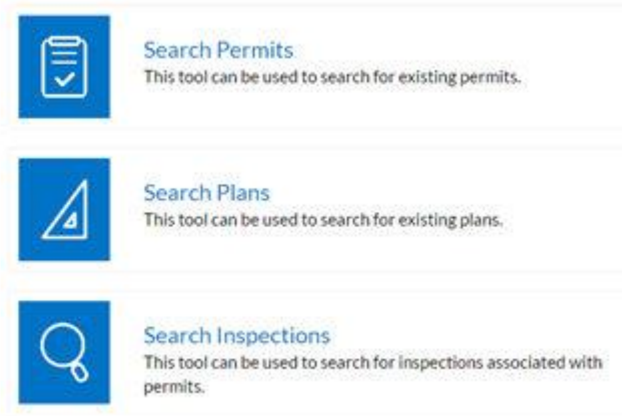
Home

The Home page allows users to access public information without logging in. Users can still access the GIS Map, Global Search, User Registration, Today's Inspections, and Global Notifications.

Citizens can click the Search Permits, Search Plans, and Search Inspections links to access information.



Register

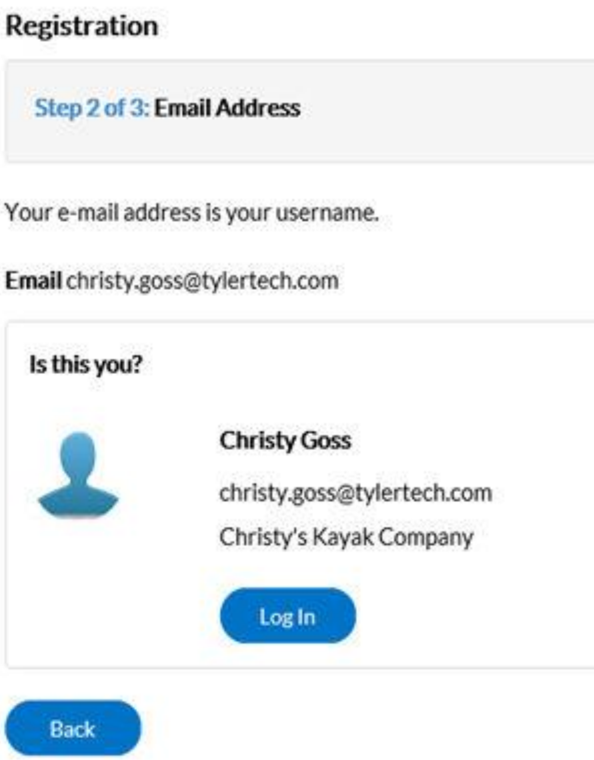
1. Navigate to the URL designated for the Citizen Self Service environment.

2. Click Sign Up.

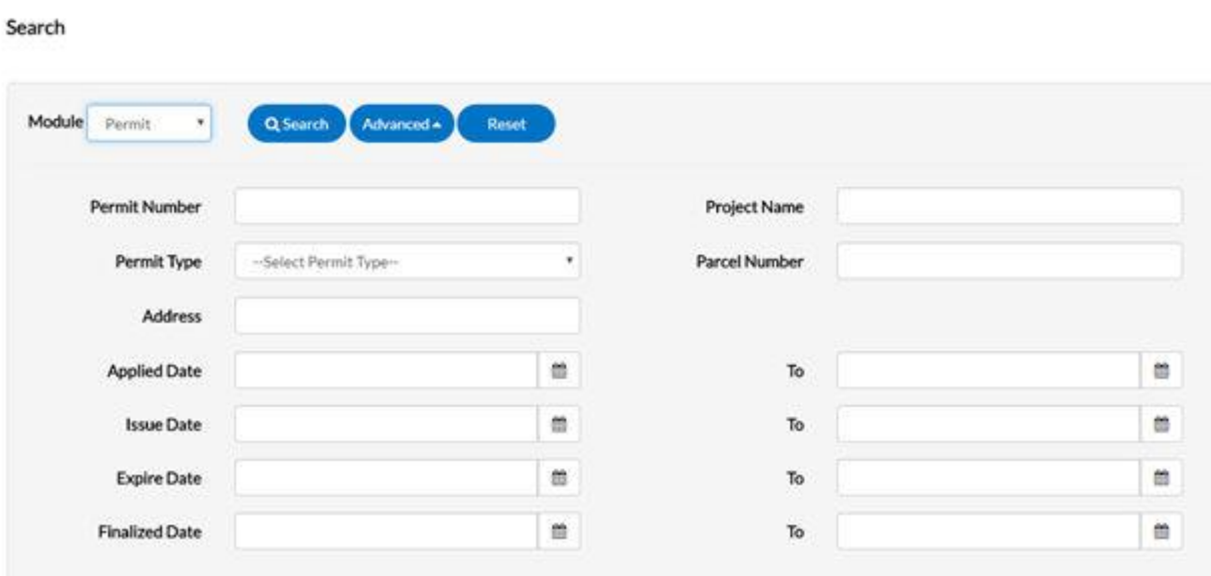
3. Enter an email address. The system sends a confirmation email.

4. Click Confirm in the email to return to the site. A confirmation of an existing contact in the system displays.

5. Click Log In.



Search Permits



Users do not have to utilize all fields.

1. Type at least part of the permit number to search for in the Permit Number field.

2. Type at least part of the name of the project associated to the permit to search for in the Project Name field.

3. Select the type of permit to search for from the Permit Type dropdown.

4. Type at least part of the number of the parcel associated to the permit to search for in the Parcel Number field.

5. Type at least part of the address associated to the permit to search for in the Address field.

6. Type a range of permit application dates to search for permits within in the Applied Date and To fields, or click the calendar icons to select the dates.

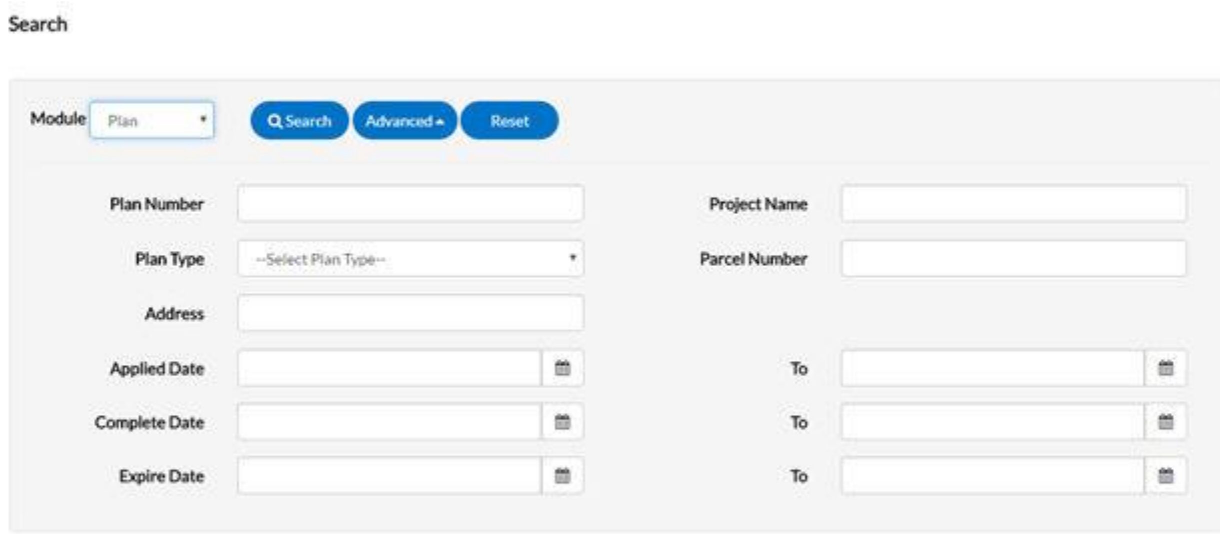
7. Type a range of permit issue dates to search for permits within in the Issue Date and To fields, or click the calendar icons to select the dates.

