

**User Group Permissions by Task - OSM**

Action	Permit Tech	Supervisor	Super Permit Tech	Plan Reviewer	Inspector	Inspector Supervisor	Reviewer Inspector	Reviewer Inspector Supervisor	Third Party	Cashier	Cashier Supervisor	Read Only (Internal) *	Read Only (External) *	Public User *
<b>RECORD DETAILS</b>														
New application creation (back office)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Update application specific info (ASI), description of work, and other transactional data	✓	✓	✓	✓	✓	✓	✓	✓	✓					
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		✓	✓											
Issue a permit	✓	✓	✓											
Manually modify an expiration date (extends or constricts)		✓	✓											
Edit Document Group/Category, Description and Status of Permits	✓	✓	✓			✓		✓			✓			
Receives alerts for ACA actions (new applications, upoladed documents, payments received)	✓	✓	✓											
<b>VALUATION CALCULATOR</b>														
Use valuation calculator (add values)	✓	✓	✓	✓	✓		✓		✓					
Change unit cost within valuation calculator		✓	✓											
<b>WORKFLOW</b>														
Update workflow tasks	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Supervisor in to a workflow task		✓	✓					✓						
Modify workflow comment in workflow history		✓	✓	✓			✓	✓	✓					
Add an adhoc task	✓	✓	✓	✓	✓	✓	✓	✓	✓					
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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<b>INSPECTIONS</b>														
Add inspections (pending)	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Delete inspections		✓	✓			✓		✓						
Schedule/reschedule inspections	✓	✓	✓	✓	✓	✓	✓	✓	✓					*
Cancel inspections	✓	✓	✓	✓	✓	✓	✓	✓	✓					*
Result inspections		✓	✓		✓	✓	✓	✓	✓					
Result unscheduled inspections		✓	✓		✓	✓	✓	✓	✓					
Edit inspection results after the fact		✓	✓			✓		✓						
View inspections but take no action	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A					*
<b>MONEY MATTERS</b>														
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	✓	✓	✓							✓	✓			
Generate a receipt	✓	✓	✓							✓	✓			
Process a credit card in the back office (optional)	✓	✓	✓							✓	✓			
Process a Point of Sale payment	✓	✓	✓							✓	✓			
Process a Point of Sale refund		✓	✓								✓			

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Process a set payment	✓	✓	✓							✓	✓			
Access assess fee history	✓	✓	✓							✓	✓			
Access payment history	✓	✓	✓							✓	✓			
View transactions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
<b>REPORTING</b>														
Run all reports		✓	✓											
Access AdHoc reports		✓	✓									✓		
Run specific reports	✓	N/A	N/A	✓	✓	✓	✓	✓	✓	✓	✓			
<b>REFERENCE DATA</b>														
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	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Link a public user to an owner	✓	✓	✓											
Access public user information		✓	✓											
<b>DOCUMENTS</b>														
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		✓	✓											

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<b>CONDITIONS</b>														
Add conditions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Resolve ("Unapply") own conditions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Resolve ("Unapply") others' conditions		✓	✓											
<b>Delete conditions</b>														
<b>RELATED RECORDS, CLONING, &amp; SETS</b>														
Relate records	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Clone records	✓	✓	✓											
Delete record relationships	✓	✓	✓											
Create a set	✓	✓	✓							✓	✓			
Delete a set	✓	✓	✓							✓	✓			
<b>GENERAL</b>														
Change password	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	*
Search via QuickQueries	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Create personal QuickQueries	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

**\*Notes:**

**Read Only (Internal) access:** Building permits record list portlet, record summary, description of work, addtl info, conditions, documents (view document list only), inspections, payment, related records, valuation calculator, workflow, workflow history, access to some QuickQueries, access to APO reference data and licensed professional information.

**Read Only (External) access:** Building permits record list portlet, record summary, fees page.

**PublicUser access:** access through citizen access portal only.