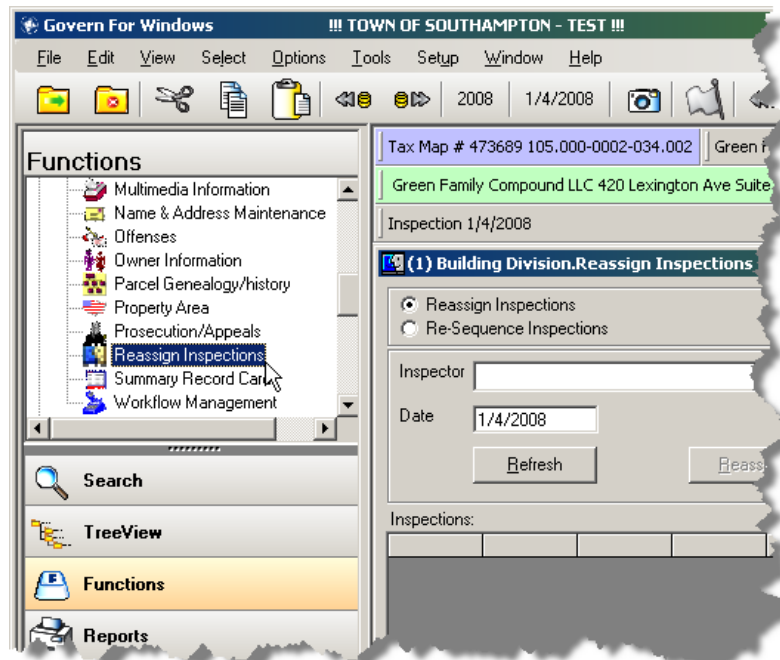
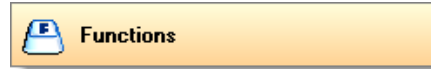
### Scenario 3: Re-assignment of Inspections to any Department

There are municipalities where citizens have the to receive an inspection within a given time frame. If the city is unable to accommodate them, it is within their rights to solicit an independent inspector and send all associated expenses to the city.

When a department does not have the resources to accommodate the citizens request for an inspection, Govern will allow you to assign an inspection to resources in another department.

To assign an inspection to another department:

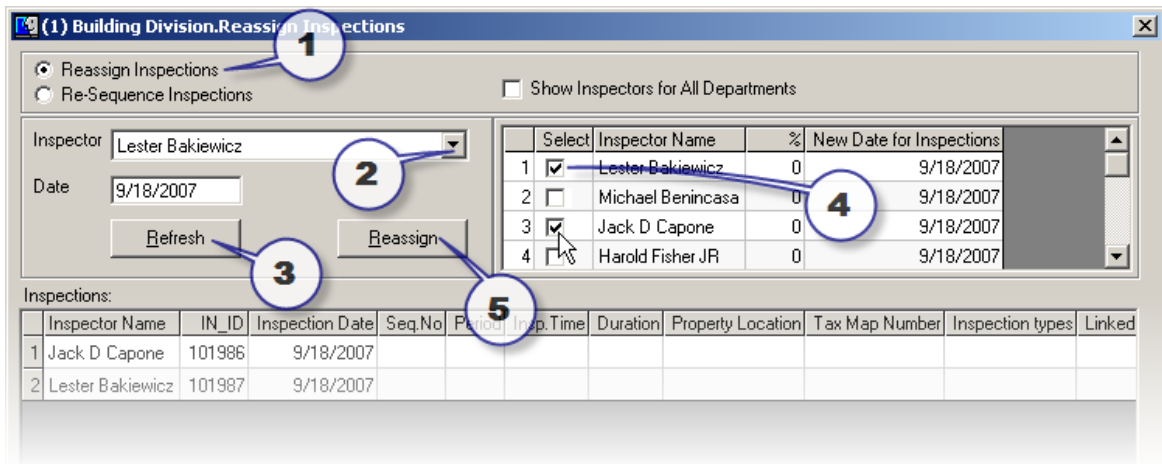
1. Click **Functions** in the **Side Navigation Bar**.



2. In the *Treeview* area on the upper left hand side (LHS), select **Reassign Inspections**.
3. At the *Reassign Inspections* function form, click the **Reassign Inspections** radio button.
4. Select **Show Inspectors for All Departments** to view all inspectors in all departments.



5. Select an **Inspector** from the drop down menu list.



The screenshot shows the 'Reassign Inspections' window. Callout 1 points to the 'Reassign Inspections' radio button. Callout 2 points to the 'Inspector' dropdown menu which currently shows 'Lester Bakiewicz'. Callout 3 points to the 'Refresh' button. Callout 4 points to the 'Select' checkbox in the 'List of available Inspectors' table. Callout 5 points to the 'Inspections' table below.

Select	Inspector Name	%	New Date for Inspections
<input checked="" type="checkbox"/>	Lester Bakiewicz	0	9/18/2007
<input type="checkbox"/>	Michael Benincasa	0	9/18/2007
<input checked="" type="checkbox"/>	Jack D Capone	0	9/18/2007
<input type="checkbox"/>	Harold Fisher JR	0	9/18/2007

Inspector Name	IN_ID	Inspection Date	Seq.No	Period	Insp. Time	Duration	Property Location	Tax Map Number	Inspection types	Linked
1 Jack D Capone	101986	9/18/2007								
2 Lester Bakiewicz	101987	9/18/2007								

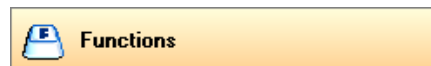
6. Click **Refresh** to display the scheduled inspections.
7. In the **List of available Inspectors** to the right of the **Inspector** drop down menu list, click the check box in the *Select* column beside an inspectors name; this inspector will be assigned the inspections.
8. Click in the “%” field and enter the percentage of the inspections that are to be assigned to this inspector.
9. After you have selected all the inspectors that are to have inspections transferred to them, click **Save** to save your changes.

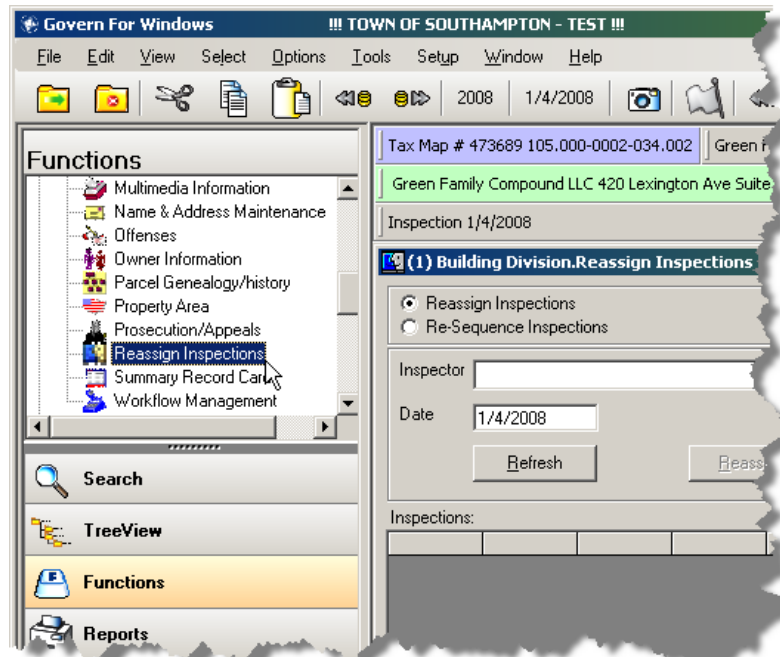
### Re-sequencing Inspections

Changing the sequence number of an inspection will effectively change the order that the inspection will be conducted. Should an inspector be aware that a series of inspections are in close proximity to each other, they can be set up to occur sequentially as a means of reducing travel time.

