As with any computer system, Oregon ePermitting has a vocabulary all its own. Knowing the terminology used by technicians and experienced system users will be important as you progress through training classes and read ePermitting user documentation.

AA – Accela Automation. The software system used by Oregon ePermitting. Accela also maintains the hosted servers that house all five system environments.

ACA – Accela Citizen Access. The main “citizen-facing” online web portal where contractors & the public interface with the “back office” system used by jurisdictions. It allows customers to apply for, pay, and track permits online 24 hours a day, 7 days a week.

Accela Community – A collaboration website provided by Accela where users can browse the knowledge base, submit ideas & questions, view blogs, find documentation downloads, etc. Registration is required, but provided freely to all Accela product users.

ADS – Accela Document Service. A document repository for storage & recall of all system documents and reports that are associated with each ePermitting record. The Accela Document Service is one of the supported third-party document systems maintained by Accela Automation. See EDMS.

Agency – Used to reference a specific jurisdiction’s configuration within the statewide Super Agency configuration utilized by Oregon ePermitting. This is the first required field when logging in to the back office and is the jurisdiction’s Service Provider Code. For example, Lane County is an agency, but their login information is LANE_CO.

AGIS – Accela Geographic Information System. An interface that integrates with Accela Automation to provide automated maps from a central database. This system provides a geographic representation of all land-use, zoning, and infrastructure information associated with a parcel, permit, inspection, or plan. Also called Accela GIS (AGIS).

AV360 - Accela Automation Vantage360. Provides configuration tools for administrators to use in setting up personalized consoles– to access and display agency information– form layouts, and more. Additionally, provides access to report settings and batch processing.

AMO - Accela Mobile Office. A mobile application that integrates with Accela Automation to extend inspection result capabilities to the field. AMO runs on various operating systems, including Pocket PC, Windows 2000, and Windows XP, making it compatible with a variety of mobile devices such as PDAs, Tablet PCs, and laptops.

Anonymous User - An anonymous user is a public user who utilizes the components of ACA, that do not require a registered ACA account. They can search for and track permits, make payments, schedule inspections, and upload documents. This capability allows those individuals that are involved with a building permit, such as a property owner or architect, participate without having to register for an ePermitting account. See Public User and Registered User.

APO - Address, Parcel, and Owner. Addresses are physical locations related to parcels. Parcels are a piece of land with a specific location and legally defined boundaries. A parcel may have multiple addresses. Owners are linked to specific parcels and can be considered the main person responsible for a parcel, and often serves as a point of contact.

Application - A term identifying the initial application submittal and intake phase of a record prior to the building permit being issued. We often refer to this phase as the “virtual counter,” symbolizing the practice of submitting paper applications to the building department and dropping them off with an individual or leaving them in an inbox.
Application Intake Form - An application intake form allows users to provide information and select services related to their building permit project. It is organized into sections that correspond to building department processes. It is organized into sections that correspond to building department processes. Some information is required, while other pieces are optional. Fees will be automatically assessed depending on the services selected.

Application Accepted – A status indicating that an application was received and has been accepted by the local city or county building department.

Application Status – The status of the record overall. It reflects the progress of the record in the workflow. While closely related, an application status is different than a task status. See Task Status.

Application Submitted – A status indicating that an application has been submitted to the local city or county building department and is awaiting processing.

ASI - Application Specific Information. Used to collect information about a project, ASI consists of fields designed to gather information from the applicant. These fields can be in several formats: text description, text, number, radio (y/n) button, checkbox, or dropdown. ASI is often unique to a record type or to a group of similar record types. Users fill in these custom ASI fields when they create and update records. See Record Type.

ATBW – Authorization to Begin Work. A document that is generated by the system at the end of some ACA application processes after a registered user pays applications fees. The ATBW serves as a pre-permit document allowing work to begin on the jobsite while the jurisdiction begins creating the “actual” permit which is sent to the applicant 1-2 days later.

Attribute - A special characteristic of an reference information such as a parcel. This includes information such as fire districts, sewer districts, flood plains, etc. that may be information or dictate the type of activity they can conduct on that particular site. These attributes are in addition to the “template” information included in the reference information.

Back Office – The record control-center where both back office and ACA applications are processed and managed via workflow. All aspects of permit application, fee assessment, payment transactions, plan review, permit issuance, and inspection management are managed from this workspace.

