

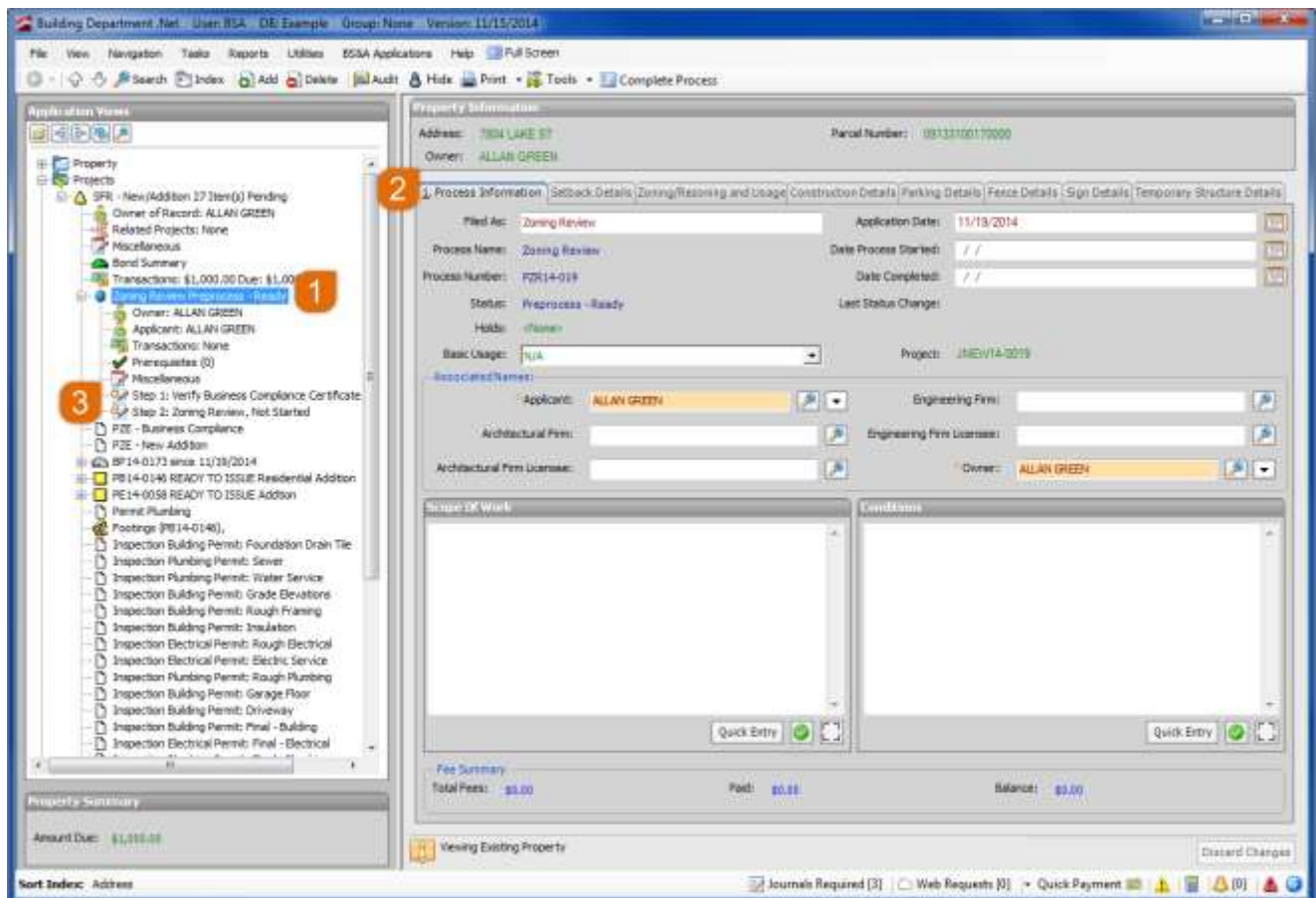
PZE Management

This topic is intended for users who have included a PZE (Planning, Zoning, and Engineering) process as a project requirement.

