

Oracle Public Sector Compliance and Regulation

Implementing Your Agency

May 2019

Contents

Preface

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1 Setting Up Your Agency

1

Setting Up Agencies	1
Setting Up Countries	4
Setting Up States	5
Setting Up Cities	6
Setting Up Counties	7
Setting Up Currencies	8
Setting Up Holiday Calendars	9
Setting Up Work Schedules	11
Setting Up Ownership Types	12
Setting Up Property Types	13
Setting Up Property Conditions	14
Setting Up Units of Measure	15
Setting Up Unit of Measure Conversions	16
Setting Up Conditions	17
Setting Up Autonumbering	19
Setting Up Contact Types	23
Setting Up Project Types	24
Setting Up Code Types	25
Setting Up Code References	26
Setting Up Public Users	28
Setting Up Public User Roles	31
Setting Up Terms of Use	32
Delivered Communication Events	35
Setting Up Communication Events	39
Setting Up Reports	42
Setting Up Document Categories and Subcategories	44
Setting Up Document Groups	45
Setting Up Dashboards	47
Setting Up Lookups	48

Setting Up Data Format Exchange Maps 52

2 Setting Up Your Agency Staff 55

Setting Up a Fusion Business Unit and Legal Entity 55

Defining Job Titles 58

Setting Up Agency Staff 58

Configuring Agency Job Groups 60

Managing Agency Staff Profiles 61

Importing Agency Staff Data 63

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

This topic explains the text conventions used in this guide and points you to where you can find more information about using Oracle applications.

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
<code>monospace</code>	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Additional Resources

- Community: Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the [Oracle Help Center](#) to find guides and videos.
- Training: Take courses on Oracle Cloud from [Oracle University](#).

Documentation Accessibility

This topic covers accessibility concepts for this guide.

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

This topic explains how to contact Oracle for support and to provide feedback.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Public Sector Compliance and Regulation applications help and guides! You can send an e-mail to: PSCR_US@oracle.com.

Oracle Public Sector Compliance and Regulation
Implementing Your Agency

May 2019

Part Number: F12008-02

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1 Setting Up Your Agency

Setting Up Agencies

An agency is an organization that offers a range of services to its constituents, including issuing permits and licenses.

Administrators add and modify agency information using the Agency page.

Adding an Agency

1. Select **Common Setup > Agency**.
2. On the Agency Information tab, click **Add**.
3. On the Agency Information - Details page, enter values for the following fields:

Page Elements	Definition
Agency ID	Enter the number 1 as the ID for your agency.
Name and Description	Enter a name and a short description for the agency.
Country	Enter the country in which the agency is located. This value is informational only. Address fields throughout the system support only USA addresses.
Currency	Enter the currency that the agency uses for financial transactions. This value is informational only. It does not affect the currencies for fees, cash drawers, or payment adaptors.
Time Zone	Select your agency's local time zone. All times displayed in Oracle Public Sector Compliance and Regulation use this time zone.
Parcel Owner Format	This field is reserved for future functionality. Currently, regardless of your selection, parcels have one field to identify the parcel owner and an additional field to identify a secondary owner.
Time Format, Date Format, and Number Format	Select the default formats that the agency uses to display times, dates, and numbers for anonymous users.

4. Click **Save**.

Modifying an Agency

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Update the agency information field values.

4. Click **Save**.

Adding an Agency Address


1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information page.
3. Select the Addresses tab, and click **Add**.
4. On the Addresses - Details page, enter values for the following fields:

Page Elements	Definition
Address ID	Enter a unique ID for the address.
Primary	Select to indicate that this is the primary address for the agency. An agency may have only one primary address.
From Date and To Date	Enter the date range for which the address is valid.
Zip Code	<p>If you know the zip code for the address, enter it here. The system automatically populates the City and State based on the zip code you enter.</p> <p>If you don't know the zip code, click the don't know link to narrow down your choice of zip codes by entering a city and state.</p>
Address Line 1 and Address Line 2	Enter the street number or post office box number, along with any additional address information such as apartment or suite number.
City and State	Enter the city and state for the address.
Postal Code	Enter the postal code for the address. The available values for this field are filtered based on the city and state that you select.