Basic Service – A jurisdiction that participates in ePermitting but offers only limited building permitting services not requiring plan review. A basic service profile has no back office functionality and provides only ACA permit application capability resulting in a jurisdiction-specific authorization emailed by the system to the contractor and the jurisdiction immediately after completion of the online application process.

CAP – The term “Record” replaces CAP; however, some parts of the system still use this terminology. CAP represented the parts of a basic record. The term Record now defines a broader range of items or forms that users manage within Accela Automation, such as an application or permit. See also Record or Permit.

Cloning - The act of duplicating parts of, or all of, a record by using an existing record as a template. When you clone a record, you are creating a new duplicate record. Cloning allows for using some or all of the template record’s information as a starting point for the new record being created. This creates a parent-child relationship between the original record (parent) and the new duplicated record (child). See Related Records
Conditions - An indicator that can be placed on records, licensed professionals, and reference data to help ensure requirements are met before an application can proceed. Conditions are set based on the severity level selected when applying the condition. The default condition severities are Hold, Lock, Notice, and Required. Each condition severity functions differently, allowing or limiting access to pieces of the record as appropriate. The Notice condition, for example, is a visual reminder only and does not stop record progress. Conditions can be viewed in both ACA and the back office or just ACA, or just the back office.

Contact – A person associated with a permit job site. A contact can range from the applicant to the owner to a contractor not listed in the state database. Contacts can be saved in reference data or added transactionally to a record. Often the contact is someone who can be called for information about the site or can provide access to the site for inspections.

Console - The layout of the page in the back office that includes the links and portlets containing all the detailed information the user has access to as established by their user permissions. Consoles can be different from user group to user group. See User Group/User Permissions.

Credentials – A unique user id & password combination assigned to users for each system environment. A user profile must be created by an administrator in the system environment where access is needed.

CSV - Comma Separated Value. A file format used as a portable representation of a database. Each line is one entry or record and the fields in a record are separated by commas. Commas may be followed by arbitrary space or tab characters which are ignored. If a field includes a comma, the whole field must be surrounded with double quotes.

CSV Export - Allows users to export a list of information quickly into Excel without using a report. Any list portlet in Accela allows you to pull this data out of the system. The system will provide information for each column listed on the list portlet.

CVV – Card Verification Value. A 3-4 digit number on credit cards to provide an extra measure of security for online transactions. The CVV can be found on the back of Visa, Master Card, & Discover cards.

Database - A dynamic collection of data arranged in relational tables composed of rows and columns.

Delegate User - An ePermitting user with permissions to perform operations in multiple agencies with a single user login. A delegate user can also be assigned to a public user group for ACA so they can create and view record information across multiple agencies.

Document Upload & Download – This is a process allowing a system user to copy documents both to and from the system.

EDMS - Electronic Document Management. An automated system supporting the creation, use, and maintenance of electronically-created documents.

EDR – Electronic Document Review. A digital plan review process, made available by Oregon ePermitting, utilizing a locally installed, licensed copy of Adobe Pro X. This tool allows reviewers to open, review, and mark up PDF plans submitted via email, attached via back office tools, or uploaded to a specific record from the ACA web portal.

EMSE - Event Manager and Script Engine. A tool-set automating and simplifying system processes. Scripts are programmed to run at various points in a permitting process for managing and controlling specific back office & ACA events.

End of Day Report - A very important report used to verify and settle transactions at the “end of the day” after the front-desk closes for the fiscal work day. Remember that the ePermitting system is 24 x 7, so the work day for online payments will be set by administrative rule. Only available for Basic Services.
Environment – ePermitting technicians utilize several separate different areas for various pieces of the implementation process. These “environments” are used to conduct training, develop configurations, test new versions of Accela, and more. The Production environment is the “live” system used by jurisdictions and the public for permit management.

The Staging environment closely “mirrors” production, so that minor changes and updates can be tested to verify system functionality. This is often where jurisdictions test new functionality, scripting changes, or enhancement. The Configuration environment is used for developing system functionality and configuration, setting up specialized testing, and is often used to set up an environment for training and user education.

The Development environment is used for specialized system testing. This is where new versions of Accela are first placed to begin the testing process.

