



Overview of Processes

IDENTIFY THE STATUS OF A PERMIT

1. To determine the status of a permit, complete a search for it using the Permit module. The permit status appears in the status column of the permit search results.

Folder Number	Final Date	In Date	Issued	Status	Folder Name
2019 203565 000 00...		08/02/2019	08/02/2019	Issued	1438 NW 23RD AVE

2. Double-click the **permit row** in the search results. The permit folder opens and again displays the permit status.

The screenshot shows a software interface for a permit folder. At the top, it says 'Permit Folder' and '1438 NW 23RD AVE [P...'. Below that, there are navigation tabs: 'Folder', 'Property(1)', 'People(1)', 'Info', 'Fee', 'Process(4)', 'Process Select', 'Document', and 'Comm'. The 'Process(4)' tab is highlighted in a green box. Below the tabs, there is a document icon and the text '2019 203565 000 00 PO Parking Operations - Parkin...'. To the right of this text are two buttons: 'Issued' (highlighted in a green box) and 'Children'.

THE PROCESS TAB

1. The Process tab shows mandatory and non-mandatory processes related to a permit folder. The number in parentheses on the Process tab shows how many open processes the folder contains in its current stage. From the folder, click the **Process tab**.

This screenshot is similar to the previous one, showing the same permit folder interface. In this view, the 'Process(4)' tab is highlighted in a green box, indicating that the user has selected the process tab. The 'Issued' and 'Children' buttons are still visible to the right of the document title.

- 2. AMANDA groups processes by category. A red asterisk indicates a mandatory review or inspection. The Assigned User column shows the name of the staff or group assigned to complete the process. Collapse All Sections collapses the categories, so that you can more easily scan them to find what you need. To open a process, **double-click its row**.

Process	Status	To Start	To End	Started	Ended	Assigned User	Reference	Comments	People Name
Application (3)									
2nd Screen App Set Up*	Approved			09/30/2019	09/30/2019	Palchey, Viktor			
P & Z - Property Check*	Approved			09/30/2019	09/30/2019	Palchey, Viktor			
Life Safety - Application Check*	Approved			09/30/2019	09/30/2019	Palchey, Viktor			
Issuance/Intake (1)									
Intake - DSC*	Intake			09/30/2019	09/30/2019	Palchey, Viktor			
Process Management (7)									
Assign Plan and File Location	Open	10/01/2019	10/14/2019			DOCUMENT SERVICES			
Assign Reviews - CO	Open	10/01/2019	10/14/2019			DOCUMENT SERVICES			
Corrections Received - CO	Closed			09/30/2019	09/30/2019	Palchey, Viktor			
Process Manager	Open	10/01/2019	10/14/2019			PROCESS MANAGEMENT			
Point of Contact	Open								

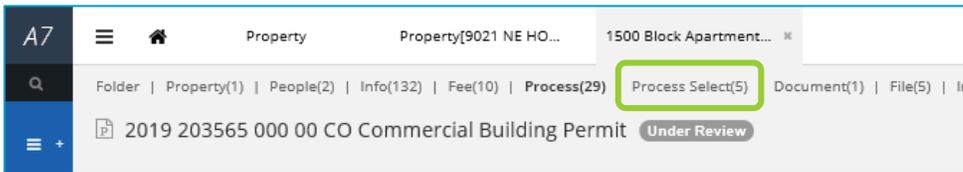
- 3. The process page shows the assigned user may be different from the sign-off user.

Planning and Zoning Review (5230) **Approved** 9021 NE HOYT ST, PORTLAND, Oregon, 97220, USA

Team	Assigned User	Baseline Start Date	Baseline End Date
Team	Smith, James	10/01/2019	10/14/2019
To Start	To End	Sign Off User	Discipline
Oct 01, 2019 00:00:00	Oct 14, 2019 00:00:00	Palchey, Viktor	Bureau of Planning

THE PROCESS SELECT TAB

1. The Process Select tab is useful for determining which processes are still outstanding. It shows mandatory processes related to a permit folder. The number in parentheses on the Process Select tab shows how many open processes the folder contains in its current stage. From the folder, click the **Process Select** tab.



2. The Process Select tab layout is similar to the Process tab layout. Process Select quickly shows the work that still needs to be done on a permit or case. If all mandatory processes have been approved, nothing will appear in the Process Select tab. The Status column shows the status of each mandatory review that is still outstanding. In this column, you can review all the processes that are open, corrections received, or in checksheet status.