Hierarchy

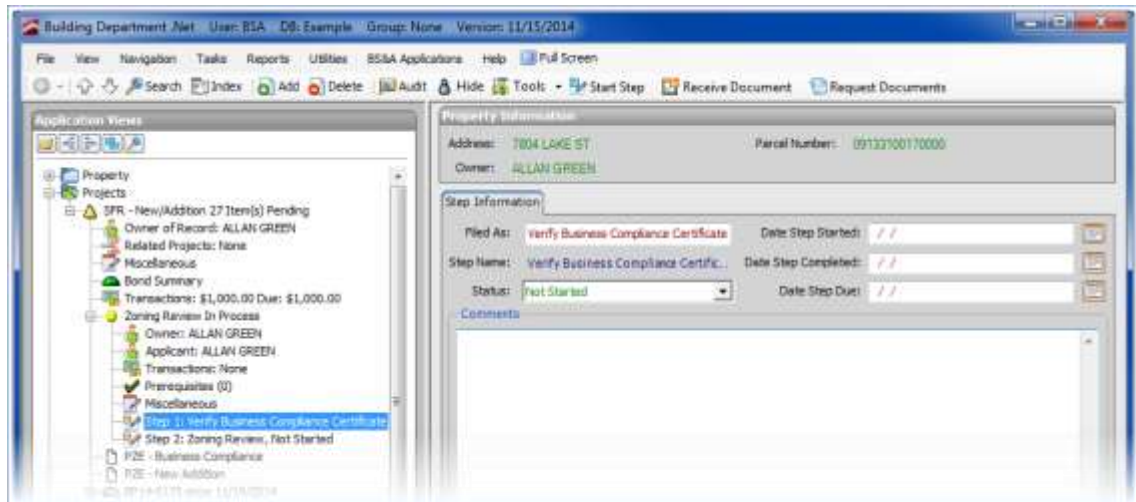
- Project
 - PZE Process(s)
 - Steps
 - Reviews
 - Comments/Concerns

When the PZE node is highlighted in Application Views **(1)**, the data entry screen to the right provides a wealth of fields, separated into tabs **(2)**, to help you track the entire process. Open the node in Application Views to see the relevant data attached to the PZE, including the Process Steps that were defined **(3)**.