The Training environment is usually a copy of the configuration environment where jurisdictional users are required to spend time familiarizing themselves with all phases of the ePermitting model. Training classes for new users are performed in this environment where all class members get a student profile and credentials allowing them access to training.

Fee Item – The price that must be paid for a specific service or permit-related item, as specified in an agency’s fee schedule. Each individual fee listed is identified in Accela as a fee item.

Fee Schedule – The compilation of all building permit fees based provided per the requirements of the Consistent Form and Fee Methodology found in rule.

FID - Functional Identifier. A four-digit identification number used to enable specific fields, security permissions, or functionality. These are divided between Admin and Daily permissions; however a combination of both may be required to establish correct permission settings.

Full Service – A jurisdiction that participates in the ePermitting system and offers a full range of building permit service functionality. A full service profile has a functional back office system and provides ACA functionality that includes online permit application and tracking, inspection scheduling, fee payment, and document upload (plans, forms, affidavits, etc.).

GIS - Geographic Information System. A program & interface that manages and tracks mapping data.

ePermitting Community – A web-based site, using state software known as GovSpace, allowing multi-agency and multi-jurisdictional collaboration. It provides a document repository for sharing files, blogging tools to provide a one-stop information location, a community board for ongoing discussion threads, and other collaboration efficiency tools.

Helpdesk Ticket – A tool used by live jurisdictions to submit trackable help requests to the Oregon ePermitting helpdesk. Helpdesk requests are assigned a record number and tracked in a back office environment similar a jurisdictional back office.

Hosted – A term used to define a contractual maintenance agreement where use of one or more computer servers is leased, often at an offsite location. For example, the ePermitting system is located on servers owned and managed by Accela in Utah.

iLinc –An interactive web-meeting service combining integrating video, PC desktop, application sharing, and other collaborative tools. iLinc is the web-based training tool selected by “ePermitting University” for presenting trainer-guided classes to jurisdictions choosing to participate in upcoming implementation groups.
**ePermitting Basic Terminology**

**Inspection Calendar** – A setup element that **must** be created in order to “activate” online inspection scheduling functionality. It controls which days of the week & the hours per day that inspections can be scheduled via the back office. using ACA, or over the phone via IVR. Depending upon a jurisdiction’s specific settings, they may have additional flexibility to schedule inspection in the back office when their customers cannot. Multiple calendars may be needed for some jurisdictions. Per statewide standard, same day inspections must be scheduled by 7:00 a.m.

**Inspection Districts** – Inspection calendars require at least one district be assigned to the scheduling calendar to allow for auto-assigning inspections to system users. **District 0** has been adopted as a template to provide that functionality, although a jurisdiction can add more than one district as required per their business processes.

**Inspection Discipline**- Identifies the scope of an individual inspection and creates a relationship to an individual inspector’s profile. Each inspection must have a discipline associated with it.

**Inspection Type** - A specific kind of inspection categorized by both trade & inspection codes. Naming conventions and code numbering are determined by statewide standards and cannot be altered by jurisdictions. The codes are critical for using the IVR system.

**Inspector Profile** – A special profile-setting in addition to a user profile that connects inspectors to inspection disciplines(electrical, mechanical, plumbing, structural, etc.), districts, workload limitations, and the inspection calendar.

**Internal Credit Card Payment**- A payment process where credit card payment information and associated billing information is processed through the ePermitting back office. Jurisdiction staff inputs the credit card number, expiration date, CVV, and billing information, so it can be sent to the Virtual Merchant (VM) payment service provider to approve or decline the credit card payment. The VM service provider returns an approval or denial code to the ePermitting back office where only the approval code, payment amount, and payer information is digitally stored.

**IVR** - Interactive Voice Response System. A statewide voice recognition system provided by Selectron Technologies that allows jurisdiction staff and public users to perform tasks associated with scheduling and resulting inspections over the telephone. A unique 12-digit **IVR** number is generated for each record in the system to facilitate the use of this third-party interface along with the inspection code.

**Jurisdictional ID** – Each jurisdiction, whether currently participating in the ePermitting system or not, has a unique code used to identify them in the database. All full service jurisdictions have a 3-digit code used as a functional prefix to identify all their records, permits, ATBWs, IVR, reports, etc.