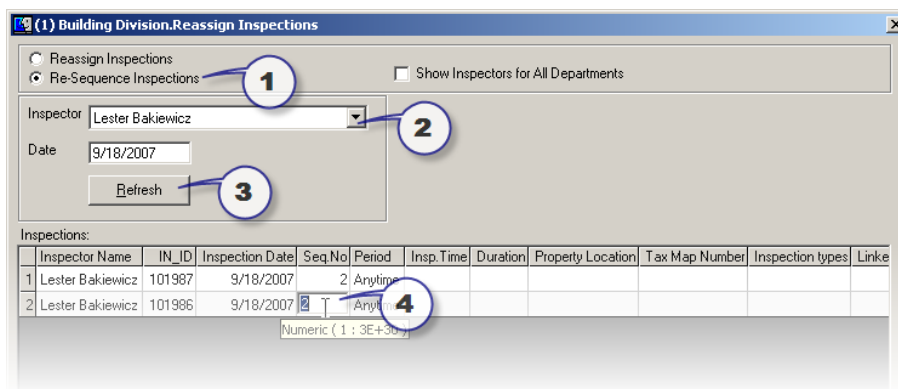
To re-sequence inspections:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Reassign Inspections**.
3. At the *Reassign Inspections* function form, click the **Re-Sequence Inspections** radio button.
4. Select an **Inspector** from the drop down menu list.



5. Click **Refresh** to display the associated inspections.

6. In the **Inspections:** group under the **Seq. No.** column, click on the number and enter a new sequence.

**Note:** When a series of sequence numbers are entered, the system will resort all inspections starting with the number 1.

## Work Codes Linked to Inspections

During the issuance of a permit, a series of steps involving inspections may be required for qualification.

For example, we could say that before we are able to issue a permit for the installation of a 50 kilowatt electric generator, the following series of inspections must occur:

- Structural integrity of Housing (where the generator is to be housed)
- Location of Structure
- Fuel tanks (diesel or gas tanks)
- Electrical wiring (connections to the house and municipality)

Each one of the above is an inspection in itself and in some instances must be completed in a specific order. In Govern, it is possible to link a *Building Permit* to install a 50 kilowatt generator to an inspection type. To do this, a work code would need to be created with a series of required inspections, some of which may need to be performed in a set sequence.

The *Work Codes Linked to Inspections* feature allows us to perform the requirements mentioned in the above scenario:

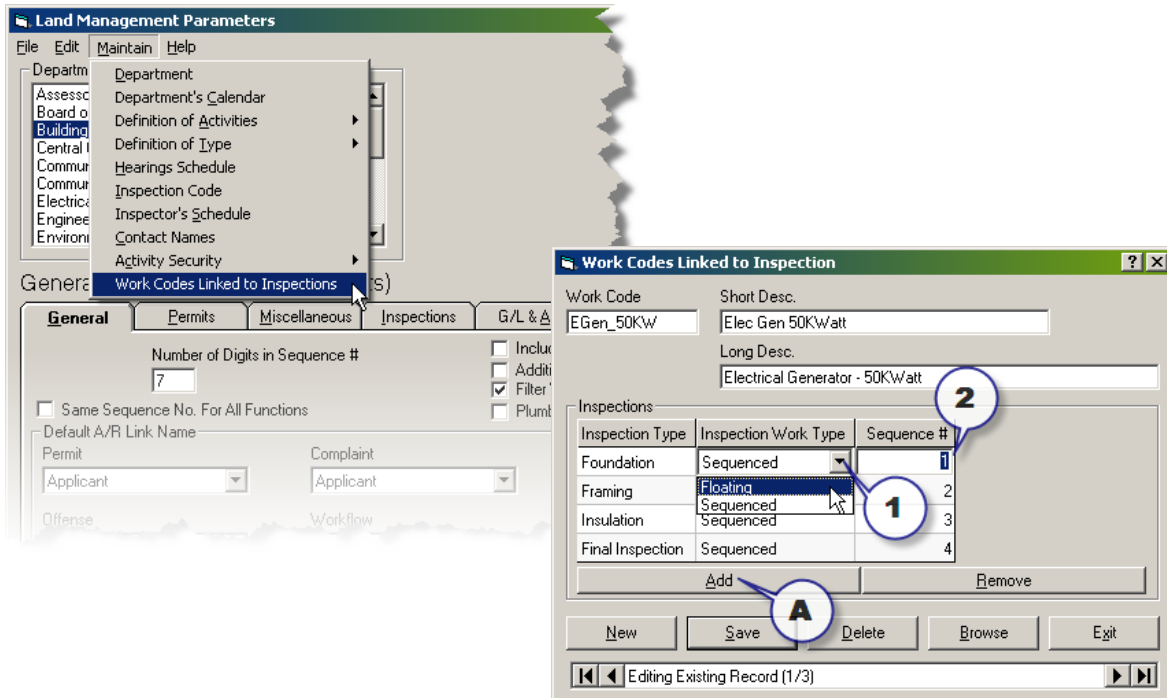
- Create a *Building Permit* of type *Electric Generator*.
- Create a work code of type 50 kilowatt and add the necessary inspections, and if required, the sequence that the inspections must occur.

To create a Permit, follow the steps for *Creating a Permit in the Permits & Licenses guide*.

To create a work code linked to an inspection:

1. Select *Parameters > Land Management > Parameters...*
2. Highlight a department from the *Departments* list.

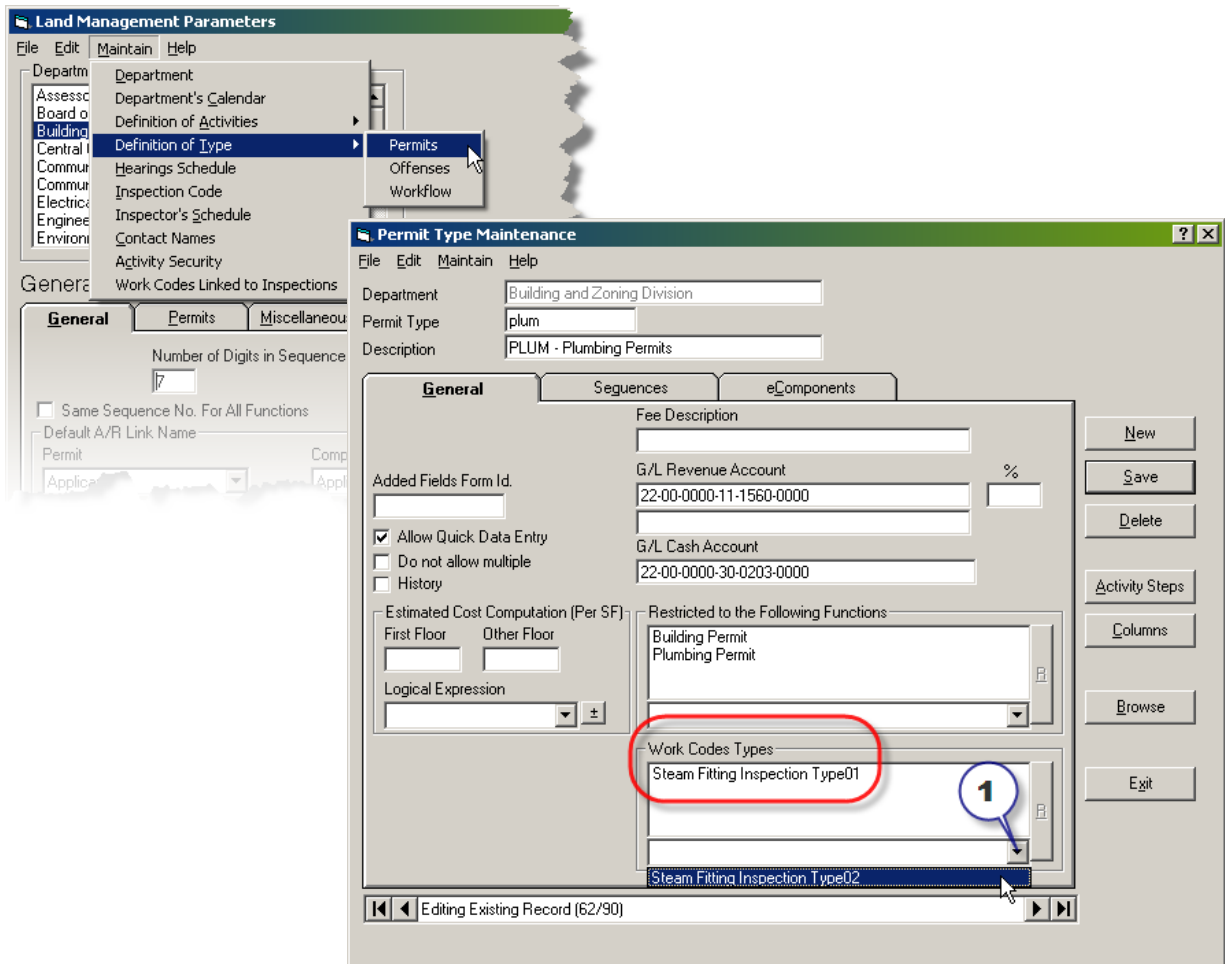
### 3. Select *Maintain* > **Work Codes Linked to Inspections**



4. Click **New** to create a new work code in the VT\_USR\_WORKCODE table; complete the required parameters.
5. Click **Add** to add required steps for this permit or inspection.