5. Click **Save**.

Modifying an Agency Address

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Select the Addresses tab.
4. Click a row on the Addresses tab. You can:
 - o Update the agency address field values.

 **Note:** You cannot change a primary address row to non-primary. Instead, when you update a non-primary row to primary, all other address rows are saved as non-primary.


- o Delete the address. You will be prompted to confirm the permanent deletion.

 **Note:** You cannot delete primary address rows.

5. Click **Save**.


Deleting an Agency Address

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Select the Address tab.
4. Click **Edit**.
5. Select the check boxes next to all the agency addresses that you want to delete.
6. Click **Delete**. You will be prompted to confirm the permanent deletion.

 **Note:** You cannot delete primary address rows. To delete an address row that is designated as primary, you must first designate a different address row as primary. This changes the previously primary row to non-primary, allowing it to be deleted.

Modifying Permit Options

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Select the Features tab.
4. Click **Options** for the Permits offering.
5. On the Permit Options page, you can update values for the following fields:

Page Elements	Definition
Oracle Policy Automation ID	Enter the unique identifier for the agency's Oracle Policy Automation definition.
Message Title	Enter a short text version of the landing page message in a title format. If you leave this field blank, the value in the Label field on the Link Details page for the menu navigation link Online Permits is displayed.
Message Summary	Enter a longer version of the landing page message title in a sentence format. If you leave this field blank, the value in the Description field on the Link Details page for the menu navigation link Online Permits is displayed.
Button Content URL	Enter a content URL for the Read More button. Public users click this button to access the agency's own permit information page, outside of Oracle Public Sector Permits. If you leave this field blank, the Read More button opens a dialog box that displays the Landing Page Message .
	<p> Note: If you want to link to a page outside of Oracle Public Sector Permits, you must enter a URL here.</p>
Landing Page Message	Enter a welcome message in rich text to appear in a dialog box on the landing page, if a URL to access the agency's page is not defined.

For more information on Oracle Policy Automation, see [Overview of Oracle Policy Automation Configuration](#).

For more information on the Landing Page Message Definition, see [Defining Summary Details](#).

Enabling and Disabling the Permits Offering

1. Select **Common Setup > Agency** .
2. Click a row on the Agency Information tab.
3. Select the Features tab to view the Permits offering for an agency.
4. Enable or disable the Permits offering using the **Enable** switch.

Setting Up Countries

A country definition includes the country name and various identifying codes.

You add, modify, and delete countries on the Country page.

Adding a Country


1. Select **Common Setup > Country** .
2. On the Country page, click **Add**.
3. On the Country Details page, enter values for the following fields:

Page Element	Description
Country Code	Enter a the unique code that your system uses for the country. For example, you might enter FRA for France.
ISO Alpha 2 Code	Enter the two-letter International Organization of Standardization (ISO) code for the country. For example, you would enter FR as the code for France.
ISO Numeric 3 Code	Enter the three-digit United Nations (UN) M.49 code for the country. For example, you would enter 250 as the code for France.
Country Name	Enter the name of the country as it appears in your system.

4. Click **Save**.

Modifying a Country

1. Select **Common Setup > Country** .
2. Click a row on the Country page.
3. On the Country Details page you can:
 - o Update the country field values.

 **Note:** You cannot edit the **Country Code**.

- o Delete the country. You will be prompted to confirm the permanent deletion.

4. Click **Save**.

Deleting Countries

1. Select **Common Setup > Country**.
2. Click **Edit**.
3. Select the check boxes next to all the countries you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up States

A state definition includes information such as the state name, country, and various ID codes.

You add, modify, and delete states on the State page.