**LBDD** – Local Building Department Directory. A web page provided on the Oregon ePermitting website as a “Building Dept. Directory” web link. It allows all jurisdictions with a building program to list current local building department information on the state site.

An LBDD Admin tool is provided to all jurisdictions allowing them to update **five** informational tabs: Info – general contact info, a website link, and notes; Permits – links to printable fee schedules & permit info; Locations – general office info; Staff – staff titles, phones, and email; Related Links – a place to provide additional documents for public use. The LBDD admin tool also allows jurisdictions to add new addresses to the system on a one-off basis and remove services from individual addresses already listed in the ePermitting database. These changes are loaded nightly and are available the next business day for customers to use.

**License Types** – A license granted for specific services, trades, or types of construction. License types are categorized by licensing agency then by a specific license classification. A common example is that specific electrical licenses issued by BCD are limited to the types of services they are able to purchase; however, this is not confined to BCD licenses and can include CCB, Architects, and Engineers. In the
system, license types are used to identify who can purchase specific services. Another term for this is “purchasing category.”

**Licensed Professional** - A licensed contractor, engineer, architect, etc. who is registered with an enforcement agency that ensures compliance with state and local regulations.

**List Portlet** - A back office workspace that contains a specific list of items.

**Lock** - A red color-coded condition that prevents users from performing nearly all functions on the item to which it is associated. This is the highest severity available for a condition. See Conditions.

**Lookup** - Allows a user to search for and view system information. For example, on the intake form lookup is used to locate a reference address, also bringing back the parcel and owner if applicable. See Search and Select.

**Main Link** - A link on the web page that contains a group of portlets that relate to one theme. A console may contain multiple main links found at the top of each page. Switch between main links by clicking on a different main link name at the top of the page. Examples: Home, Addresses, Parcels, My Tasks, etc.

**Menu Navigation** – The “Go-To” menu is found on most form portlets within a record. Like My Navigation, it provides a path to various portlets within a building permit record. Menu Navigation is limited to Out of the Box functionality and cannot be set up as specifically as other navigation options.

**Module** – Accela add-on products that work together for a specific purpose. All modules share the same interface and several other major features. In addition to the similarities, each module lets you perform a specialized set of tasks related to land management, planning, permitting, or other agency-specific tasks. Some of the modules available from Accela Automation are Asset Management, Land Management, Licensing & Case Management, and Public Health & Safety.

**My Navigation** – A portlet that provide links to various parts of a building permit record. The links available can vary by user permissions. Because it uses links, My Navigation can drill down to specific locations to reduce clicking. For example, rather than having to go to the transactions portlet to begin the payment, My Navigation links directly to the payment page with the “pay fees now” link.

**Navigation** – The process of moving from screen to screen or portlet to portlet within the back office or ACA using hyperlinks, tabs, function buttons, and browser tools. Navigation within a record is provided in two formats in the back office: My Navigation and Menu Navigation (also known as “Go-to Menu). Additionally, other parts of the system can be navigated to, such as the Inspections or My Task pages (the Main Links).

**Notice** - A green color-coded condition often indicating special instructions to a back office user related to that specific item. It could be a parcel condition that serves as a reminder that the property is located in a flood plain or a condition on a record indicating that a revision has been submitted. This is the lightest severity available for a condition. See Conditions.

**Parameter** – Required fields that must be supplied before submitting a report.
Example parameter values are: Start Date, End Date, Start Time, End Time, etc.

**Parcel Number** - A unique designation of a specific parcel that is sometimes referred to as the map tax lot number, parcel number, tax account number, or another unique identifier for the plot of land.

**Permit** – A phase of the record management life-cycle where all required steps have been completed to generate a building permit to be printed and displayed at the job site. This phase of the process follows the application phase and ends after all inspections have been approved, certifications completed, and requirements done. Once all the workflow steps are completed then the record can be closed (final step).
Portal – Also called web portal, it is a web site that brings information together from multiple sources for a unified purpose. The ePermitting ACA web portal brings together elements from multiple databases to provide active trade license validation, jurisdiction specific addresses & fee schedules, payment processing, and record specific report creation.

Portlet - A section of the system web page dedicated to display specific information and/or perform tasks. Portlets divide main links into smaller functional areas and act as containers, or frames, for certain operations, files, or links.

POS – Point of Sale. Refers to items available for sale that are not related to a record like booklets, copies, or maps. (Typically there is no need to keep track of the purchaser or location of work.)