8. Type a range of permit expiration dates to search for permits within in the Expire Date and To fields, or click the calendar icons to select the dates.

9. Type a range of permit finalization dates to search for permits within in the Finalized Date and To fields, or click the calendar icons to select the dates.

10. Click Search to display a list of results that meet the search criteria. Click Reset to clear the entered search criteria. Click Advanced to hide the search criteria.

Search Plans



Users do not have to utilize all fields.

1. Type at least part of the plan number to search for in the Plan Number field.

2. Type at least part of the name of the project associated to the plan to search for in the Project Name field.

3. Select the type of plan to search for from the Plan Type dropdown.

4. Type at least part of the number of the parcel associated to the plan to search for in the Parcel Number field.

5. Type at least part of the address associated to the plan to search for in the Address field.

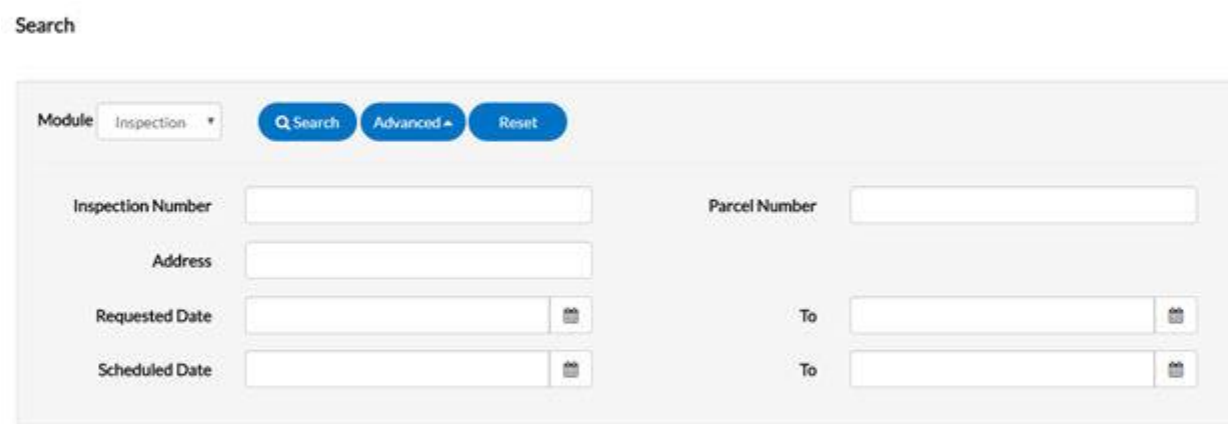
6. Type a range of plan application dates to search for plans within in the Applied Date and To fields, or click the calendar icons to select the dates.

7. Type a range of plan completion dates to search for plans within in the Complete Date and To fields, or click the calendar icons to select the dates.

8. Type a range of plan expiration dates to search for plans within in the Expire Date and To fields, or click the calendar icons to select the dates.

9. Click Search to display a list of results that meet the search criteria. Click Reset to clear the entered search criteria. Click Advanced to hide the search criteria.

Search Inspections



Users do not have to utilize all fields.

1. Type at least part of the inspection number to search for in the Inspection Number field.

2. Type at least part of the number of the parcel associated to the inspection to search for in the Parcel Number field.

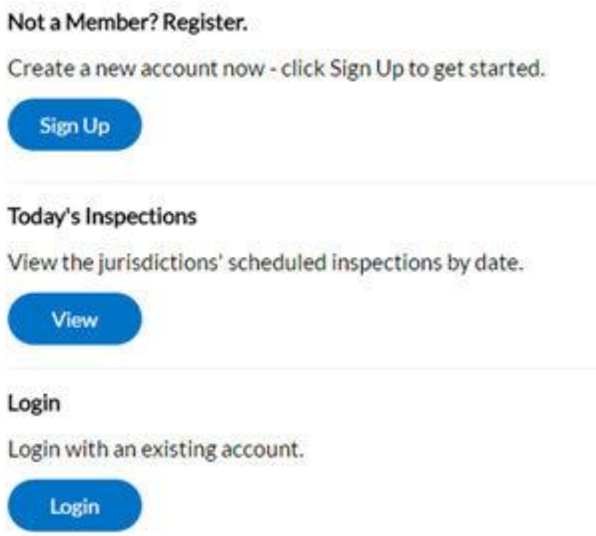
3. Type at least part of the address associated to the inspection to search for in the Address field.

4. Type a range of inspection request dates to search for inspections within in the Requested Date and To fields, or click the calendar icons to select the dates.

5. Type a range of inspection schedule dates to search for inspections within in the Scheduled Date and To fields, or click the calendar icons to select the dates.

6. Click Search to display a list of results that meet the search criteria. Click Reset to clear the entered search criteria. Click Advanced to hide the search criteria.

Log In



Once you've registered, follow the steps below to log into Olathe's new Permitting and Planning portal each time you visit the site:

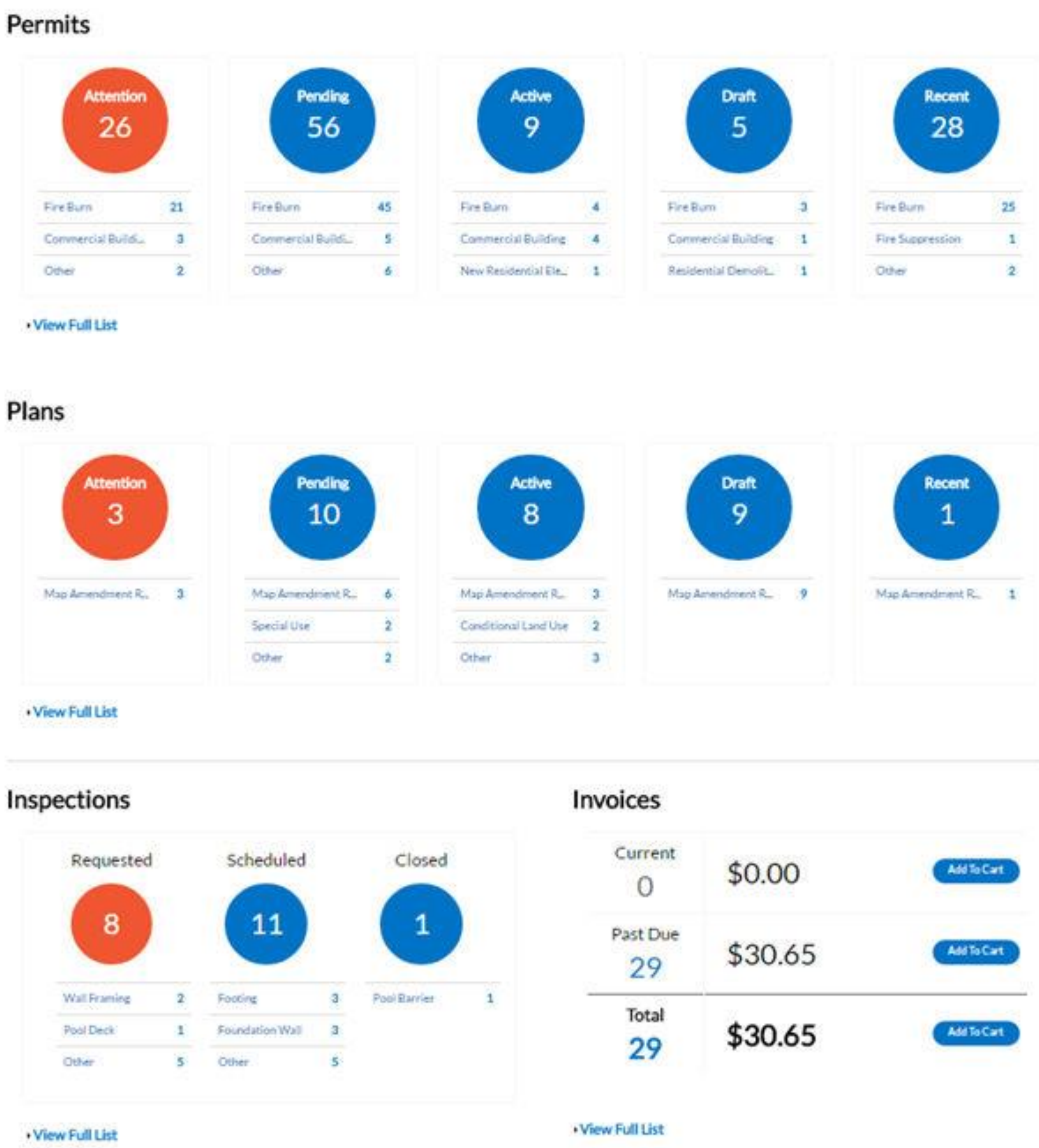
1. Navigate to **energov.olatheks.org**

2. Enter your **Email Address** and **Password** in the fields provided.

3. Mark the **Remember me** checkbox to have the system remember your credentials.

4. Click **Log In**. The page validates your login and, if it is valid, opens with the functions you are authorized to access.

Dashboard



The site allows users to see a visual representation of aggregated data on the dashboard. Users can see data for permits, plans, inspections, and invoices. Users can click the Draft circles to access saved drafts and also add unpaid invoices directly to the shopping cart. The dashboard displays data that is contextual to the logged in user.

1. Click **Draft** in the **Permits** or **Plans** section to view saved Permit or Plan application drafts.

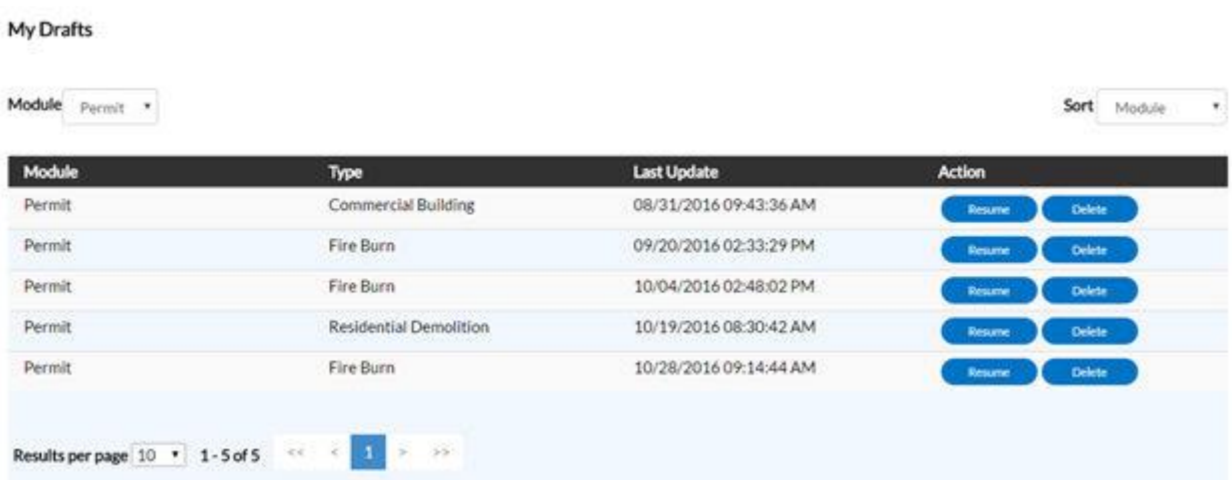
2. Click the appropriate status circle in the **Permits** section to view a list of the corresponding Permits. Beneath each status circle is a breakdown of the Permit Types. Click **View Full List** to view all Permits.

3. Click the appropriate status circle in the **Plans** section to view a list of the corresponding Plans. Beneath each status circle is a breakdown of the Plan Types. Click **View Full List** to view all Plans.

4. Click the appropriate status circle in the **Inspections** section to view a list of the corresponding Inspections. Beneath each status circle is a breakdown of the Inspection Types. Click **View Full List** to view all Inspections.

5. Click **Add to Cart** next to **Current**, **Past Due**, or **Total** in the Invoices section to add the corresponding Invoices to the Shopping Cart. Click **View Full List** to view all Invoices.

Permits

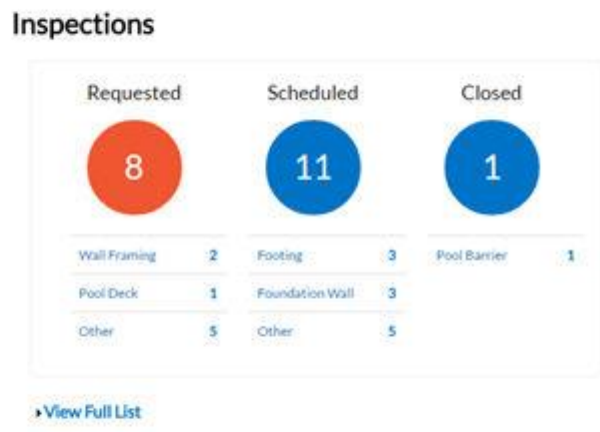
<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>Attention</td><td>Clicking the Attention status circle on the Dashboard displays a list of all permit numbers applied for that have a status of Attention. The list shows the project name, address attached to the permit, type, status, and the reason that the permit needs the citizen’s attention.</td></tr>
<tr><td>Pending</td><td>Clicking the Pending status circle on the Dashboard displays a list of all permit numbers applied for that have a status of Pending. The list shows the project name, address attached to the permit, type, status, and reason.</td></tr>
<tr><td>Active</td><td>Clicking the Active status circle on the Dashboard displays a list of all permit numbers applied for that have a status of Active. The list shows the project name, address attached to the permit, type, status, and reason.</td></tr>
<tr><td>Draft</td><td>Clicking the Draft status circle on the Dashboard displays a list of all saved but not yet submitted permit and plan applications. These drafts can be incomplete and action may resume at any point in time. Users can also delete them from this window if they are now unnecessary.