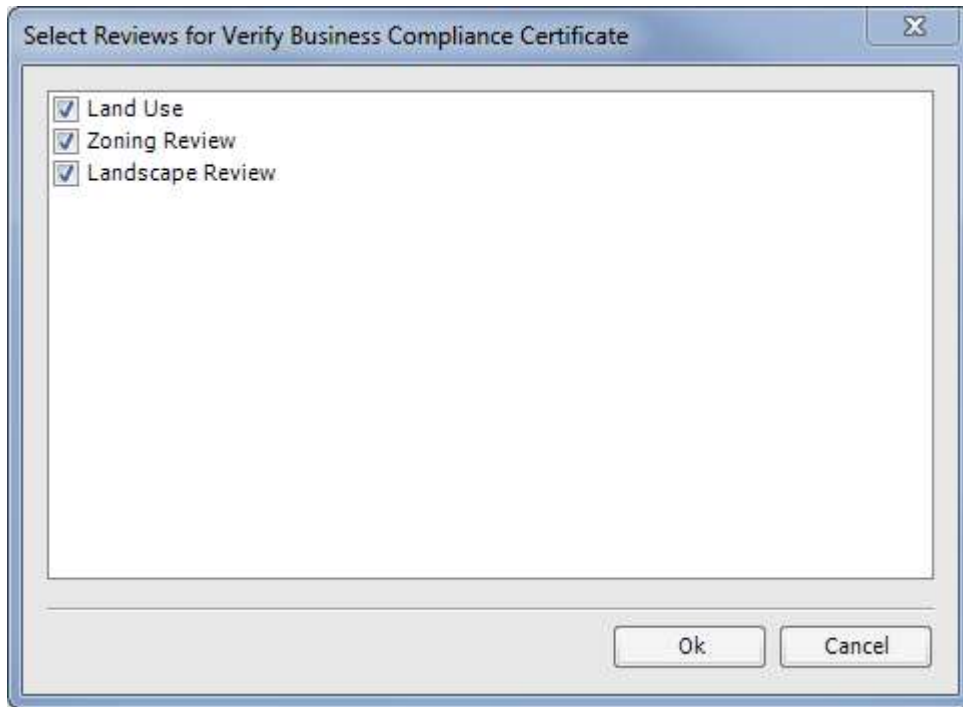


Start Step

1. Click the Process Step node.

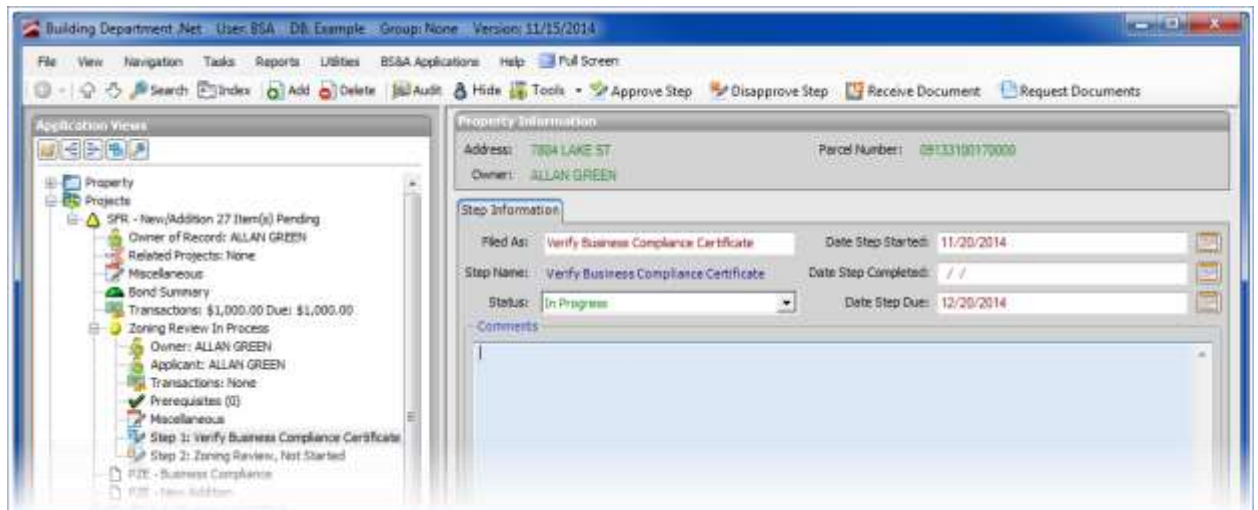


2. Click the Start Step button in the Tool Bar. You may be prompted to select one or more Reviews.

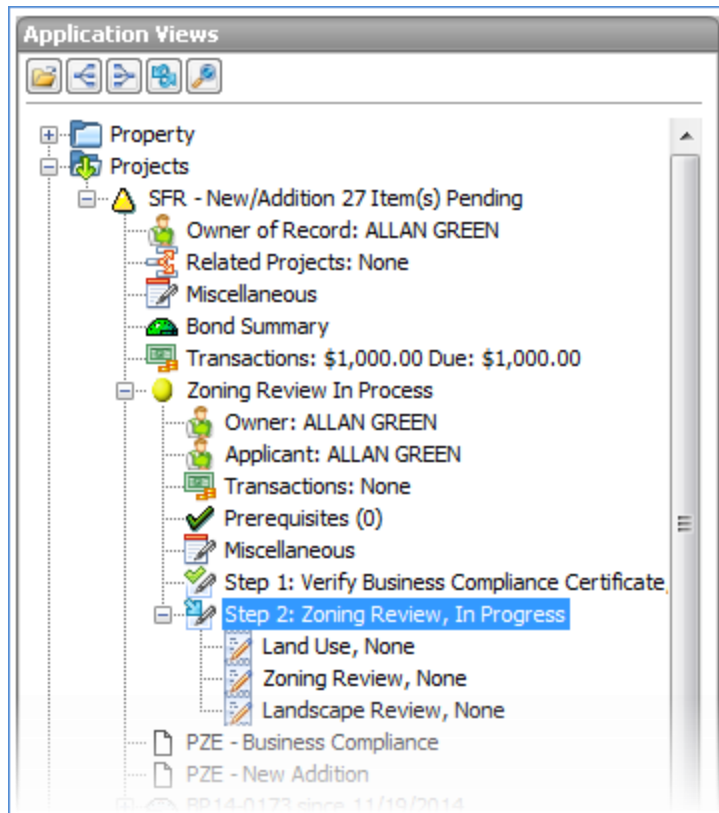


3. Check the appropriate boxes and click Ok.

The Status changes to In Progress and the Date Step Started field auto fills with your computer's system date. If you set up a due date in Program Setup, the Date Step Due field auto calculates and may be changed. Two new buttons have appeared in the Tool Bar: Approve Step and Disapprove Step.