Primary Address - The key location for a job site application, permit, or record. Sometimes referred to as the project address, street address, or site address.

Project - A group of related permits and applications collected together for a large development. Each project has a unique name and a project number.

Property owner affidavit – Oregon law requires construction permit applicants who are not licensed with the Construction Contractors Board to sign a state form declaring they are the legal property owner who will abide by the responsibilities listed in the form and therefore, can be granted legal rights to apply for a building permit to perform work on their own property.

Part 1: Information Notice to Owners about Construction Responsibilities - ORS 701.325(3).

Part 2: Property Owner Statement Regarding Construction Responsibilities - ORS 701.325 (2).

Online Form: http://ccbed.ccb.state.or.us/WebPDF/CCB/Publications/property_owner%20adopted%20209-23-08.pdf

Public User - Anyone who uses the public facing ACA web pages, IVR, etc., is defined as a public user. Public users include anonymous users and registered users who either utilize the ACA web site or who use the IVR system call flow. System administrators can control functional restrictions for both types of users. See Anonymous User and Registered User.

Search - A way of finding and displaying information as a specific ordered listing. A query “reads” through index data searching for a match to the key words used in the query search. When found, the item is added to the results list.

Quick Query - A pre-defined “custom” search created by an administrator that helps users quickly access specific items lists. Examples: Active Records, My Records, Not Processed, etc.

Record - A term that identifies a specific data-set in the system and is tracked by a unique jurisdiction identifier. A record is maintained throughout the lifecycle of an application which changes to a permit at a specific phase of the process. When all required permit steps are completed the record is finally closed and maintained as a historical record of the process.

Record ID - The identification number of a record. There is a system default format and there is a format mask that can be applied to create a custom record number. ePermitting uses a standard base format of: 123 – ABC – YY – NNNN → 123(juris id) ABC(record type) YY (record year) NNNN (sequence #).

Reference Data - Searchable data that can be found, then copied into a record. For example, a parcel record is created with information on the location and size of the parcel. This information is reference data. When a user creates an application to build a house on the parcel, the information contained in the parcel record can then be searched for, located, then copied into the building application.

Registered User - A public user who has completed the sign-up process to create an ACA account is considered a registered user. System administrators control the functionality available to all users. See Public User and Anonymous User.
Report - A dynamic onscreen or printed document, in a designated layout, of either the most current or the last save-state of collected historic record data.

Report Manager - A service within ePermitting interfacing with a report engine – like Crystal Reports. Crystal Report files are set up in Report Manager and initiated from ePermitting back office portlets.

Required - A condition that indicates a certain activity or field must be completed before the user can proceed to the next activity in the application steps. See Condition Types.

Scripted or Scripting – Many of the automatic processes are controlled by strings of computer code or scripts that ePermitting technicians write “in the background” to make things happen - like plan review fees automatically calculating based on the applicable fee item totals.

Search and Select - These functions allow users to look up addresses and associate one or more with a record or permit by marking the check box next to the desired addresses. See Lookup.

Set – A group of records.

Service Provider Code (SERV_PROV_CODE) – Agency identifier typically the name such as “TALENT”, “LAKE_OSWEGO”, or “LANE_CO”.

Set Processing - A function that allows agencies to organize multiple permit applications into a group. Sets can be used to group fees or simultaneously update the workflow for several permit applications at a time.

SmartChart - A graphical representation of data allowing a user to filter and list specific items. Examples: Count of new permits this quarter, The number of permits on Hold this month, Closed records by month this year, etc.

SPEAR - Single Portlet Entry and Review form. An Accela Vantage360 feature only. See Application Intake Form.

Standard Choice - Configurations used by administrators to set up feature functionality such as options available in drop-down lists, default values for a field, automated fee calculations, etc.

State Surcharge – A State surcharge fee of 12% is applied to all building permit types issues in the State of Oregon. Permits are issued any time a construction activity under the state building code is authorized and will be inspected.

Status - Status describes a state of a permit or inspection or workflow task. A status might indicate a phase of a process, such as “Pending,” or it might indicate a decision-point, such as “Accepted” or “Failed.”