My Drafts
Module Permit Sort Module
<table>
<tr><th>Module</th><th>Type</th><th>Last Update</th><th>Action</th></tr>
<tr><td>Permit</td><td>Commercial Building</td><td>08/31/2016 09:43:36 AM</td><td>Resume Delete</td></tr>
<tr><td>Permit</td><td>Fire Burn</td><td>09/20/2016 02:33:29 PM</td><td>Resume Delete</td></tr>
<tr><td>Permit</td><td>Fire Burn</td><td>10/04/2016 02:48:02 PM</td><td>Resume Delete</td></tr>
<tr><td>Permit</td><td>Residential Demolition</td><td>10/19/2016 08:30:42 AM</td><td>Resume Delete</td></tr>
<tr><td>Permit</td><td>Fire Burn</td><td>10/28/2016 09:14:44 AM</td><td>Resume Delete</td></tr>
</table>
Results per page 10 1 - 5 of 5 << < 1 > >></td></tr>
<tr><td>Recent</td><td>Clicking the Recent status circle on the Dashboard displays a list of all permit numbers applied for that have a status of Recent. The list shows the project name, address attached to the permit, type, status, and reason.</td></tr>
</table>

Field Name	Description
Display	This dropdown allows the citizen to organize and select a status to view.
Sort	This dropdown allows the citizen to sort by Permit Number, Project or Address.
Search	This allows the citizen to search by permit number, project name, or address by typing in the information and clicking the lookup icon.

Plans

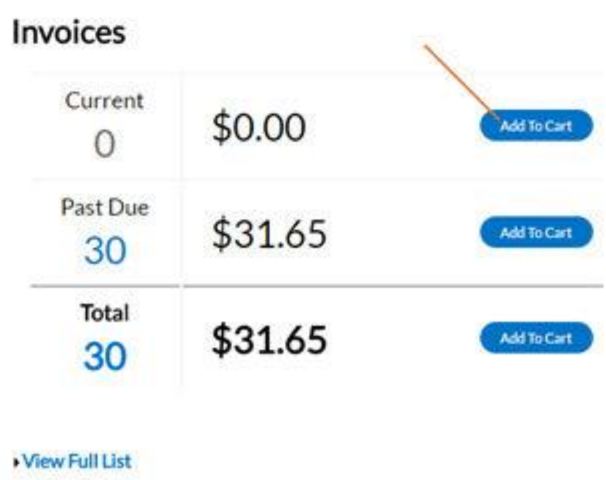
Field Name	Description
Attention	Clicking the Attention status circle on the Dashboard displays a list of all plan numbers applied for that have a status of Attention. This list shows the project name, address attached to the plan, type, status, and the reason that the plan needs the citizen's attention.
Pending	Clicking the Pending status circle on the Dashboard displays a list of all plan numbers applied for that have a status of Pending. The list shows the project name, address attached to the plan, type, status, and reason.
Approved	Clicking the Approved status circle on the Dashboard displays a list of all plan numbers applied for that have a status of Approved. The list shows the project name, address attached to the plan, type, status, and reason.
Denied	Clicking the Denied status circle on the Dashboard displays a list of all plan numbers applied for that have a status of Denied. This list shows the project name, address attached to the plan, type, status, and reason.
Draft	Clicking the Draft status circle on the Dashboard displays a list of all saved but not submitted permit and plan applications. These drafts may be incomplete and action may resume at any point in time. Users can also delete them from this window if they are now unnecessary.
Recent	Clicking the Recent status circle on the Dashboard displays a list of all plan numbers applied for that have a status of Recent. The list shows the project name, address attached to the plan, type, status, and reason.

Inspections



Field Name	Description
Requested	Clicking the Requested status circle on the Dashboard displays a list of all inspection case numbers that have a status of Requested. The list shows the address attached to the inspection, inspection type, and requested date.
Scheduled	Clicking the Scheduled status circle on the Dashboard displays a list of all inspection case numbers that have a status of Scheduled. The list shows the address attached to the inspection, inspection type, requested date, and scheduled date.
Closed	Clicking the Closed status circle on the Dashboard displays a list of all inspection case numbers that have a status of Closed. The list shows the address attached to the inspection, inspection type, requested date, and scheduled date.

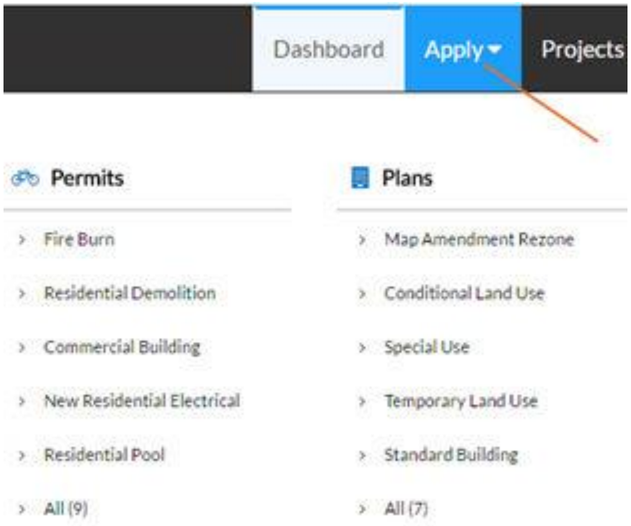
Invoices



Users can access paid, voided, and unpaid invoices. Invoices are accessible from the Dashboard and the menu system and users can add them to the electronic shopping cart. The site's integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.