The **Inspection Work Type** column allows you to specify whether the inspection will be one of two (2) options:

- **Floating** - may be performed in any order.
  - **Sequenced** - must follow the order under *Sequence #* column.
6. The sequence of occurrence can be changed by modifying the number under the **Sequence #** column; click inside the grid and highlight the number to modify.



**Land Management Parameters**

File Edit Maintain Help

- Department
- Assess
- Board of
- Building
- Central
- Commun
- Commun
- Electri
- Enginee
- Environ

Department's Calendar  
Definition of Activities  
Definition of Type  
Hearings Schedule  
Inspection Code  
Inspector's Schedule  
Contact Names  
Activity Security  
Work Codes Linked to Inspections

Permits  
Offenses  
Workflow

**Permit Type Maintenance**

File Edit Maintain Help

Department: Building and Zoning Division  
Permit Type: plum  
Description: PLUM - Plumbing Permits

**General** Sequences eComponents

Fee Description  
G/L Revenue Account: 22-00-0000-11-1560-0000  
G/L Cash Account: 22-00-0000-30-0203-0000

Added Fields Form Id.  
☐ Allow Quick Data Entry  
☐ Do not allow multiple  
☐ History

Estimated Cost Computation (Per SF)  
First Floor:   
Other Floor:   
Logical Expression:

Restricted to the Following Functions  
Building Permit  
Plumbing Permit

Work Codes Types  
Steam Fitting Inspection Type01  
Steam Fitting Inspection Type02

New  
Save  
Delete  
Activity Steps  
Columns  
Browse  
Exit

Editing Existing Record (62/90)

7. In the *Land Management Parameters* form, select the department that the work code was created in.
8. Select *Maintain > Definition of Type > Permits*.
9. In the *Permit Type Maintenance* form select the permit that you had created for the work codes.
10. In the *Work Code Types* group, select the work code from the drop-down menu. (USR\_LK\_PM\_WORKCODE Table)
11. Select the functions that the permit will be restricted to under the *Restricted to the Following Functions* group.
12. Click **Save**.

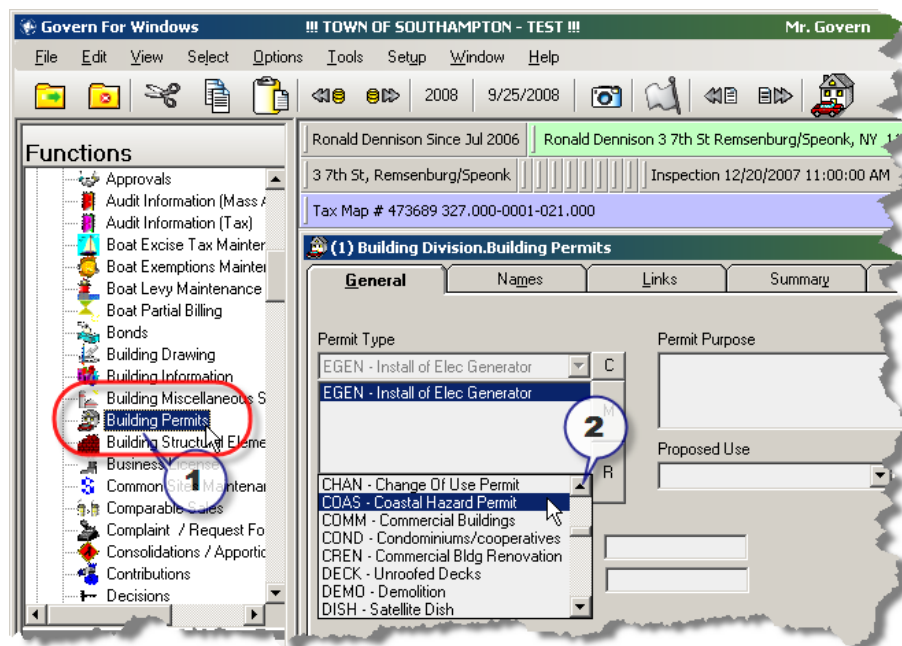
## Inspections



Now that the permit type has been created and the work codes have been linked to it, you can now proceed to *Govern for Windows* to generate the permit.

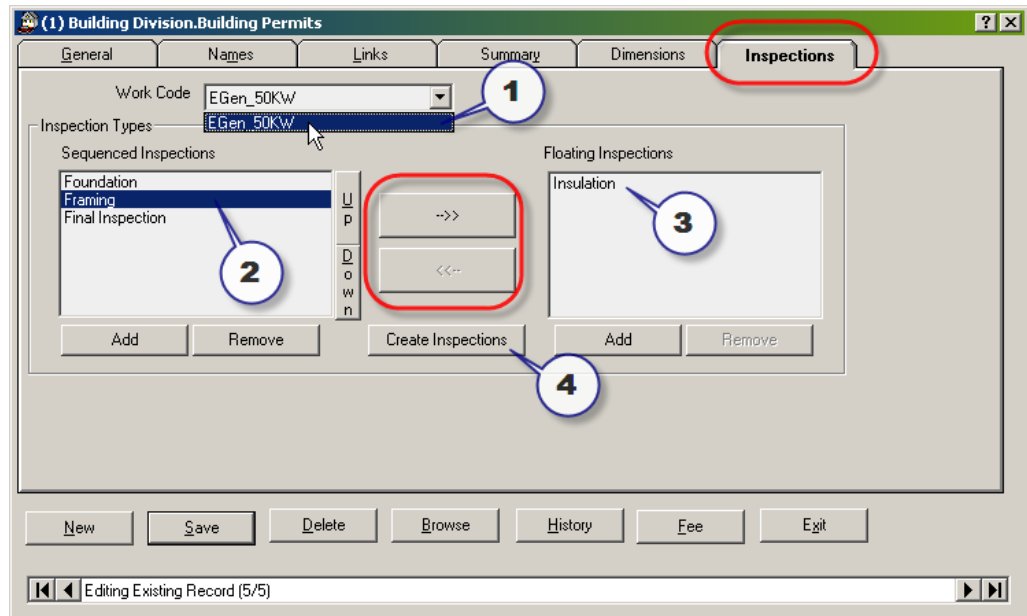
To create a permit with linked work codes:

1. In *Govern for Windows*, open a record and click **Functions** in the Side Navigation Bar (SNB). In the *Treeview* area on the upper left hand side (LHS), select, for our example, the *Building Permit* function.



2. In the *Building Permits* form click **New** to create a new permit type.
3. Click **Save** to save the permit.

- Click the **Inspections** tab to view the *Work Code* parameter and select a work code from the drop-down menu.