Adding a State

1. Select **Common Setup > State**.
2. On the State page, click **Add**.
3. On the State Details page, enter values for the following fields:

Page Element	Description
Country	Enter the code for the country that the state is in.
State Code ISO	Enter the International Organization of Standardization (ISO) code for the state.
Code	Enter the unique code that your system uses for the state.
State Name	Enter the name of the state.
Type	Enter the subdivision type.
GNIS ID	Enter the Geographic Names Information System (GNIS) ID for the state's location.

4. Click **Save**.

Modifying a State

1. Select **Common Setup > State**.
2. Click a row on the State page.
3. On the State Details page you can:
 - o Update the state field values.

 **Note:** You cannot edit the **Country** or **State Code ISO** fields.

- Delete the state. You will be prompted to confirm the permanent deletion.
4. Click **Save**.

Deleting States

1. Select **Common Setup > State**.
2. Click **Edit**.
3. Select the check boxes next to all the states you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Cities

A city definition includes information such as the city name, country, state, and certain ID codes.

You add, modify, and delete cities on the City page.

Adding a City

1. Select **Common Setup > City**.
2. On the City page, click **Add**.
3. On the City Details page, enter values for the following fields:

Page Element	Description
Country Code and State Code	Enter the codes for the country and state in which the city is located.
County	Enter the five-digit International Committee for Information Technology Standards (INCITS) code for the county in which the city is located.
FIPS Code	Enter the seven-digit Federal Information Processing Standard (FIPS) code for the city.
City Name	Enter the name of the city.
GNIS ID	Enter the Geographic Names Information System (GNIS) ID for the city's location.

4. Click **Save**.

Modifying a City

1. Select **Common Setup > City**.
2. Click a row on the City page.
3. On the City Details page you can:
 - Update the city field values.

 **Note:** You cannot edit the **Country Code**, **State Code**, or **County** fields.

- Delete the city. You will be prompted to confirm the permanent deletion.
4. Click **Save**.

Deleting Cities

1. Select **Common Setup > City**.
2. Click **Edit**.
3. Select the check boxes next to all the cities you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Counties

A county definition includes information such as the county name, country, state, and certain ID codes.

You add, modify, and delete counties on the County page.

Adding a County

1. Select **Common Setup > County**.
2. On the County page, click **Add**.
3. On the County Details page, enter values for the following fields:

Page Element	Description
Country and State	Enter the codes for the country and state that the county is in.
INCITS Code	Enter the five-digit International Committee for Information Technology Standards (INCITS) code for the county.
County Name	Enter the name of the county.
FIPS Code	Enter the seven-digit Federal Information Processing Standard (FIPS) code for the county.
GNIS ID	Enter the Geographic Names Information System (GNIS) ID for the county's location.

4. Click **Save**.

Modifying a County

1. Select **Common Setup > County**.
2. Click a row on the County page.
3. On the County Details page you can:
 - Update the county field values.

 **Note:** You cannot edit the **Country**, **State**, or **INCITS Code** fields.

- Delete the county. You will be prompted to confirm the permanent deletion.
4. Click **Save**.

Deleting Counties

1. Select **Common Setup > County** .
2. Click **Edit**.
3. Select the check boxes next to all the counties you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Currencies

A currency definition includes currency codes, a description, and the number of decimals that can be used to represent an amount in the currency.

You add, modify, and delete currencies on the Currency page.

Adding a Currency


1. Select **Common Setup > Currency** .
2. On the Currency page, click **Add**.
3. On the Currency Details page, enter values for the following fields:

Page Element	Description
Currency Code	Enter a the unique code that your system uses for the currency.
ISO Code	Enter the three-digit International Organization of Standardization (ISO) 4217 numeric code for the currency. For example, you would enter 840 for the US dollar.
Description	Enter a short description of the currency.
Decimal Position	Enter the number of decimal places that can be used to represent an amount for the currency. For example, the United States dollar uses two decimal positions.

4. Click **Save**.

Modifying a Currency

1. Select **Common Setup > Currency** .
2. Click a row on the Currency page.
3. On the Currency Details page you can:
 - Update the currency field values.