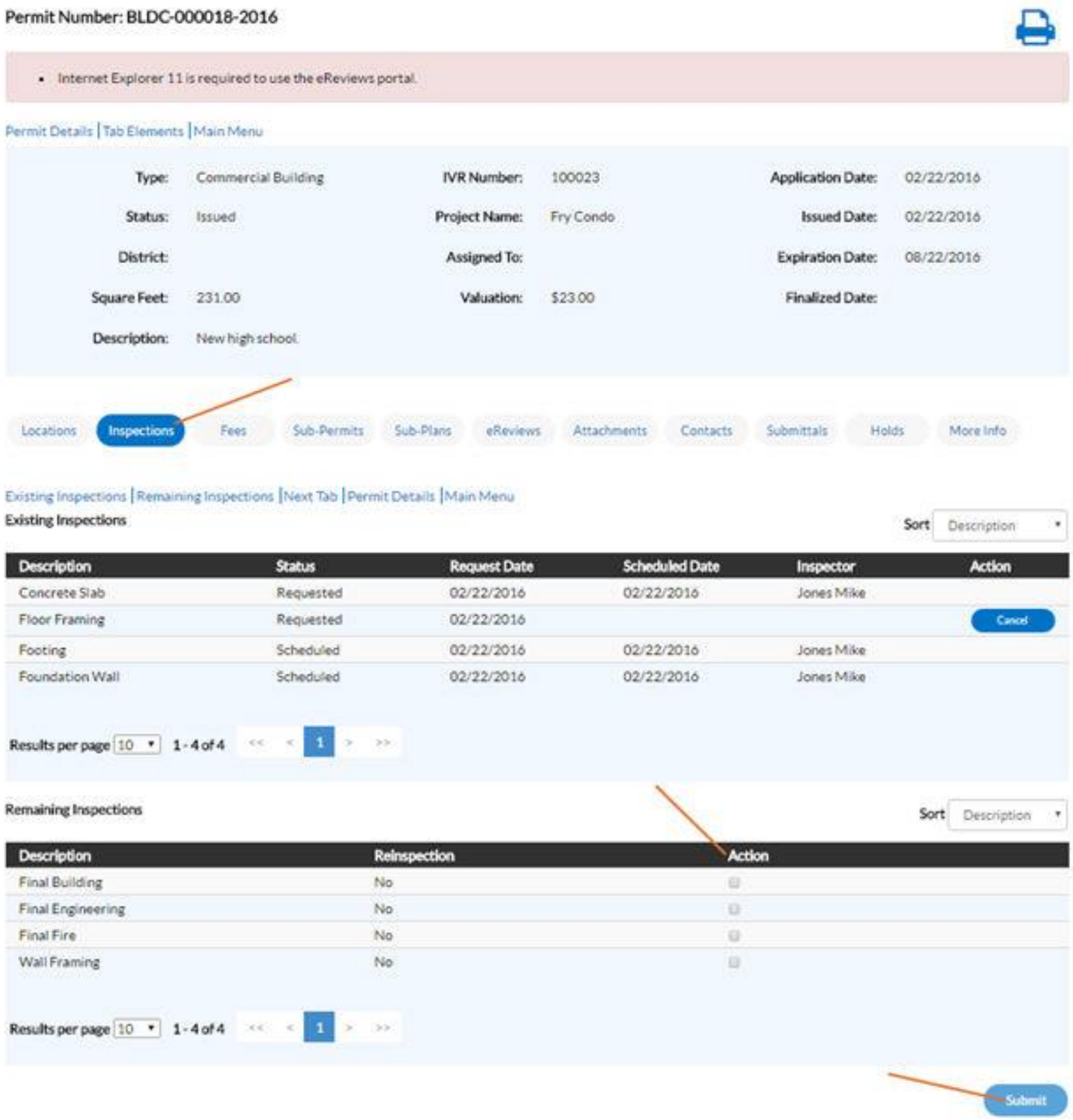
Field Name	Description
Current	Clicking Add To Cart beside Current invoices allows citizens to access the Shopping Cart window where all current invoices display. The citizen can access an invoice by clicking on the invoice number or they can access the case by clicking on the case number. To remove an Invoice from the shopping cart, the citizen can click Remove. To check out, the citizen can click Check Out. This takes them to a payment window to complete the payment for the invoice(s).
Past Due	Clicking Add To Cart beside Past Due invoices allows the citizen to access the Shopping Cart window where all past due invoices display. The citizen can access the invoice by clicking on the invoice number or they can access the case by clicking on the case number. To remove an invoice from the shopping cart, the citizen can click Remove. To check out, the citizen can click Check Out. This takes them to a payment window to complete the payment for the invoice(s).
Total	Clicking Add To Cart beside Total invoices allows the citizen to access the Shopping Cart window where all invoices display. The citizen can access the invoice by clicking on the invoice number or they can access the case by clicking on the case number. To remove an invoice from the shopping cart, the citizen can click Remove. To check out, the citizen can click Check Out. This takes them to a payment window to complete the payment for the invoice(s).

Applying for Permit/Plans



Users have 2 options under the Apply menu: Permits or Plans. Administrators configure the top 5 permit types and plan types on the website, and those types display in the order in which the jurisdiction decides to display them. If the user does not see the permit or plan they want to apply for, they can click All at the bottom of the list to access the Permit Application Assistant. This tool helps guide the user into choosing the correct permit type to apply for. Users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.

Request Inspections on Issued Permits

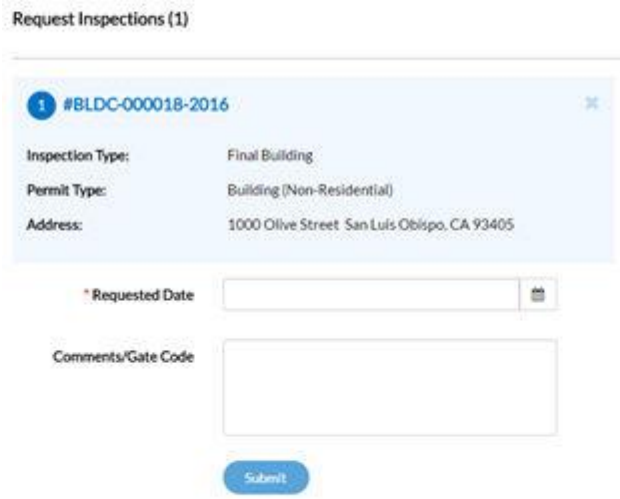


1. Click the number of the permit to request an inspection. The permit case opens.

2. Choose the Inspections tab. A list of Remaining Inspections displays at the bottom.

3. Mark the **Action** checkbox of the Inspection to request (The system disables the Action checkbox for unpaid fees.).

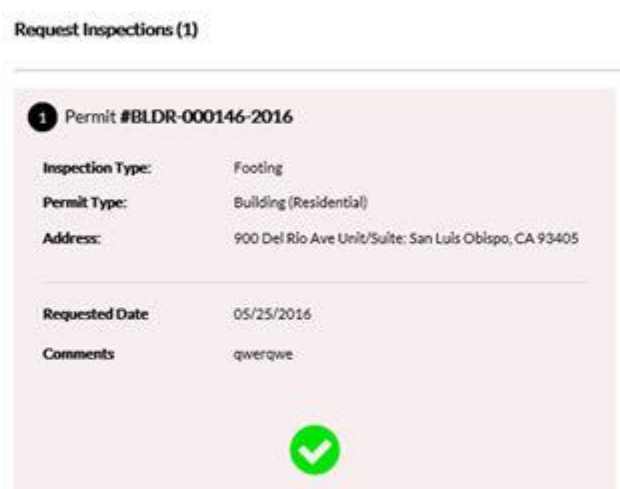
4. Click **Submit**. The Request Inspections window opens.



5. Select a requested date for the inspection by clicking the calendar icon beside the **Requested Date** field.

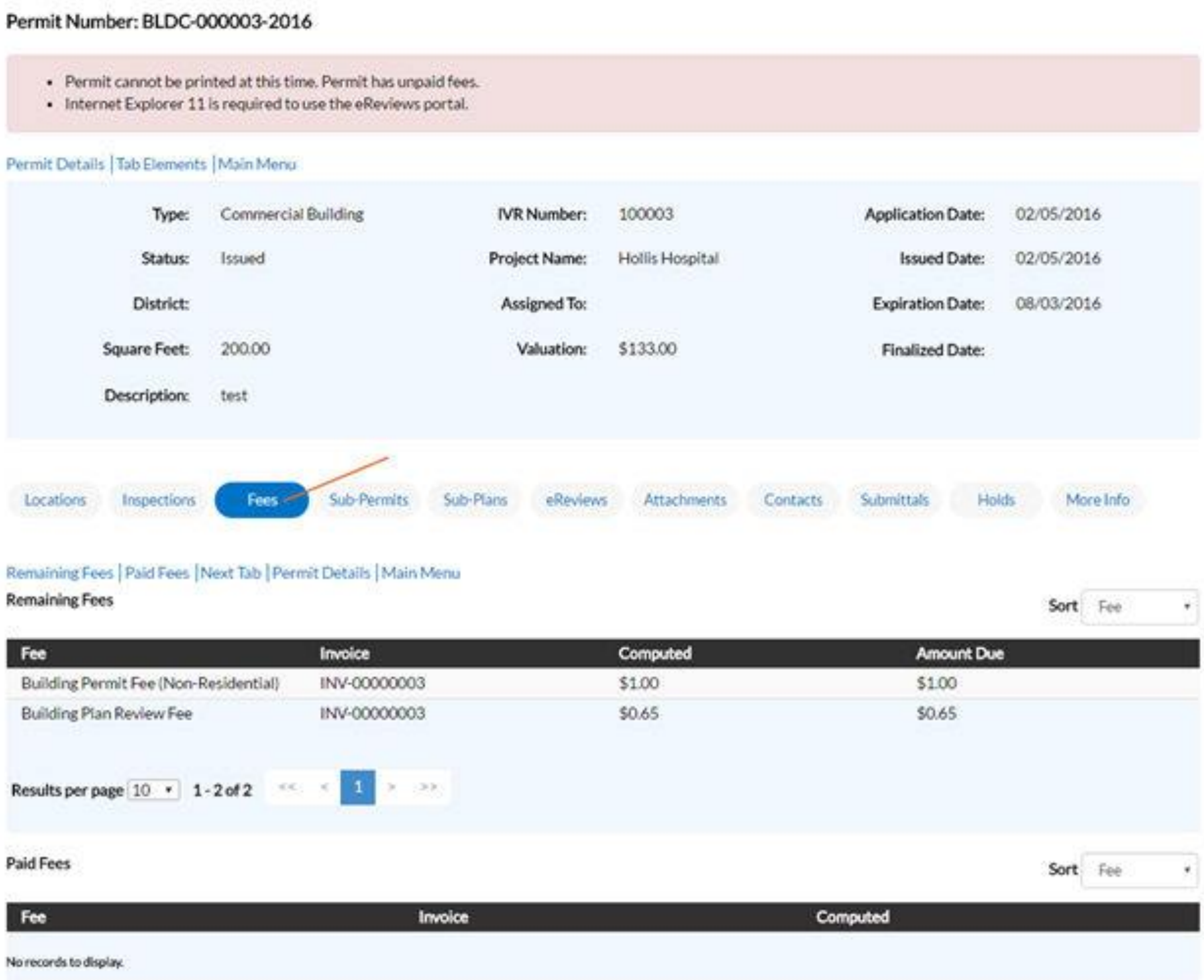
6. Fill in comments about the requested inspection in the **Comments/Gate Code** field.