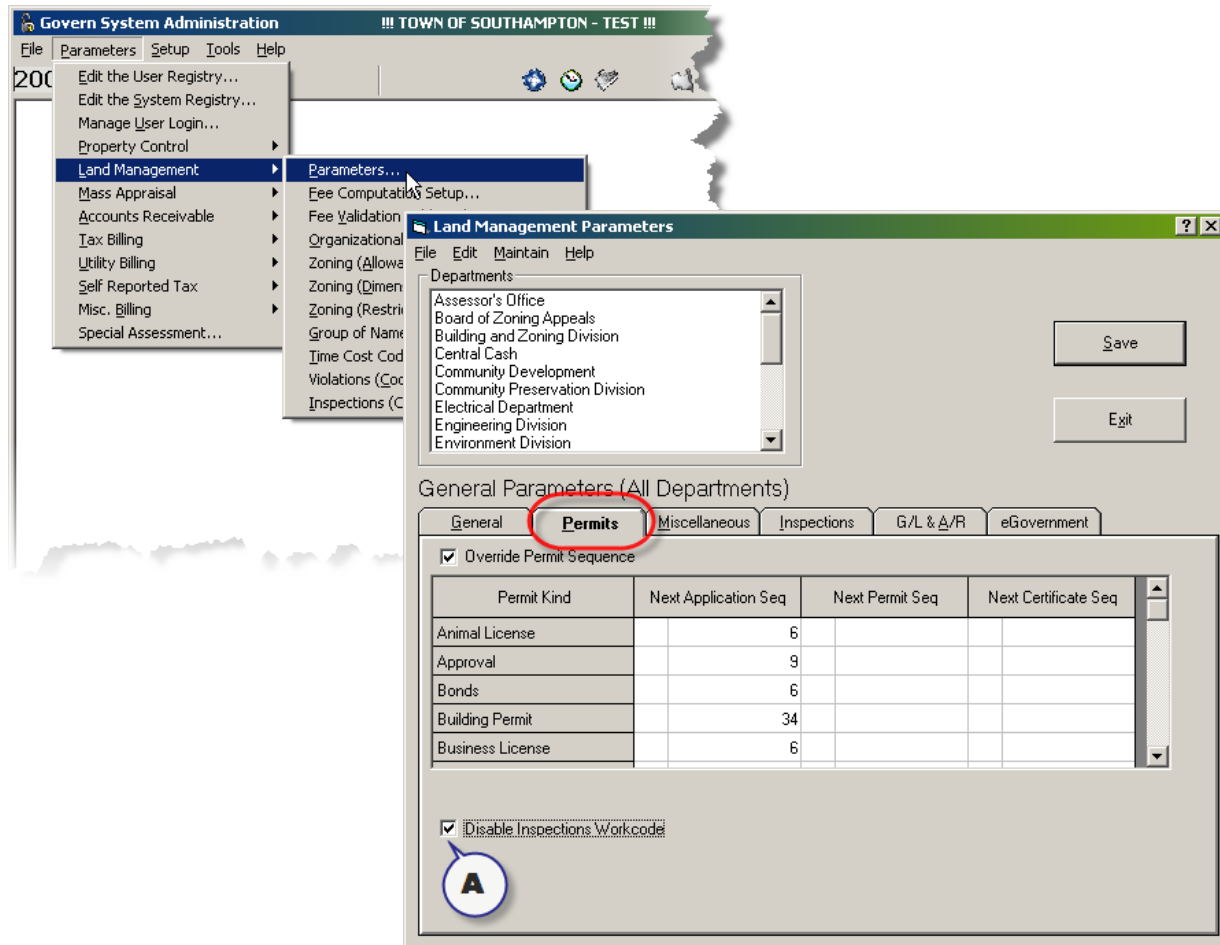
You can add or remove inspection types to or from the list with the **Add** or **Remove** button. You can also change the inspection type from **Sequenced** to **Floating**. With sequenced inspections you can change the order of the inspection type with the **Up** or **Down** buttons.

## Disable Inspections Work Codes

Linking Work Codes to inspections is an option that was released in *Govern 10.5*; the appearance of the inspections tab may be confusing to older users. There is an option available to enable and disable the tab, which by default is visible.

To disable the *Inspections Work Code* and the *Inspections* tab:

1. Select *Parameters* > *Land Management* > **Parameters....**



2. In the *Land Management Parameters* form, click the **Permits** tab; in the lower left hand side (LHS) select the option to **Disable Inspection Work Codes**.

The result of selecting this option is that in *Govern for Windows* the **Inspections** tab will not be displayed in any of the *Permits* functions.

**Note:** Should the *Inspections Work Codes* feature be used prior to deciding to disable the feature, your data will still be retained.



# Automatic Inspection Rescheduling



## Overview


Run the batch *Automatic Inspection Rescheduling* process to schedule inspections that need to be performed periodically, for example, a building inspection that needs to be performed every two weeks until the completion of the building or the expiration of the permit.

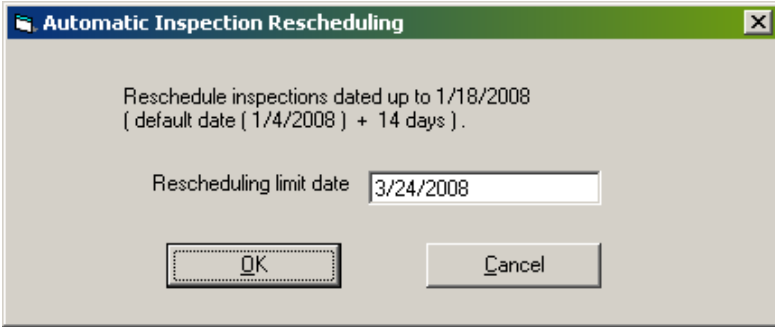
If Outlook Scheduling is enabled, appointments are created in the inspectors' Outlook Calendar for the inspections scheduled through the Automatic Inspection Rescheduling process. *For details on integrating Govern with Microsoft® Outlook®, refer to the Govern's Inspections guide.*

**Note:** Outlook Scheduling is not available in this version of the *Mobile Inspection* and *DeskTop Inspection* components.

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click the GovBatch icon  then select *Tools* > **Automatic Inspection Rescheduling**.



The *Automatic Inspection Rescheduling* form displays two dates. The first determines the inspections to include in the process; i.e., all inspections scheduled prior to the specified date. The second defines the last date to reschedule inspections through the batch process.

The date, for determining the inspections to include in the process, is calculated by adding the **Number of Days for Rescheduling Inspections**, as defined on the Land Management Parameters form in Govern Admin to the current or default day. See *Number of Days for Automatic Rescheduling on page 51 for details on the administrative parameter*.

**For Example:**

Current Date:	07/12/2006
Number of Days for Automatic Rescheduling:	14
Reschedule Inspections up to:	07/31/2006

All inspections scheduled prior to this date are included in the batch process, provided **Automatic Rescheduling** parameters have been defined. See *Setting Up Automatic Rescheduling on page 73 for details on the user application*.

In this example, this includes all inspections scheduled between 07/12/2006 and 07/31/2006.

To run the batch process:

1. Enter the **Rescheduling Limit Date**.
2. Click **OK**.

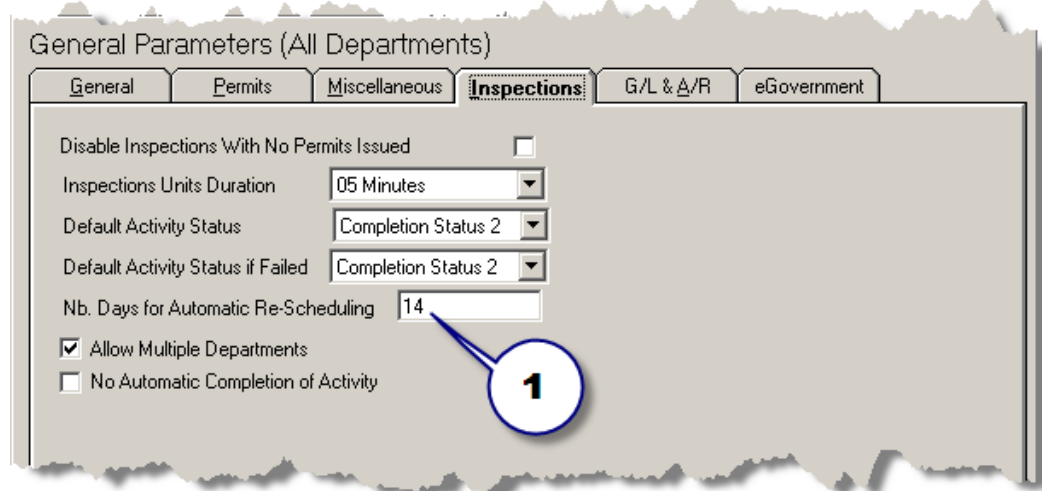
New inspections are scheduled for the interval set in Govern, up to the *Rescheduling Limit Date*. A new record is created for each inspection scheduled through the *Automatic Inspection Rescheduling* process. The **Rescheduled Flag** option is selected for each of these records.