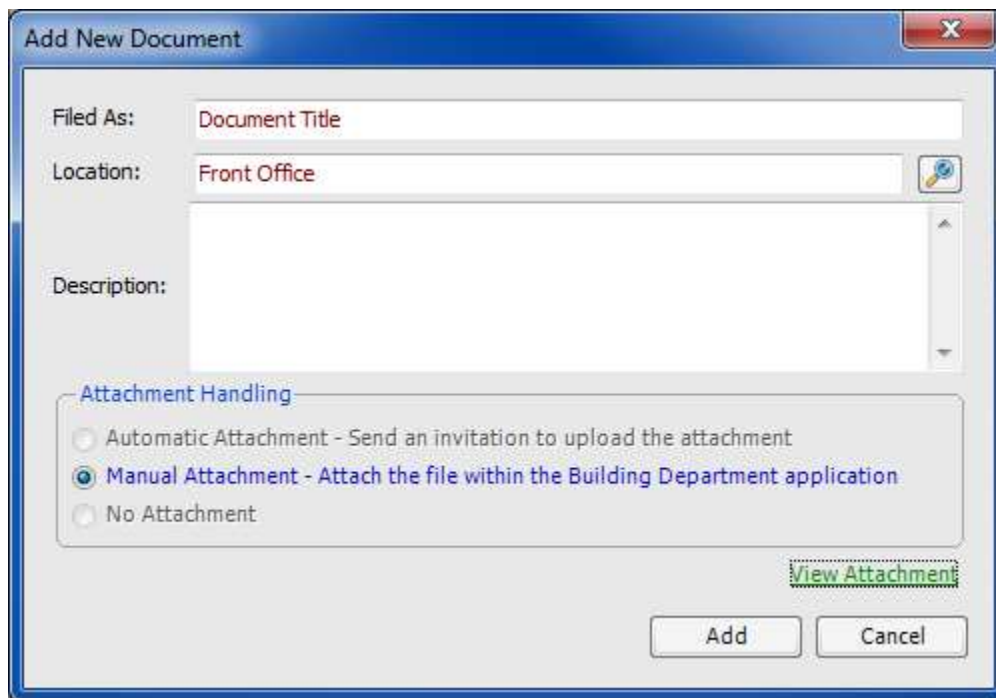


The example above did not include Reviews. Had Reviews been included, the Process Step node would open to reveal them. See Process Step Reviews, below, for instructions.



Add Document

1. Click the Process Step node, then click the Add Document button in the Tool Bar.
2. Enter the Filed As name, select the Location, and enter an optional Description.
3. Select the Attachment Option (the program defaults to the option you chose in Program Setup).
4. If you selected Manual Attachment, an Add Attachment command link appears. Click it to add the attachment. The command link changes to View Attachment.



The screenshot shows a dialog box titled "Add New Document" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Filed As:** A text input field containing "Document Title".
- Location:** A dropdown menu showing "Front Office" with a search icon to its right.
- Description:** A large, empty text area.
- Attachment Handling:** A section with three radio button options:
 - Automatic Attachment - Send an invitation to upload the attachment
 - Manual Attachment - Attach the file within the Building Department application
 - No Attachment

At the bottom right of the dialog, there is a green, dotted "View Attachment" link, and two buttons labeled "Add" and "Cancel".

5. Click Add. The Comments area is moved down to accommodate a list of documents that will be attached to the current step.

The screenshot displays a software interface with two main sections: "Step Information" and "Documents".

Step Information:

- Filed As: Verify Business Compliance Certificate
- Date Step Started: 11/20/2014
- Step Name: Verify Business Compliance Certificate
- Date Step Completed: / /
- Status: In Progress (dropdown menu)
- Date Step Due: 12/20/2014

Documents:

Go	Filed As	Status	Date Received	Date Completed	Attachment Handling	View Attachme
	Document Title	Not Started	11/20/2014		Manual Attachment	View Attachme

Comments:

The Comments section is currently empty and located below the Documents table.

Request Documents

1. Click the Process Step node.
2. Click the Request Documents button in the Tool Bar and check the boxes of the Recipients (see Send Email if you are unfamiliar with this email dialogue). Verify or edit the Subject and Message, and add any necessary attachments. Click Ok.

Approve Step

1. Click the Process Step node, then click the Approve Step button in the Tool Bar. You may be prompted to start the next step; for the purpose of these instructions, click No. The Status changes to Approved, and the Date Step Completed field auto fills with your computer's system date.