7. Click **Submit**. The inspection information and a green check mark display if the request is successful.



8. Navigate back to the Permit Details window. The inspection now displays under Existing Inspections in the full list of inspections.

Pay Fees

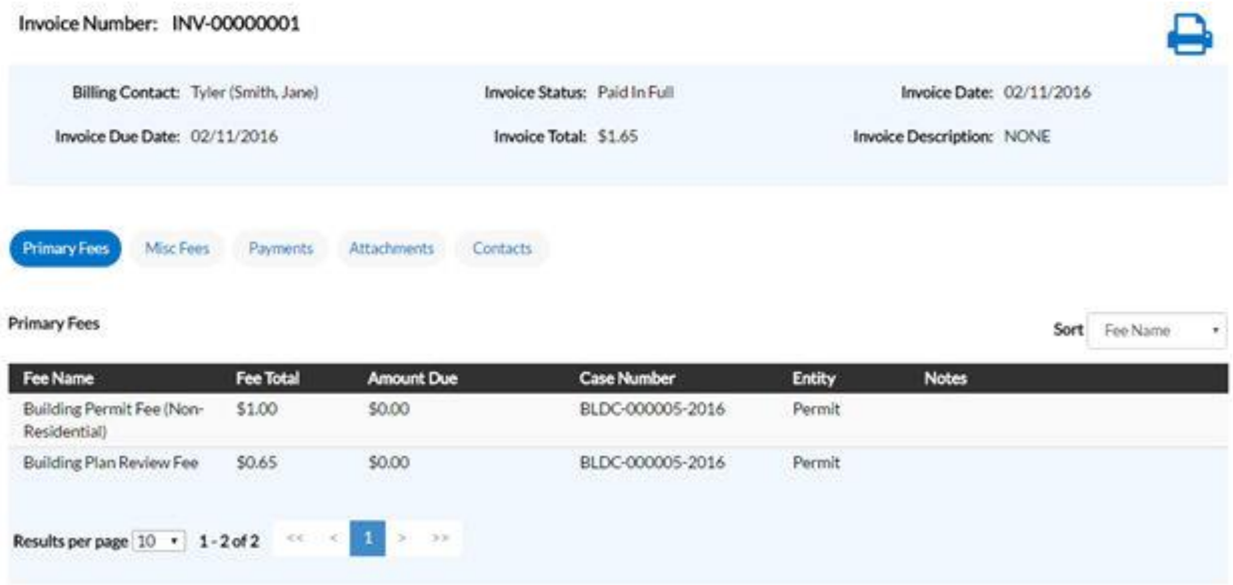


To pay fees on a plan/permit, the citizen needs the case manager to invoice the fees in EnerGov.

1. Navigate into a plan/permit.
2. Choose the Fees tab. The citizen can see a list of Remaining Fees and Paid Fees with invoice numbers next to the fee names.
3. Click Dashboard on the menu.
4. Scroll down to Invoices.

Invoices

Users can access paid, voided, and unpaid invoices. Invoices are accessible from the dashboard and the menu system and users can add them to the electronic shopping cart.



Follow the steps below to view invoice information:

1. Click the printer icon to print or save the invoice as PDFs.

2. Choose the Primary Fees tab to view the **Fee Name**, **Fee Total**, **Amount Due**, **Case Number**, **Entity**, and **Notes** for all fees associated with the invoice. Select the column to sort the fees by from the **Sort** dropdown.

3. Choose the Misc Fees tab to view the **Fee Name**, **Fee Total**, **Paid Amount**, and **Amount Due** for all miscellaneous fees associated with the invoice. Select the column to sort the fees by from the **Sort** dropdown.

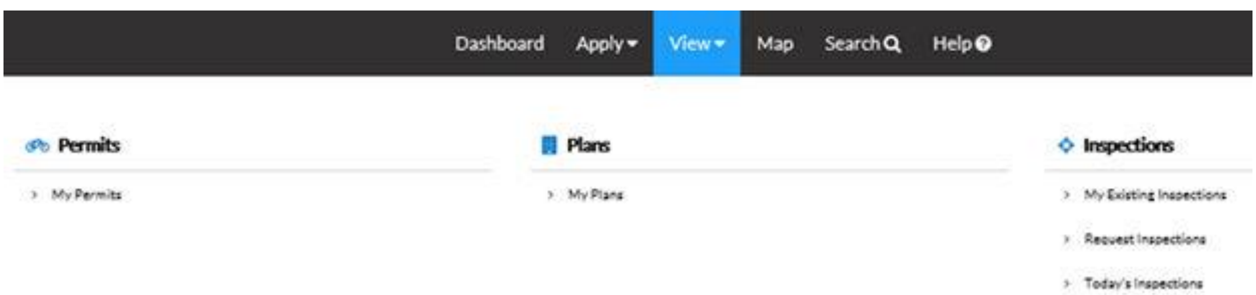
4. Choose the Payments tab to view the **Receipt Number**, **Status**, **Transaction Type**, **Payment Type**, **Payment Amount**, and **Payment Date** for all payments associated with the invoice. Select the column to sort the payments by from the **Sort** dropdown.

5. Choose the Attachments tab to view the **File Name** and **Added Date** for all files attached to the invoice. Select the column to sort the attachments by from the **Sort** dropdown.

6. Choose the Contacts tab to view the **Company**, **First Name**, **Last Name**, **Title**, and **Email** for all contacts associated with the invoice. Select the column to sort the contacts by from the **Sort** dropdown.

7. Click **Add to Cart** to add the invoice to the shopping cart.

View



Use the View menu to access permits, plans, and inspections.

My Permits

Not all permit data is available to all users.