In addition, if you have enabled *Outlook Scheduling*, appointments are added to the inspectors' Outlook Calendars for the inspections scheduled through the process.

For example, the *City of Montreal* needs to inspect the work being done on a series of new building projects, every two weeks, until the work is complete.

To set up automatic rescheduling for these projects:

1. Launch Govern Admin and open the *Land Management Parameters* form.



General Parameters (All Departments)

General Permits Miscellaneous **Inspections** G/L & A/R eGovernment

Disable Inspections With No Permits Issued ☐

Inspections Units Duration 05 Minutes

Default Activity Status Completion Status 2

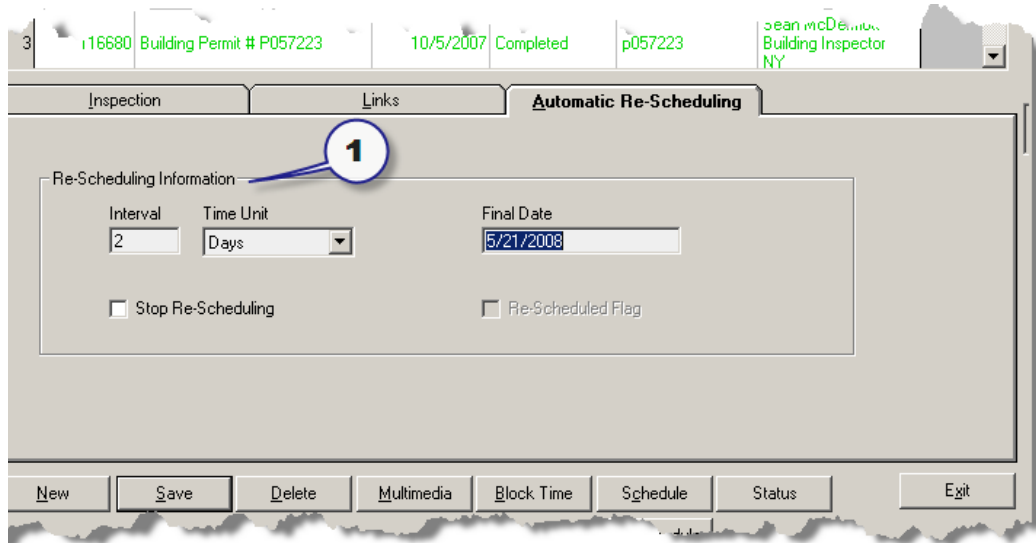
Default Activity Status if Failed Completion Status 2

Nb. Days for Automatic Re-Scheduling 14

☒ Allow Multiple Departments

☐ No Automatic Completion of Activity

2. Navigate to the Inspections tab and enter a value in the **Number of Days** for Automatic Rescheduling parameter, to represent the range of days for the automatic rescheduling; for example, enter **14** to include all inspections scheduled in the two weeks from the default or current date.
3. Click **Save** on the *Land Management Parameters* form.
4. Launch Govern and open the *Inspections* function.



3 16680 Building Permit # P057223 10/5/2007 Completed p057223 sean mcDermott Building Inspector NY

Inspection Links **Automatic Re-Scheduling**

Re-Scheduling Information

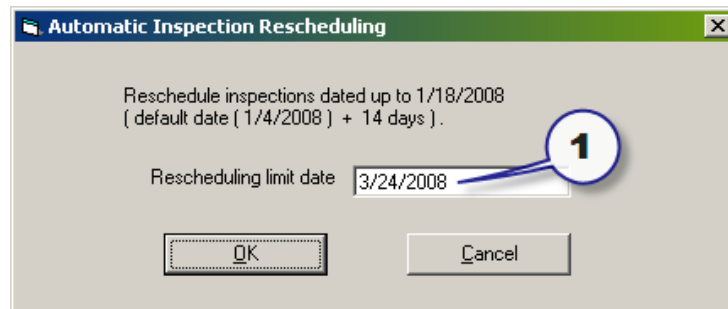
Interval 2 Time Unit Days Final Date 5/21/2008

☐ Stop Re-Scheduling ☐ Re-Scheduled Flag

New Save Delete Multimedia Block Time Schedule Status Exit

5. Enter the interval for rescheduling each inspection and the final inspection date on the **Automatic Rescheduling** tab of each inspection record.

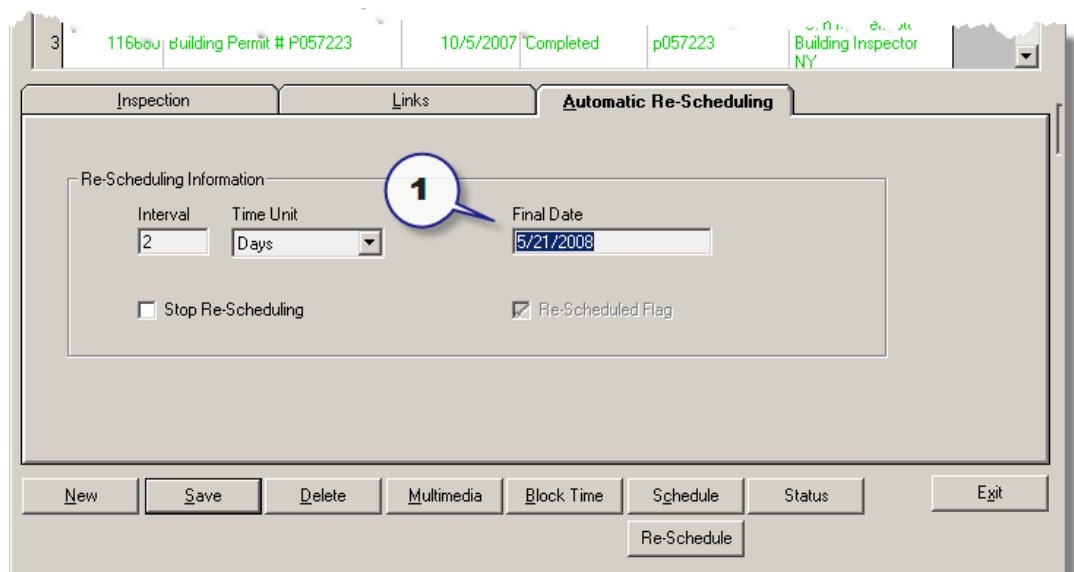
6. Click **Save** on each record.
7. Launch *Govern Batch Processing* and open the *Automatic Inspections Rescheduling* process.



8. Enter the last date for scheduling inspections from the current process. For example, if you will be running the process on a monthly basis, enter the date corresponding to the next time you will be running the process.
9. Click **OK** to start the process.

**Note:** If you have enabled Outlook scheduling, appointments are added to the Inspectors' Outlook Calendars for the rescheduled inspections.

10. Launch *Govern* and open the *Inspections* function.



11. Verify that a new record is created for each rescheduled inspection and that the **Rescheduled Flag** option is selected, on the *Automatic Rescheduling* tab for each of these records.

## Export to an Inspector's Database



### Overview

Run the Export to an Inspector's Database process to extract a copy of a database or a portion of a database, to your computer hard drive. This extracted database can then be copied to a laptop and used by an inspector out in the field.

This process creates a Microsoft Access database file, `<usrid>.mdb`, in the `\govern\database` directory and an initialization file, `<usrid>.ini`, in the `\govern` directory.

`<userid>` refers to the name of the user logged on to Govern when the process is run.