 **Note:** You cannot edit the **Currency Code** field.

- Delete the currency. You will be prompted to confirm the permanent deletion.
4. Click **Save**.

Deleting Currencies

1. Select **Common Setup > Currency**.
2. Click **Edit**.
3. Select the check boxes next to all the currencies you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Holiday Calendars

Holiday calendars establish the days that agency offices are closed and no field service operations are offered.

These days appear as unavailable, non-working days in calendar views throughout the system such as for public user and inspector calendars. Non-working days in holiday calendars apply to all employees and do not need to be defined for employee profiles.

Each holiday calendar spans a date range that you define. Within that date range, you define individual events for each non-working holiday.

Administrators add, modify, and delete holiday schedules and events on the Holiday Calendar page.

Adding a Holiday Calendar


1. Select **Common Setup > Holiday Calendar**.
2. On the Holiday Calendar page, click **Add**.
3. On the Holiday Calendar Details page, enter values for the following fields:

Page Element	Description
Calendar ID and Description	Enter a unique ID and description for the calendar. For example, you might enter an ID of 2019 and a description of Holiday Calendar 2019.
Valid from Date and Valid to Date	Enter the date range for the holiday calendar. For example, you might enter a Valid from Date of 2019-01-01 and a Valid to Date of 2019-12-31 to represent a calendar that spans the entire 2019 calendar year.

4. Add an event.

 **Note:** You must have values defined for all required holiday calendar fields before you can add an event.

5. Click **Save**.


 **Note:** When you click **Save**, the Holiday Calendar page closes.

Adding an Event


1. Select **Common Setup > Holiday Calendar** .
2. Click a row on the Holiday Calendar page.
3. On the Holiday Schedule Details page, click **Add**.
4. On the Event Details page, enter an **Event ID**, an **Event Date**, and a **Description** for the event. For example, you might enter an ID of MD, a date of May 29, 2017, and a description of Memorial Day.
5. Click **Save**.

Modifying a Holiday Calendar

1. Select **Common Setup > Holiday Calendar** .
2. Click a row on the Holiday Calendar page.
3. On the Holiday Calendar Details page you can:
 - o Update the holiday schedule field values.

 **Note:** You cannot edit the **Calendar ID**.

- o Delete the holiday calendar. You will be prompted to confirm the permanent deletion.
 - o Add, modify, or delete events.
4. Click **Save**.

 **Note:** When you click **Save**, the Holiday Calendar page closes.

Modifying an Event

1. Click a row on the Holiday Calendar Details page.
2. On the Event Details page you can:
 - o Update the event date or description.
 - o Delete the event. You will be prompted to confirm the permanent deletion.
3. Click **Save**.

Deleting Holiday Calendars

1. Select **Common Setup > Holiday Calendar** .
2. Click **Edit**.
3. Select the check boxes next to all the holiday schedules you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Deleting Events

1. Click **Edit** on the Holiday Calendar Details page.
2. Select the check boxes next to all the events you want to delete.
3. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Work Schedules


Work schedules establish the days of the week and daily hours of operation for agency employees.

Create schedules based on the type of employee and work location. Calendar views, such as inspector calendars, reference work schedules to determine the time slots that are displayed on the calendar as available for scheduling. Algorithms for assigning resources also use work schedules to determine availability. You assign work schedules to employee profiles using the Agency Staff page. See [Setting Up Agency Staff](#).


Administrators and business analysts add, modify, and delete work schedules on the Work Schedule page.