The screenshot shows a 'Step Information' window with the following details:

- Filed As: Verify Business Compliance Certificate
- Date Step Started: 11/20/2014
- Step Name: Verify Business Compliance Certificate
- Date Step Completed: 11/20/2014
- Status: Approved
- Date Step Due: 12/20/2014

Below the information is a 'Documents' table:

Go	Filed As	Status	Date Received	Date Completed	Attachment Handling	
	Document Title	Not Started	11/20/2014	11/20/2014	Manual Attachment	View Attachment

Disapprove Step

1. Click the Process Step node, then click the Disapprove Step button in the Tool Bar.
2. Check the box(es) of the Documents to Resubmit and click Ok. The Status changes back to Not Started, and two new nodes have appeared to help you track this Process Step: Process Step History and Revision 1: Disapproved.

The screenshot shows the 'Building Department .Net' application interface. The 'Step Information' window is open, showing the following details:

- Filed As: Verify Business Compliance Certificate
- Date Step Started: //
- Step Name: Verify Business Compliance Certificate
- Date Step Completed: //
- Status: Not Started
- Date Step Due: //

Below the information is a 'Documents' table:

Filed As	Status	Date Received	Date Completed	Attachment Handling	
Document Title	Not Started	11/20/2014		Manual Attachment	<input type="checkbox"/> Add Attachment

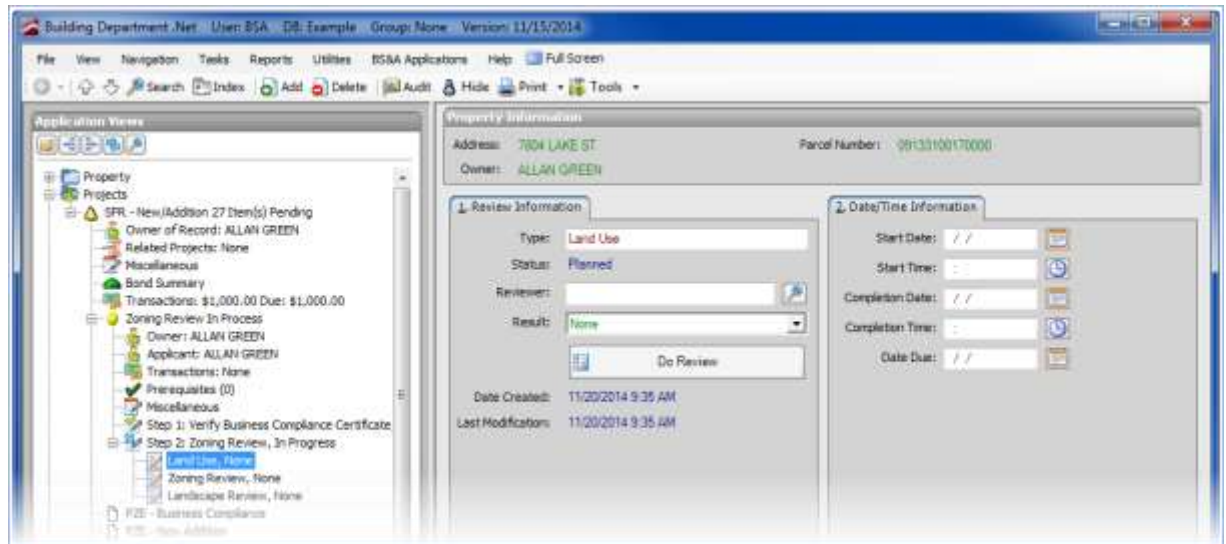
The application also shows a tree view on the left with the following nodes:

- Property
- Projects
 - SFR - New(Addition 27 Item(s) Pending
 - Owner of Record: ALLAN GREEN
 - Related Projects: None
 - Miscellaneous
 - Bond Summary
 - Transactions: \$1,000.00 Due: \$1,000.00
 - Zoning Review In Process
 - Owner: ALLAN GREEN
 - Applicant: ALLAN GREEN
 - Transactions: None
 - Prerequisites (0)
 - Miscellaneous
 - Step 1: Verify Business Compliance Certificate
 - Process Step History
 - Revision 1: Disapproved
 - Step 2: Zoning Review, Not Started

Process Step Reviews

Process Step Reviews are basically inspections.