Standard Comments – This reference list is a collection of the most recent Building Codes Division “Write it Cite it” code citations in five specialty code areas - structural, electrical, mechanical, plumbing, and residential. This list of code reference citations can be used to add code citations to system record comment fields again and again as required when citing a correction notice associated with plan reviews, inspection results, etc.

Supervisor button – An override button that gives extra permissions to an individual allowing them to reset a workflow task to a previous state, edit a date field that is normally read-only, etc.

Task Status – The current “phase” of the workflow within the assigned task. At “Application Intake” the task status can be: Addl Info Needed, Addl Info Received, Application Accepted, Application Submitted, Ready for Plan Review, Ready to Issue, Void or Withdrawn.
**Time Tracking** – A record-tracking time counter is controlled by the current task status. If the task is dependent on someone working on the record in the back office (like plan review, fee assessment, etc.), the counter is “running”, but if the task is waiting for the applicant to submit a required document, or pay a fee, etc. the time tracker can be stopped by setting the appropriate task status.

**TSI** – Task Specific Information. Custom fields created for use with workflow tasks.

**Transaction Data** - Data in added to a record that associated with that single record only. It is not reference data library, so cannot be searched on or reused again and again. Any data that has potential for reuse should be added as reference data to make it permanent and searchable for later use. See Reference Data.

**Third-party Supporting Software** - Add-on and plug-in products not supplied by Accela Automation or the user.

**UAT** – User Acceptance Testing. A phase of system implementation where jurisdictional users process each and every record type, plus using all aspects of the record management functionality to ensure the program works as expected and can be “accepted” as complete and ready for deployment.

**User Permissions** – The access controls that are set by administrators allowing individual users to perform specific tasks in the system are set up in user groups. Once established, each user is associated to one user group. A user cannot be in more than one user group within the same Accela module.

**Updates** – As with any software solution, Accela Automation is constantly changing and evolving to make the system better and more efficient. As technical changes are made available, Oregon ePermitting technicians copy these updates into a test system to verify they don’t negatively impact current functionality. The update process requires jurisdictions to test their operational functionality in the Staging environment before the update is finally moved into Production. Jurisdictions typically have 4-6 weeks to complete the required testing.

**User** - An employee of an agency, at a local, state, or federal level, who is credentialed to login and use the ePermitting system.

**User Group** – A required permissions setup element that *groups* users with similar task-roles into functional permissions groups – i.e., front counter, permit technician, supervisor, admin.

**User Profile** – Administrative setup providing an individual access to the system within a defined user group and with assigned user-level permissions.

**Valuation Calculator** - The job value for a project may be submitted by a contractor or calculated based on input values that are compared to the annual April ICC Building Valuation data. The ePermitting system valuation calculator allows for the calculation of applicable pieces of a project. For example, multiplying a quantity such as floor area, linear feet of water pipe, or hours of labor by a unit cost such as $25 per linear foot.

**Virtual Merchant.** A hosted, second-party, PCI compliant, payment solution managed by Elavon, is used for the verification and transaction processing of all ePermitting payments.

**Wildcard** – A special character that can be substituted in a search to represent 1 or more unknown characters that may, or may not be, part of the “actual” item being searched for. Different databases assign their own unique wildcard characters – the ePermitting system uses a percent symbol - %, wildcard character. Example: If you wanted to find all items that contained “record” in front or behind other words, you would search for: `%record%`, which would return - *record* no., *record* type, my *record*, a *record*, etc.
**Web services** - Web services are used primarily as a means for businesses to communicate with each other and with clients. Web services allow organizations to communicate data without intimate knowledge of each other's IT systems behind the firewall. Web services also allow different applications from different sources to communicate with each other without time-consuming custom coding, and because all communication is in XML, web services are not tied to any one operating system or programming language. Accela is beginning to use web services more often to exchange information from the backend database with add-on products and with third-party vendors.

**Workflow** - A set of record-related tasks that must be completed in sequential order to move a permit application through the system. Workflow functions, much like a “processing checklist”, guiding both the jurisdiction and their ACA customers through the required record processing steps from intake to plan review, issuance, inspection, etc.

**Write it Cite it** – A reference list of the most recent Building Codes Division “Write it Cite it” code citations in five specialty code areas - structural, electrical, mechanical, plumbing, and residential. State rules require the applicable code reference to be provided or “cited” in order to take the guesswork out of construction correction notices.