Adding a Work Schedule

1. Select **Common > Work Schedule**.
2. On the Work Schedule page, click **Add**.
3. On the Work Schedule Details page, enter values for the following fields:

Page Element	Description
Schedule ID and Description	Enter a unique ID and description for the schedule. For example, you might enter an ID of OFFICESAT and a description of Saturday Office Schedule.
Start Date	Enter the first day of the schedule.
End Date	Enter the last date of the schedule. You can leave this field blank to give the schedule an open end date.
Work Start Time and Work End Time	Enter the start and end time for the schedule. For example, you might enter a work start time of 09:00 AM and a work end time of 05:00 PM.
Break Start Time and Break End Time	Enter the start and end time for a break within the schedule. For example, you might enter a break start time of 12:00 PM and a break end time of 01:00 PM.
	 Note: These fields are optional, but if you enter a break start time, you must also enter a break end time.
Recurrence and Weeks Between Occurrences	Select whether the schedule reoccurs weekly and how many weeks are between each occurrence. For example, if you select a recurrence of Weekly with 1 week between occurrences, the schedule repeats every week.
Work Days	Select the days of the weeks to which the schedule applies.

4. Click **Save**.

-  **Note:** For overnight work shifts that go past 12 am (midnight), you must create two schedules: one for the time period up until midnight, and one for the time period after midnight. For example, to create a weekday overnight shift that starts at 09:00 pm and ends at 06:00 am the following day, the first schedule would have a start time of 09:00 pm and an end time of 12:00 am on Monday through Friday. The second schedule would have a start time of 12:00 am and an end time of 06:00 am on Tuesday through Saturday.

Modifying a Work Schedule

1. Select **Common > Work Schedule** .
2. Click a row on the Work Schedule page.
3. On the Work Schedule Details page you can:
 - o Update the work schedule field values.

 **Note:** You cannot edit the **Schedule ID** field.

- o Delete the schedule. You will be prompted to confirm the permanent deletion.
4. Click **Save**.

Deleting Work Schedules

1. Select **Common > Work Schedule** .
2. Click **Edit**.
3. Select the check boxes next to all the work schedules you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Ownership Types

Ownership type indicates how a business was established; for example, a corporation or a nonprofit. You set up ownership types for your agency on the Ownership Type page.

Adding an Ownership Type

1. Select **Common Setup > Ownership Type** .
2. On the Ownership Type page, click **Add New** to add an ownership type.
3. On the Ownership Type Details page, enter a name for the ownership type.
4. Enter a description.
5. Verify that the **Enabled** switch is turned on. The switch is turned on by default for a new ownership type.
6. Click **Save**.

Modifying an Ownership Type

1. Select **Common Setup > Ownership Type** e.
2. On the Ownership Type page, click the row for the ownership type that you want to modify.
3. On the Ownership Type Details page you can:

- o Modify the ownership type description. You cannot change the name.
 - o Click the **Enabled** switch to enable or disable the ownership type.
4. If you made any changes, click **Save**.

Deleting an Ownership Type

1. Select **Common Setup > Ownership Type**.
2. On the Ownership Type page, click the row for the ownership type that you want to delete.
3. On the Ownership Type Details page, click **Delete**.
4. If you want to delete multiple ownership types, you can delete them from the Ownership Type page:
 - a. Click **Edit**.
 - b. Select the check boxes for the ownership type rows to delete.
 - c. Click the **Delete** icon.

Setting Up Property Types

Property type categorize properties according to criteria such as how the property is used or the type of dwelling.

You add, modify, and delete property types on the Property Type page.

Adding a Property Type

1. Select **Common Setup > Property Type**.
2. On the Property Type page, click **Add**.
3. On the Property Type Detail page, enter values for the following fields:

Page Element	Description
Property Type	Enter the type of property, such as Residential or Commercial.
Description	Enter a property type description.

4. Verify that the **Enabled** switch is turned on.
The switch is on by default for a new property type.
5. Click **Save**.

Modifying a Property Type

1. Select **Common Setup > Property Type**.
2. Click a row on the Property Type page.
3. On the Property Type Detail page you can:
 - o Update the property type description.
 - o Turn off the **Enabled** switch to deactivate the property type.

4. Click **Save**.

Deleting Property Types

1. Select **Common Setup > Property Type**.
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Property Type Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit**.
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete**.You will be prompted to confirm the permanent deletion.