1. Type a specific permit number, project, or address to search for in the search field, and click the lookup icon to locate permits that meet the search criteria.

2. Select the statuses of the permits to display in the list from the **Display** dropdown.

3. Select the feature to sort the permits in the list by from the **Sort** dropdown.

4. Click a permit number to open the associated permit record.

5. Select the number of permits to display on each page from the **Results per page** dropdown.

6. Use the page navigation buttons to move between pages of permits.

My Plans

Not all plan data is available to all users.

1. Type a specific plan number, project, or address to search for in the search field, and click the lookup icon to locate plans that meet the search criteria.

2. Select the statuses of the plans to display in the list from the **Display** dropdown.

3. Select the feature to sort the plans in the list by from the **Sort** dropdown.

4. Click a plan number to open the associated plan record.

5. Select the number of plans to display on each page from the **Results per page** dropdown.

6. Use the page navigation buttons to move between pages of plans.

Inspections

My Inspections

1. Type a specific case number, address, or inspection type to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.

2. Select the statuses of the inspections to display in the list from the **Display** dropdown.

3. Select the feature to sort the inspections in the list by from the **Sort** dropdown.

4. Click a case number to open the associated record if desired.
5. Select the number of inspections to display on each page from the **Results per page** dropdown.
6. Use the page navigation buttons to move between pages of inspections.

Request Inspections

The new site provides a great way for users to request inspections. Users must login to request inspections, **and they must be contacts associated with the cases**. Users can request multiple related/unrelated inspections simultaneously. Inspection requests interact with the inspection-related data on the dashboard.

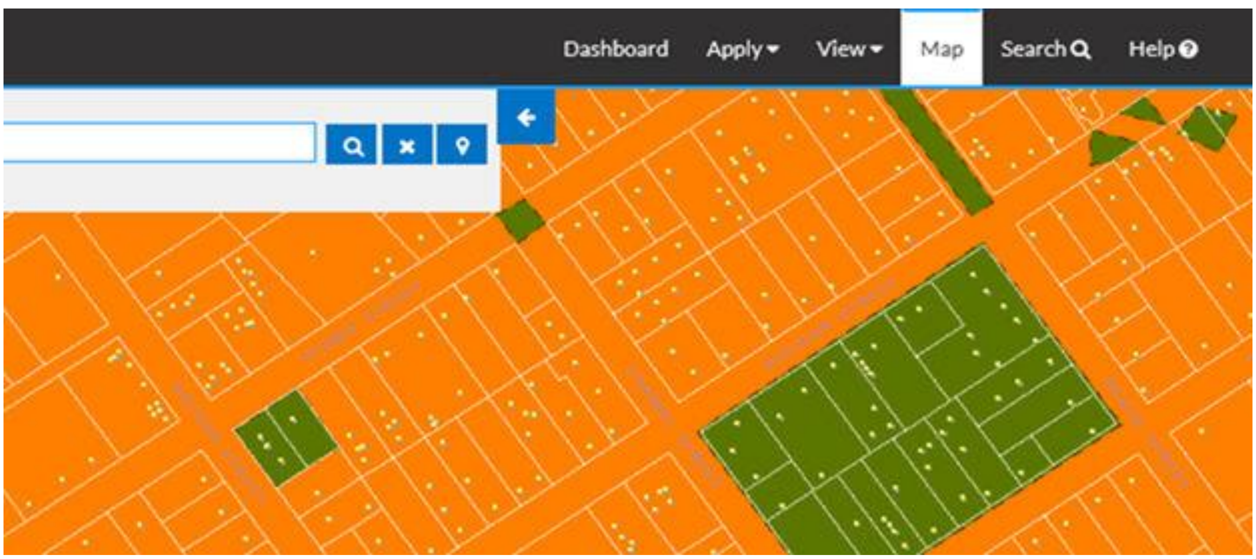
1. Type a specific permit number, address, or inspection type to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
2. Select the feature to sort the inspections in the list by from the **Sort** dropdown.
3. Click a permit number to open the associated permit record. Or, mark the checkboxes next to permits to request inspections for, and click **Request Inspection** to open the Request Inspections window.
4. Select the number of inspections to display on each page from the **Results per page** dropdown.
5. Use the page navigation buttons to move between pages of inspections.

Today's Inspections

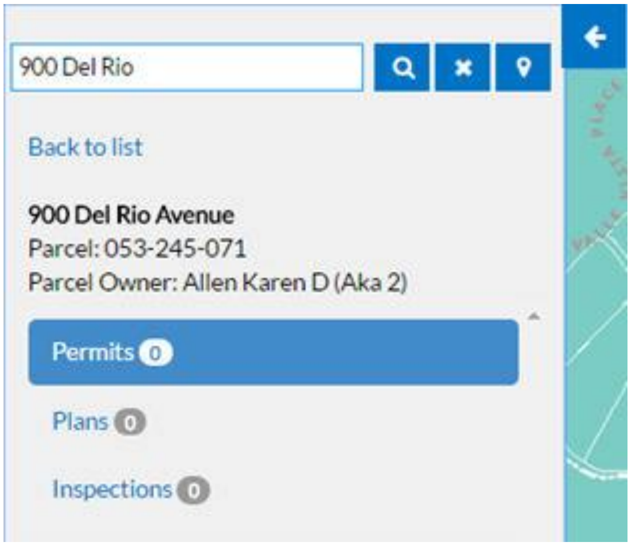
Use this window to view, sort, and access all inspections scheduled for a specific day.

1. Type a specific case number, inspection type, or address to search for in the search field, and click the lookup icon to locate inspections that meet the search criteria.
2. Type the date to view due inspections for in the **Date** field, or click the calendar icon to select the date.
3. Mark the **Exclude Completed** checkbox to exclude completed inspections from the list of results.
4. Select the feature to sort the inspections in the list by from the **Sort** dropdown.
5. Select the number of inspections to display on each page from the **Results per page** dropdown.
6. Use the page navigation buttons to move between pages of inspections.

Map



Filter options are different for logged in users than logged out users.



1. Type an address or part of an address to search for in the **Search by Address** field.

2. Click the lookup icon to return the search results below the search criteria, or click the X icon to clear the search criteria.

3. Locate the appropriate search result if clicking the lookup icon. Use the page navigation buttons at the bottom of the pane if necessary.

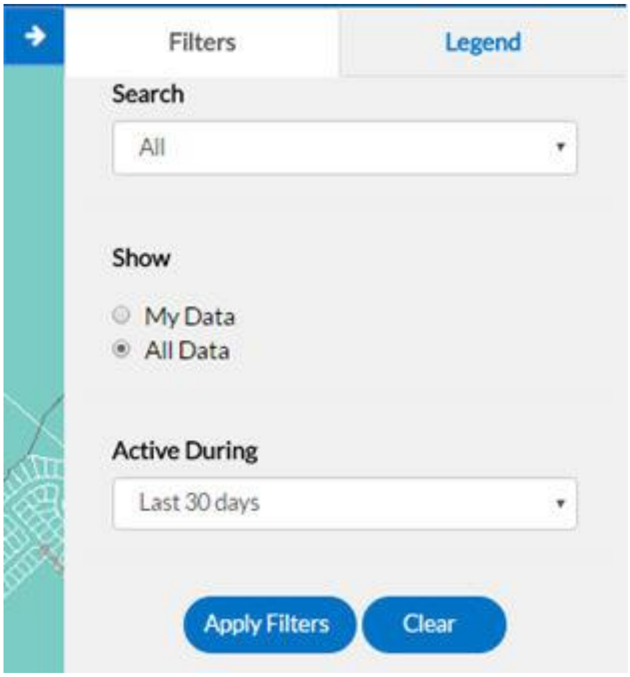
4. Click 1 of the listed search results to view the associated parcel, parcel owner, permits, plans, and inspections. If only 1 search result returns, simply view the information.