### Prerequisites

In order for the inspector to use the extracted database, without being logged in to network, the following must exist on the inspector's laptop:

- Govern for Windows™, version 9.0 or higher
- `govern32.exe`
- Help files: `govern.hlp` and `govern.cnt`
- Govern bitmap files
- Crystal Report Professional version 10 (the runtime version must be installed on every computer where Govern is installed)
- Any standard or customized reports required by the inspector
- GovMap or other GIS software, if required
- Melissa Address Verification, if required
- GovMap or other GIS software, if required


In addition, the User Registry needs to be updated so that it points to the correct paths for the Govern Help files, bitmaps, standard and custom reports and Melissa data verification, if required. *Refer to the Super User guide for details on updating the User Registry to the Getting Started guide for details on installing Govern, Crystal Report and Melissa Data verification.*

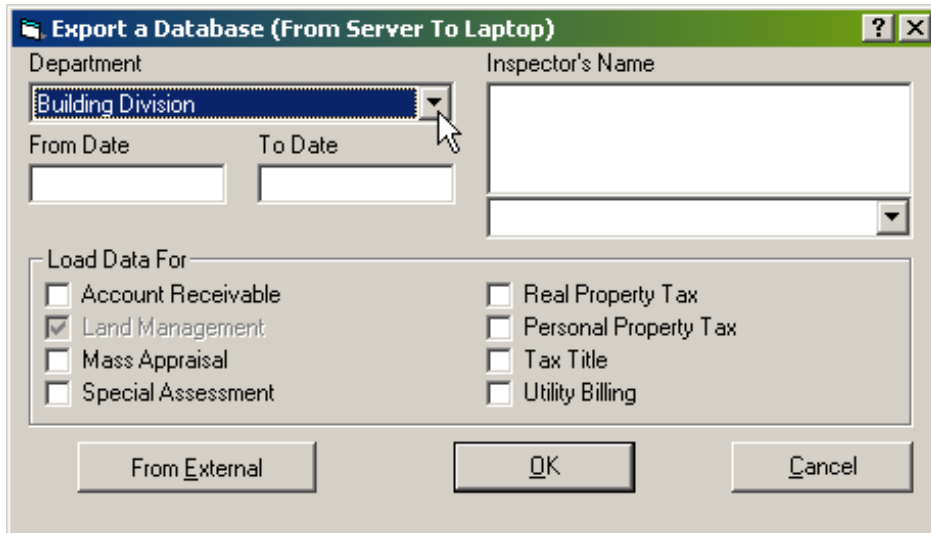
### Running the Process

**Note:** You can also run the three processes for maintaining an Inspector's Database, *Export to an Inspector's Database*, *Import from an Inspector's Database* and *Use an Inspector's Database at Next Startup*, from the **Tools** menu in Govern.

To access this process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click the GovBatch icon  then select *Import / Export* > **Export to an Inspector's Database**.



### Export to an Inspector's Database Parameters

**Department:** Select the department from the drop-down list.

**Inspector's Name:** Select the Inspector's name from the drop-down list. The name will be automatically displayed in the list box above. More than one

Inspector's name can be selected so that data can be shared by many Inspectors.

**From / To Date:** Enter dates in the **From Date** and **To Date** text boxes to narrow the export of data to specific dates only. Double-clicking on either of the text boxes will open a calendar so you can select a date. Dates can also be entered manually (typed) in the text boxes.

**Load Data For:** Land Management is automatically selected and enabled by default. Property Control, Name & Address data are automatically loaded, as are all validation tables. To load other data, select the applicable subsystems.

### Export to an Inspector's Database Command Buttons

**From External:** Click **From External** to use the external recordset (Table: PC\_EXTERNAL).

**OK:** Click **OK** to launch the process.

Running this process creates a database named `userid.mdb` and the following commands in your `win.ini` file:

```
Export MDB=C:\govern\database\userid.mdb
Alternate ini=C:\GOVERN\userid.ini
Last Alternate Function=export
Last Alternate Name Id=526
Last Alternate Starting Date=01/01/1970
Last Alternate Ending Date=01/01/2050
Use alternate ini=yes
```

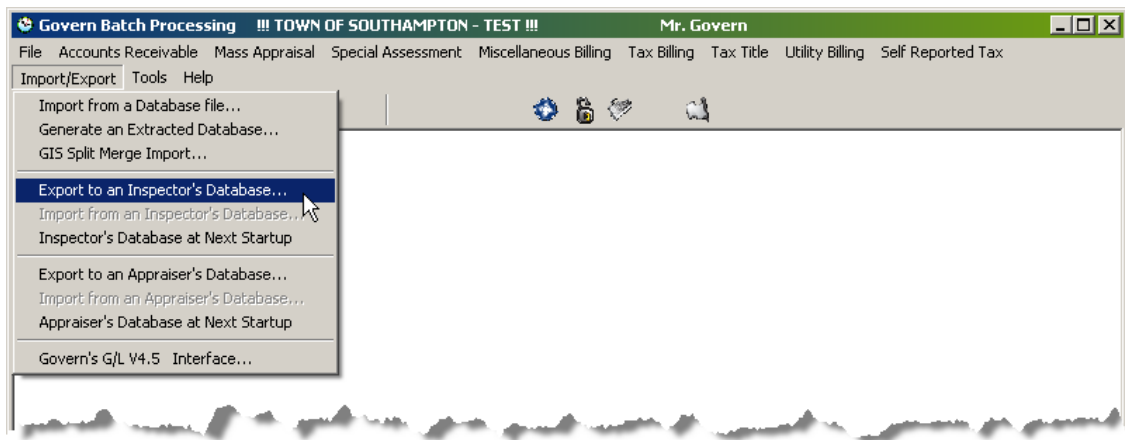
**Note:** After running the Export to an Inspector's Database process, the **Inspector's Database At Next Startup** option is automatically selected on the **Tools** menu. The User will NOT be able to work on the Server's database before he/she completes an Import from an Inspector's Database.

**Cancel:** Click **Cancel** to exit the form without running the process.



### Enhanced Check In / Check Out Inspections Function

The *Use an Inspector's Database at Next Startup* option is automatically enabled when the *Export to an Inspector's Database* process is run. When the field inspector returns to the office with their extracted database, that database will be locked as a precaution. This acts as a reminder to prevent the inspector from omitting to import the data from the laptop.



**Note:** Only Administrators, or users that have been granted access to the form are able to overwrite locked exported data records.

**Note:** For details on configuring a laptop computer to use Govern off site, refer to *Part IV: Installing Govern on a Stand-Alone Computer or Laptop in the Getting Started Guide*.

### Parcel Records can be Locked when Exported

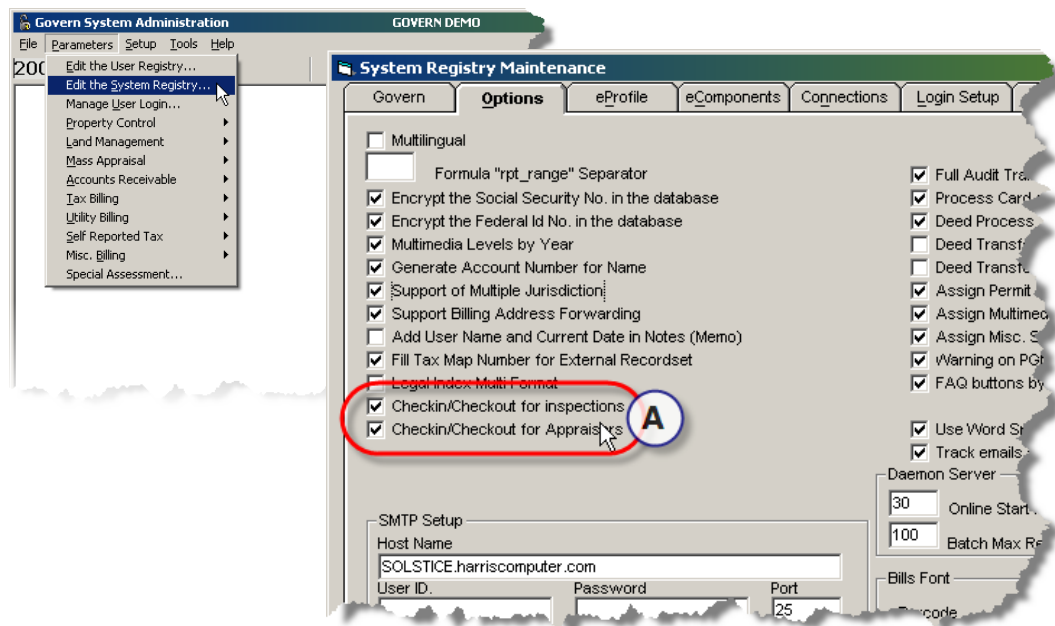
Previously, during an *Export to an Inspector / Export to an Appraiser Database* process, only the Inspection records were locked. In version 10.5 the locking was applied to the parcel record. This means that all *Mass Appraisal (MA)* related functions, and select *Property Control (PC)* and *Personal Property (PP)* tables will also be locked.