Setting Up Property Conditions

A property condition identifies the general condition of the property. This value is used to indicate the general age of a property, a property's physical condition, or other condition.

You add, modify, and delete property conditions on the Property Condition page.

Adding a Property Condition

1. Select **Common Setup > Property Condition**.
2. On the Property Condition page, click **Add**.
3. On the Property Condition Detail page, enter values for the following fields:

Page Element	Description
Property Condition	Enter the property condition, such as Poor or Good.
Description	Enter a description of the property condition.

4. Verify that the **Enabled** switch is turned on.
The switch is on by default for a new property condition.
5. Click **Save**.

Modifying a Property Condition

1. Select **Common Setup > Property Condition**.
2. Click a row on the Property Condition page.
3. On the Property Condition Detail page you can:
 - o Update the property condition description.
 - o Turn off the **Enabled** switch to deactivate the property type.
4. Click **Save**.

Deleting Property Conditions

1. Select **Common Setup > Property Condition.**
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Property Condition Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit.**
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete.**

You will be prompted to confirm the permanent deletion.

Setting Up Units of Measure

Units of measure are used to express measurements such as quantity or duration. Each unit of measure must have a unit type such as Length, Area, or Time.

You add, modify, and delete units of measure on the Unit of Measure page.

Adding a Unit of Measure

1. Select **Common Setup > UOM.**
2. On the Unit of Measure page, click **Add.**
3. On the Unit of Measure Details page, enter values for the following fields:

Page Element	Description
Unit of Measure	Enter a unique unit of measure ID.
Description	Enter a description of the unit of measure.
Unit Type	Select one of these unit types: Length, Area, Angle, Volume, or Time.
ISO Code	Enter the ISO unit of measure code.

4. Click **Save.**

Modifying a Unit of Measure

1. Select **Common Setup > UOM.**
2. Click a row on the Unit of Measure page.
3. On the Unit of Measure Details page, make the necessary modifications.
4. Click **Save.**

Deleting Units of Measure

1. Select **Common Setup > UOM.**

2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Unit of Measure Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit**.
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete**.

You will be prompted to confirm the permanent deletion.

Setting Up Unit of Measure Conversions

A unit of measure (UOM) conversion definition specifies the factor for converting a unit of measure to an equivalent amount of a different unit of measure.

You add, modify, and delete unit of measure conversions on the UOM Conversion page.

Adding a UOM Conversion

1. Select **Common Setup > UOM Conversion**.
2. On the UOM Conversion page, click **Add**.
3. On the UOM Conversion Detail page, enter values for the following fields:

Page Element	Description
UOM	Select the unit of measure that is the starting unit for the conversion.
UOM To	Enter the target unit of measure. This unit of measure must be the same type as the original unit of measure. For example, you can convert a unit of length to another unit of length, but you can't convert a unit of length to a unit of weight.
Conversion Rate	Enter the conversion factor used to convert the original unit of measure to the target unit of measure. For example, to convert minutes to hours, enter a conversion rate of 60.

4. Verify that the **Enabled** switch is turned on.
The switch is on by default for a new UOM conversion.
5. Click **Save**.

Modifying a UOM Conversion

1. Select **Common Setup > UOM Conversion**.
2. Click a row on the UOM Conversion page.
3. On the UOM Conversion Detail page you can:
 - o Update the UOM conversion field values.
 - o Disable the UOM conversion by turning the **Enabled** switch off.
4. Click **Save**.

Deleting UOM Conversions

1. Select **Common Setup > UOM Conversion**.
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Unit of Measure Conversion Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit**.
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete**.

You will be prompted to confirm the permanent deletion.

Setting Up Conditions

A condition indicates a dependency or contingency for completing the application process. You set up conditions on the Conditions page.

You add, modify, and delete conditions on the Conditions page.

Condition Overview

A condition indicates a status, criterion, or action that can apply to an object in the system, such as a permit or a planning application.