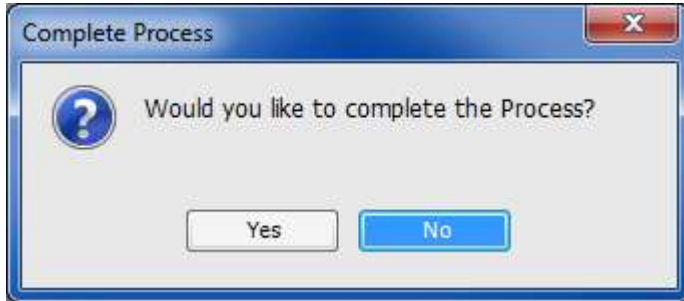
1. Click the Process Step Review node.



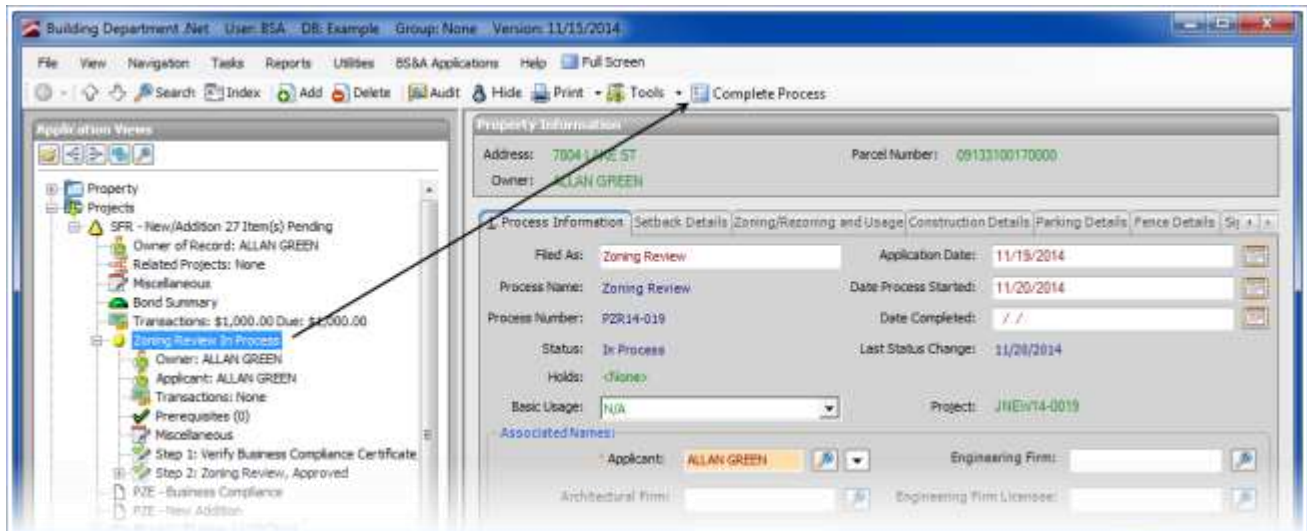
2. Fill out fields as necessary or click the Do Review button to utilize more information (similar to the Do Inspections screen).

Complete Process

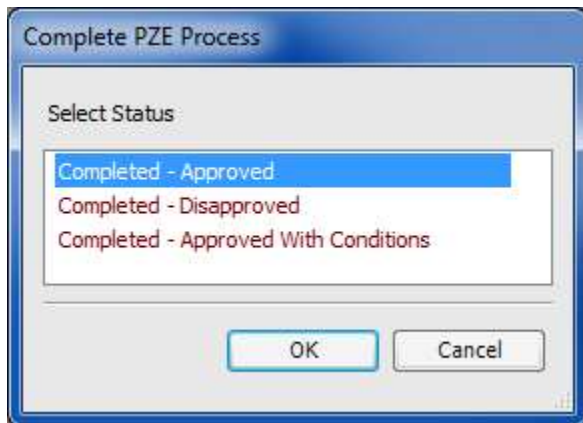
If the Process Step includes Reviews, and the final Review has been approved, you will be prompted to complete the Process Step:



Otherwise, click the Process Step node, then click Complete Process in the Tool Bar:



Select the appropriate Status:



- Completed - Approved. The PZE requirement is considered fulfilled, and the project's Item(s) Pending count is reduced by one.
- Completed - Disapproved. The PZE requirement is considered fulfilled, and the project's Item(s) Pending count is reduced by one. You have the option of restarting the requirement.
- Completed - Approved with Conditions. The PZE requirement is not fulfilled, indicating further input is required.