The following is a list of the tables that are locked during the export process:

TABLE NAME	DESCRIPTION
<b>Mass Appraisal</b>	
MA_BLDG_AREA	MA Building Area
MA_BLDG_DRAWING	MA Building Drawing
MA_BLDG_INFO	MA Building Information
MA_INC_INFO	MA Income Information
MA_INCOME_DETAIL	MA Income Details
MA_LK_INC_FIELD	MA Linked Income Field
MA_INC_SIMULATION	MA Income Simulation
MA_LD_INFO	MA Land Information
MA_MASTER	MA Master
MA_MISC_STRUCTURES	MA Miscellaneous Structures
MA_OVERRIDE	MA Override
MA_SITE	MA Site
MA_VALUES_TABLE	MA Values Table
MA_LINKS_PERCENT	MA Links Percent
MA_LK_EXEMPTIONS	MA Links Exemptions
MA_BUILDINGS, " _2 ,...	"MA Buildings and subsequent MA_BUILDINGS2, 3, etc. tables
MA_MRA, " _2 ,...	"MA Municipal Rate Adj and subsequent MA MRA2, 3, etc. tables
MA_LAND, " _2 ,...	"MA Land and subsequent MA_LAND2, 3, etc. tables
MA_INCOME, " _2 ,...	"MA Income and subsequent MA_INCOME2, 3, etc. tables
MA_AUDIT_INFO	MA Audit Information
<b>Property Control</b>	
PC_LK_PARCEL_BLDG	PC Linked Parcel Buildings
PC_AREA	PC Area

TABLE NAME	DESCRIPTION
PC_LEGAL_INFO	PC Legal Information
PC_PARCEL	PC Parcel
<b>Personal Property</b>	
PP_ASSESSMENT	PP Assessment
PP_ASSESSMENT_DET	PP Assessment Details

Exported parcels are flagged as exported (Table: PC\_PARCEL) during the Access database export process. This feature is enabled in *Govern Admin*.



To enable the Checkin/Checkout feature...

1. In *Govern Admin*, select *Parameters* > **Edit the System Registry**.
2. In the System Registry Maintenance form, select the options tab.
3. Select the **Checkin/Checkout for Inspections** or **Checkin/Checkout for Appraisers** options to enable these features.

**Note:** If these options are not selected, the behavior of the Checkin/Checkout feature will remain unchanged.

## Inspections



The parcels that are exported are indicated with new checkboxes in associated functions in *Govern for Windows*.

**(1) Building Division.Parcel Information**

**General** | **Notes**

Tax Map Number: 473601 | Swis Code: 473601 | Year Effective: 1997

Subdivision Name: Cove Terrace Development | Section: C | Block: 00 | Lot: 00 | Year Inactive: 9999

Map Number: 213 | Date map filed with SC: 10/27/1925 | Additional Lot Info:

X: 2465242 | Minor Subdivision Name: | Minor Subdivision Map #: | Minor Subdivision Date: |

Y: 290404 | Non-Parcel ID: | Non-Parcel Type: | Jurisdiction Code: |

☐ Non-Parcel Flag | ☒ Approved Subdivision | Split District ID: | Last Split Id Used: | Split District Type: |

☐ Virtual Parcel | ☐ No Mass Appr./Tax Assmt. |

Occupancy Code: | Parcel Index: |

☒ Inspector Check Out | ☒ MA Check Out

Save | Delete | Exit

**Note:** Locked parcels may still be overridden by users with Super User or Administrator level access.

## Import from an Inspector's Database



### Overview


Run the Import from an Inspector's Database process to import a database from an inspector's local drive to the network. The UserID in the following text is the name of the user logged on to Govern when running the process. It uses a file called **userid.mdb** and a **.ini** file called **userid.ini**. These files are created on your hard drive when you run the Export to an Inspector's Database process. The **.mdb** database file is located in the `\govern\data-base` directory, while the **.ini** file is located in the `\govern` directory.

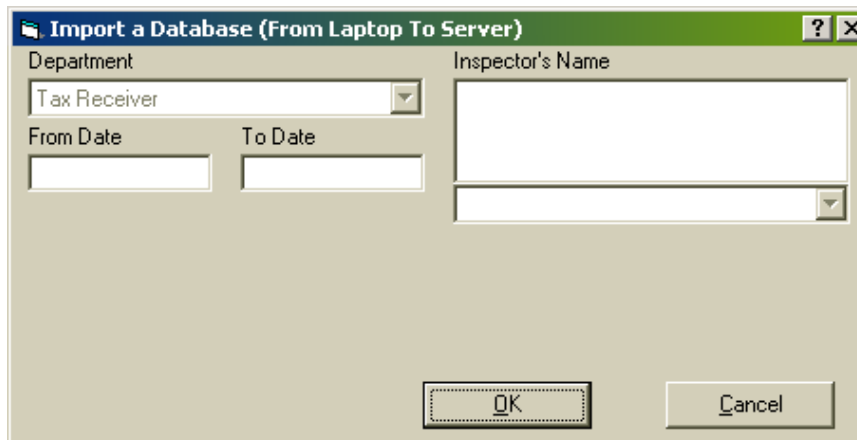
## Running the Process

**Note:** You can also run the three processes for maintaining an Inspector's Database, *Export to an Inspector's Database*, *Import from an Inspector's Database* and *Use an Inspector's Database at Next Startup*, from the **Tools** menu in Govern.

To access the Export to an Inspector's Database process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click the GovBatch icon  then select *Import / Export* > **Import from an Inspector's Database**



**Import a Database (From Laptop To Server)**

Department: Tax Receiver

Inspector's Name: [Text Box]

From Date: [Text Box] To Date: [Text Box]

OK Cancel

### Import from an Inspector's Database Parameters

**Department:** Select the department from the drop-down list.

**Inspector's Name:** Select the Inspector's name from the drop-down list. The name will be automatically displayed in the list box above. More than one Inspector's name can be selected so that data can be shared by many Inspectors.

**From / To Date:** Enter dates in the From Date and To Date text boxes to narrow the export of data to specific dates only or double-click on the fields and select the dates from the pop-up calendar.

### Import from an Inspector's Database Parameters

**OK:** Click **OK** to launch the process.

Running this process changes your `win.ini` file as follows:

```
Export MDB=C:\govern\database\userid.mdb
Alternate ini=C:\GOVERN\userid.ini
Last Alternate Function=import
Last Alternate Name Id=526
Last Alternate Starting Date=01/01/1970
Last Alternate Ending Date=01/01/2050
Use alternate ini=no.
```

**Cancel:** Click **Cancel** to exit the form without running the process.

# Use an Inspector's Database at Next Startup



## Overview

The **Use an Inspector's Database at Next Startup** option is automatically enabled when the *Export to an Inspector's Database* process is run. This acts as a reminder to use the exported database at the next startup and prevents the inspector from omitting to import the data from the laptop.

Before you can use the database on the server, you need first to deselect this option. Then, run the **Import from an Inspector's Database** process.

The database is stored in the `\govern\database` directory.

**Note:** You can also run the three processes for maintaining an Inspector's Database, *Export to an Inspector's Database*, *Import from an Inspector's Database* and *Use an Inspector's Database at Next Startup*, from the **Tools** menu in Govern.

