Planning User Group Permissions by Task - Oregon Standard Model

Action	Planning Super User	Planning Front Counter	Planning Daily User	Planning Internal Reviewer	Planning External Reviewer	Planning Cashier	Planning Cashier Supervisor	Planning Read Only (Internal) *	Planning Read Only (External) *
RECORD DETAILS									
New application creation (back office)	✔	✔	✔	✔		✔	✔		
Update application specific info (ASI)	✔	✔	✔						
Update description of work	✔	✔	✔						
Add transactional info to a record with reference data (i.e. adding additional parcels, addresses, contacts, owners, licensed professionals)	✔	✔	✔						
Add internal comments	✔	✔	✔	✔	✔				
Edit form layouts	✔								
Manually modifiy an expiration date (extends or constricts)	✔								
Record Assignment	✔								
RELATED RECORDS, CLONING, & SETS									
Relate records	✔	✔	✔	✔	✔	✔	✔		
Clone records	✔	✔							
Delete record relationships	✔	✔							
Create/Delete a set	✔	✔				✔	✔		
WORKFLOW									
Update workflow tasks	✔	✔	✔	✔	✔				
Supervisor in to a workflow task and modify workflow comment in Workflow History	✔								
Add and update an adhoc task	✔	✔	✔	✔	✔				
Access to application status portlet (status should not be updated in this manner except in rare cases)	✔								

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INSPECTIONS									
Add inspections (pending)	✓	✓	✓						
Pend/Schedule Inspections from **ANY** inspection group	✓								
Pend/Schedule **only** from the inspection group associated to that particular record type		✓	✓						
Schedule/reschedule inspections	✓	✓	✓						
Delete inspections	✓								
Cancel inspections	✓	✓	✓						
Result inspections	✓		✓						
Edit inspection results after the fact	✓								
View inspections but take no action	**N/A**	**N/A**	**N/A**	✓	✓				
CONDITIONS - RECORD									
Add conditions	✓	✓	✓	✓	✓	✓	✓		
Resolve ("Unapply") own conditions	✓	✓	✓	✓	✓	✓	✓		
Resolve ("Unapply") others' conditions	✓								
CONDITIONS - REFERENCE **									
Add/Update/Resolve conditions	✓	✓	✓				✓		
Read Only Access	**N/A**	**N/A**	**N/A**	✓	✓	✓	**N/A**		
Delete conditions									
REPORTING									
Run all reports	✓								
Run specific reports *(Use different report portlets or set at individual report level)*	**N/A**	✓	✓	✓	✓	✓	✓		
Access to Ad hoc Reports	✓	✓	✓	✓	✓	✓	✓		

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REFERENCE DATA									
Add an address to reference data	✓	✓							
Add a parcel to reference data	✓	✓							
Add an owner to reference data	✓	✓							
Add a contact to reference data	✓	✓	✓	✓	✓				
Add a professional to reference data	✓	✓	✓	✓	✓				
MONEY MATTERS									
Add fees after intake	✓	✓	✓			✓	✓		
Delete "new" fees	✓	✓	✓			✓	✓		
Process a payment	✓	✓				✓	✓		
Process a fund transfer	✓	✓				✓	✓		
Process a refund	✓	✓				✓	✓		
Void/credit paid fees	✓								
Void/credit unpaid fees	✓	✓				✓	✓		
Void a payment	✓						✓		
Apply unapplied fees	✓	✓				✓	✓		
Process a Point of Sale payment	✓	✓				✓	✓		
Process a Point of Sale refund	✓	✓				✓	✓		
Process a set payment	✓	✓				✓	✓		
Access assess fee history	✓	✓				✓	✓		
Access payment history	✓	✓				✓	✓		
View transactions	✓	✓	✓	✓	✓	✓	✓	✓	

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DOCUMENTS									
Upload documents	✓	✓	✓	✓	✓	✓	✓		
Download documents	✓	✓	✓	✓	✓	✓	✓	✓	
Review (EDR) documents	✓	✓	✓	✓	✓				
Delete documents	✓	✓							
Assign document to specific user (same department)	✓	✓	✓	✓	✓				
Assign document to specific user (regardless of department)	✓	✓							
Change ACA permissions for a specific document	✓								
GENERAL									
Change password	✓	✓	✓	✓	✓	✓	✓	✓	✓
Search via QuickQueries	✓	✓	✓	✓	✓	✓	✓	✓	✓
Create personal QuickQueries	✓	✓	✓	✓	✓	✓	✓	✓	✓

Notes:

Read Only (Internal) access: Record list portlet, record summary, description of work, conditions, documents (view document list only), inspections, payment, related
Read Only (External) access: Record list portlet, record summary, fees page.