5. Click **Back to list** to return to the list of search results.

6. To drop a pin on a parcel and return search results regarding the parcel selected, click the pin icon and then click the parcel of land. The search results display on the left.

7. Click the arrow icon at the top of the search criteria pane to collapse or expand the pane.

8. Click the arrow icon at the top, right corner of the map to collapse or expand the Filters and Legend pane.



9. Choose the Filters tab to enter information to narrow search results.

10. Select whether to search by *Permits*, *Plans*, *Inspections*, or *All* from the **Search** dropdown.

11. Select the appropriate option in the **Show** field. Available selections depend on the selection made from the **Search**dropdown.

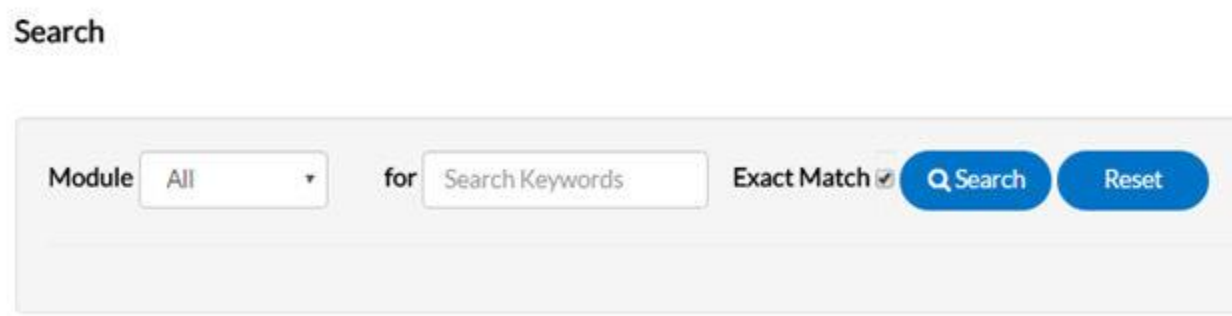
12. Select the appropriate active time span (*Last 30 days, Last 60 days,* or *Last 90 days*) from the **Active During** dropdown.

13. Select the appropriate applied for time span (*Last 30 days, Last 60 days,* or *Last 90 days*) from the **Applied During**dropdown if available.

14. Choose the Legend tab to view the significance of icons that appear on the map.

Search

Citizens can perform robust searches across several key areas on the site (i.e., permits, plans, inspections, and addresses) from 1 centrally accessible location. Users do not have to log in to site to access the global search tool.



Select the type of record to search for from the Module dropdown.

All

1. Type relevant search keywords in the **for** field.

2. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria.

Permit

Users do not have to utilize all fields.

1. Type at least part of the permit number to search for in the **Permit Number** field.

2. Type at least part of the name of the project associated to the permit to search for in the **Project Name** field.

3. Select the type of permit to search for from the **Permit Type** dropdown.

4. Type at least part of the number of the parcel associated to the permit to search for in the **Parcel Number** field.

5. Type at least part of the address associated to the permit to search for in the **Address** field.

6. Type a range of permit application dates to search for permits within in the **Applied Date** and **To** fields, or click the calendar icons to select the dates.

7. Type a range of permit issue dates to search for permits within in the **Issue Date** and **To** fields, or click the calendar icons to select the dates.

8. Type a range of permit expiration dates to search for permits within in the **Expire Date** and **To** fields, or click the calendar icons to select the dates.

9. Type a range of permit finalization dates to search for permits within in the **Finalized Date** and **To** fields, or click the calendar icons to select the dates.

10. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

Plan

Users do not have to utilize all fields.

1. Type at least part of the plan number to search for in the **Plan Number** field.

2. Type at least part of the name of the project associated to the plan to search for in the **Project Name** field.

3. Select the type of plan to search for from the **Plan Type** dropdown.

4. Type at least part of the number of the parcel associated to the plan to search for in the **Parcel Number** field.

5. Type at least part of the address associated to the plan to search for in the **Address** field.

6. Type a range of plan application dates to search for plans within in the **Applied Date** and **To** fields, or click the calendar icons to select the dates.

7. Type a range of plan completion dates to search for plans within in the **Complete Date** and **To** fields, or click the calendar icons to select the dates.

8. Type a range of plan expiration dates to search for plans within in the **Expire Date** and **To** fields, or click the calendar icons to select the dates.

9. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

Inspections

Users do not have to utilize all fields.

1. Type at least part of the inspection number to search for in the **Inspection Number** field.

2. Type at least part of the number of the parcel associated to the inspection to search for in the **Parcel Number** field.

3. Type at least part of the address associated to the inspection to search for in the **Address** field.

4. Type a range of inspection request dates to search for inspections within in the **Requested Date** and **To** fields, or click the calendar icons to select the dates.

5. Type a range of inspection schedule dates to search for inspections within in the **Scheduled Date** and **To** fields, or click the calendar icons to select the dates.

6. Click **Search** to display a list of results that meet the search criteria. Click **Reset** to clear the entered search criteria. Click **Advanced** to hide the search criteria.

Site Feature List

Feature	Help	Description
ADA Compliance		The site is Americans with Disabilites Act (ADA)-compliant at the WCAG 2.0 AA level. Numerous features are designed to make the site accessible to individuals with various impairments.
Calendar	NEW	This allows users to view information on a visual calendar.
Draft Saving		Users can begin applying for cases and resume the application process later. This is helpful when users want to save completed work and then continue when they're ready.
GIS Maps	NEW	The site integrates with ESRI map functionality. The maps allow for powerful searches, pinned results, EnerGov data incorporation, layers, filters, a legend, and more. The map is available to both logged in and logged out users.
Global Search	NEW	Citizens can perform robust searches across several key areas (i.e., permits, plans, inspections, and addresses) from one centrally accessible location.
Invoice Management	NEW	Users are able to access invoices that are paid, voided, or unpaid. Invoices are accessible from the dashboard and the menu system and can be added to the electronic shopping cart.
Metric Dashboards	NEW	Visual dashboards display data that is contextual to the logged in user. The dashboard communicates the statuses and counts of several key items (i.e., permits plans, inspections, and invoices).

Mobile Capabilities		The fully functional site can be accessed on mobile devices without having to install or configure any mobile applications. The sites adjust to screen sizes automatically.
Permits & Plans	NEW	Core functionality allows permits and plans to be viewed online.
Personalization	NEW	Logged in users can view their own permits, plans, inspections, and invoices.
Printable Reports		Printable reports are available from the site where allowed. Examples include permits and invoices. These documents can be printed and/or saved to PDF on demand based on business rules.
Request Inspections	NEW	Registered users are able to request inspections. Multiple related/unrelated inspections can be requested simultaneously. Inspection requests interact with the inspection-related data on the dashboard.
Shopping Cart	NEW	The integrated electronic shopping cart allows citizens to view, add, pay, or remove invoices, and displays single or multiple cases associated with each invoice.
User Registration	NEW	User registration includes several key features: user profiles, user account registration, password retrieval, automatic EnerGov global entity recognition, secure authentication, and more.