## APPENDIX A: Glossary

Term	Definition
Activity / System Activity	<p>An action or event that is required to complete a permit, workflow or offense process, such as accepting the application, reviewing the plan or performing the inspection.</p> <p>One or more activities, in turn, can be automatically generated from an Activity Step. The Activities can generate e-mail or user notification messages, multimedia codes, reports, business rules, inspection or hearing scheduling, time cost codes, starting and expiration dates, as well as new permit, offense or workflow types.</p>
Activity Setup	<p>A user-defined series of activity steps that are linked together to create the permit, workflow or offense process. The following is a simplified version of the Activities Setup for a permit:</p> <ol style="list-style-type: none"> <li>1. Application Acceptance</li> <li>2. Plan Review</li> <li>3. Zoning Review</li> <li>4. Building Review</li> <li>5. Issuing the Permit</li> <li>6. Final Wire Inspection</li> <li>7. Final Plumbing Inspection</li> <li>8. Final Fire Inspection</li> <li>9. Issuing the Certificate</li> <li>10. End of Activities</li> </ol> <p>The activity steps are displayed on the Activities function in Govern.</p>
Activity Setup	<p>A stage in the process of completing a permit, workflow or offense. Each activity step includes one or several activities.</p> <p>Activity Steps can be automatically generated from previous activity steps or manually started in Govern. They can be set up to automatically generate new activity steps, e-mails, user notification messages, fees and fee methods.</p>
AM Inspection	<p>An inspection scheduled for an unspecified time during the morning of the selected day. Inspections can also be scheduled as PM, Anytime or Time (for a specific time).</p>
Anytime Inspection	<p>An inspection scheduled for an unspecified time during the selected day. Inspections can also be scheduled as AM, PM or Time (for a specific time).</p>



Term	Definition
Application Number	A sequence of alphanumeric characters that is assigned to a permit when the permit application is submitted.
Blocking Time	<p>Indicating that an inspector is not available during a time normally scheduled for inspections. The scheduler or inspector opens the <i>Block Time</i> page and selects the applicable time blocks. These time blocks are also disabled on the Inspection Scheduling screen.</p> <p>If <i>Outlook Scheduling</i> is enabled, the time blocks corresponding to appointments booked through Outlook are also disabled.</p>
Business Rule	Up to six SQL queries or Business Rules can be added to an Activity through the Business Rules form. These can be used, for example, to prevent specific actions from occurring or to update or remove data, according to specified conditions.
Certificate Number	A sequence of alphanumeric characters that is assigned to a permit when the certificate is issued.
Complaint	A formal statement filed against another person or entity, expressing dissatisfaction or a violation of rights. In Govern, complaint types and activities, such as a request to file a response or to appear in court, can be created and maintained. You can create your own appeal types and activities. and assign all the attributes available to the Workflow Type.
Department Calendar	<p>A form for defining the default inspection scheduling parameters for each department and for each territory defined by the department.</p> <p><i>Organizational Calendars</i> and <i>Inspector Schedules</i> are also used for inspection scheduling.</p>
eComplaints	An electronic complaint submitted over the Internet. Govern's eComplaints solution is similar to the ePermits solution. It provides online access to citizens and tracking and maintenance features for Govern users.
eComponents	An electronic component. Govern's eComponent package includes the eProfile, ePayment, ePermit and eComplaint solutions.
eGovernment	Government information and services made available over the Internet.
E-mail	An e-mail message can be associated with an activity or activity step and automatically generated at a specified point, such as the initiation or completion of the activity.

## Inspections



Term	Definition
Fee	<p>A charge that is linked to an activity step and automatically generated at a specified point in the permit process; for example, on completion of the permit application. Fees can be applied either as fixed amounts or through a Fee Method.</p> <p>A fee can also be generated as the result of a failed or incomplete inspection. This type of fee is added to the total fees for the associated permit.</p>
Fee Method	<p>A user-defined procedure for applying fees; for example, fees can be linked to other fees; based on a rate per unit or based on one or more database columns. Alternately, you can apply a formula or logical expression. Minimum and maximum amounts can be applied.</p>
Inspection Elapse Time	<p>The minimum amount of time (in minutes) that it takes to perform an inspection. This must be a multiple of the <b>Inspection Units Duration</b> set on the <i>Land Management Parameters</i> in Govern Admin.</p> <p>The Govern user cannot schedule an inspection or block time on an Inspector's Schedule that is less than the <b>Inspection Elapse Time</b>.</p>
Inspection Status	<p>The inspection status can be set to: Completed, Scheduled, Unscheduled or Voided (Table: VT_SY_ NSTAT):</p> <ul style="list-style-type: none"> <li>• Unscheduled indicates that a date and time have not been defined for the inspection.</li> <li>• Scheduled indicates that the date and time are defined.</li> <li>• Completed indicates the inspection has been performed.</li> <li>• Void indicates the inspection has been nullified. A record is kept of the voided inspection and it can be displayed on reports.</li> </ul> <p>A status can also be assigned to the Inspection Type Result.</p>
Inspection Territory	<p>A user-defined classification used to organize and schedule inspections, according to geographic area. They are defined on the Validation Table Header form and are saved to the Inspection Territory validation table VT_USR_INSPTR, by code, short and long description.</p> <p>You need to assign inspection territories to the parcels and on all inspection calendars and schedules.</p>
Inspection Time	<p>The specific time defined for a Scheduled Inspections. Inspections can also be scheduled for AM, PM or Anytime.</p>
Inspection Type or Code	<p>A user-defined classification for describing the inspection, for example, framing, landscaping, water or damage. Inspection Types are defined, by department in Govern Admin, on the <i>Inspection Code</i> form and are saved to the VT_USR_INSPECT table, by department, code, short and long description.</p>

Term	Definition
Inspection Type Result	A user-defined code, used to rate the inspection, such as Passed, Failed or Incomplete (Table: VT_USR_PMINTYST). This is defined by inspector for each type.
Inspection Unit or Block	A measure of time, used in scheduling an inspection and in blocking time for an inspector. For example, if an inspection block is equal to five minutes, the scheduler selects four blocks in order to schedule a 20 minute inspection. You can not schedule time that is less than an Inspection Block, such as two or three minutes, in this case.
Inspection Unit Duration	The amount of time allotted for an inspection block.
Inspector's Schedule	A form for defining the default inspection scheduling parameters for the inspector. Organizational and Inspector Calendars are also used for inspection scheduling. The Inspector's Schedule has additional parameters for defining a name and address record and maintaining data on the inspector.
Multimedia Codes and sub codes	A classification and subclassification providing options for linking various document types to a permit, inspection or other record.
Organizational Calendar	A classification and subclassification providing options for linking various document types to a permit, inspection or other record.
Outlook Scheduling	<p>Govern can be integrated with Microsoft® Outlook®. Then, when a user schedules an inspection in Govern, the inspectors' <i>Outlook Calendars</i> and <i>Task Lists</i> are automatically verified and updated.</p> <p>In this version, the <i>Mobile Inspection</i> and <i>DeskTop Inspection</i> components cannot be integrated with Outlook.</p>
Permit Number	A sequence of alphanumeric characters that is assigned to a permit when it is issued.
PM Inspection	An inspection scheduled for an unspecified time during the afternoon of the selected day.
Primary Department	In Govern, records are saved by department. Users are assigned to a Primary Department, usually the department where they work and access the majority of records. Govern opens to the Primary Department of the user and to its default data source. Govern Admin and Batch Processing open to the default year assigned to the Primary Department of the user.
Scheduled Inspection	An inspection for which the date and time (or AM, PM or Anytime) are defined, as well as the Inspection ID and inspector
System Activity	See Activity.

## Inspections



Term	Definition
Unscheduled Inspection	An inspection record without a scheduled date and time. An unscheduled inspection can be created manually or generated automatically, from an activity.
User Notification	A departmental or interdepartmental message can be associated with an activity or activity step and automatically generated at a specified point, such as the initiation or completion of the activity or activity step. The message is sent through Govern's <i>Messaging System</i> function.
Workflow	<p>A series of activities that define a business process within an organization. Workflow activities can include tasks, procedures, the request for and input of documents and required tools as well as other processes. Created on <i>Land Management</i> forms, similar to those used for permits, you can associate name types, fees, inspection scheduling, multimedia codes, a new workflow, permit or offense process and link multiple properties as with a permit.</p> <p>A workflow can be initiated through an activity associated with the ePermit application.</p> <p>In Govern, the <i>Workflow Type</i> comprises <i>Complaint</i>, <i>Grievance</i> and <i>Request for Services</i> as well as <i>Workflow</i>.</p>
Zoning	A user-defined classification used in reports and business rules.

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