Conditions are defined with a severity that might affect operations when applied. Condition rules with a **Hold** severity prevent one or more of the operations that are selected at the time of applying the condition. Condition rules with a **Lock** severity prevent all operations as described in the table here.

Rule	Applicable Objects	Usage
Prevent New	Parcel	Agency staff applies a condition to a parcel record that prevents an applicant from submitting any new permit or planning application that contains a parcel object.
Prevent Workflow Advancing	Permit and planning application	Agency staff applies a condition to a permit or planning application record that prevents workflow from advancing. The permit or planning application workflow tasks cannot be completed until the condition is resolved.
Prevent Issue or Final	Permit	Agency staff applies a condition to a permit record that prevents the permit cycle from completing its final step until the condition is resolved. Your workflow process definition must explicitly identify the final human task that is blocked by this condition. Use the PSC_FINAL_ACTIVITY custom property

Rule	Applicable Objects	Usage
		to identify this task. See Using Custom Properties .
Restrict Payment	Permit and planning application	Agency staff applies a condition to a permit or a planning application record that prevents a user from processing a payment.
Prevent Inspection Schedule	Permit	This condition rule prevents agency staff from scheduling a new inspection. It does not affect existing inspections that have already been scheduled.
Prevent Inspection Result	Permit	This condition rule prevents agency staff from finalizing the inspection results.

Adding Conditions

1. Select **Common Setup > Condition**.
2. On the Condition page, click the **Add New** button.
3. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	Enter a unique condition name.
Object Type	Select an object type to categorize the condition, based on the object type to which it is applied: <ul style="list-style-type: none"> <input type="radio"/> Parcel <input type="radio"/> Transaction (includes permit and planning applications)
Display Message	Enter a message that will be displayed to external users, up to 150 characters.
Severity	Select a severity level for each condition from these options: <ul style="list-style-type: none"> <input type="radio"/> Lock <p>At the most severe level, the Lock condition suspends all operations, including workflow advancing, payment processing, inspection scheduling, and inspection results.</p> <input type="radio"/> Hold <p>Agency staff can select which rules to apply to conditions with the Hold level of severity.</p> <input type="radio"/> Notice <p>The Notice level functions as an alert and has no effect on operations. For more information, see Applying Conditions to Applications.</p>
Description	Enter a description.


4. Verify that the **Enabled** switch is turned on. New conditions are active by default.
5. Click **Save**.

Modifying Conditions

1. Select **Common Setup > Condition**.
2. Click a row on the Condition page.
3. On the Condition Details page you can update the display message, severity, description, and the **Enable** switch.
4. Click **Save**.

Deleting Conditions

1. Select **Common > Condition**
2. Click a row on the Condition page.
3. On the Condition Details page, click **Delete** to delete the condition.

 **Note:** You can delete a condition only if it is not applied to any object such as a parcel, permit, or a planning application. If you try to delete a condition that is applied to a permit, you will see an error message stating that you cannot remove the condition because it has already been applied.

See the documentation for [Applying Conditions to Applications](#).

Setting Up Autonumbering

Set up autonumber rules to increment identifying numbers for documents such as permits and invoices. The identifying numbers can include multiple parts, and each part can represent either a sequential number, static text, or a date.

You add, modify, and delete autonumber rules on the Autonumber page.

This example illustrates the Autonumber Details page.

Autonumber Details

Rule Header

* Rule Name [Copy Existing Rule](#)

* Description

* Maximum Size

* Number Type

Reset Sequential Number

Rule Definition

Number of Parts Next Number Preview PER-1000000-JUL18

Part 1 Separator


Part 2 Maximum Length Zero-padding Separator

Part 3

Adding an Autonumber Rule

1. Select **Common Setup > Autonumber**.
2. On the Autonumber page, click **Add**.
3. On the Autonumber Details page, enter values for the fields in the **Rule Header** section:

Page Element	Description
Rule Name	Enter a unique name for the rule.
Copy Existing Rule	<p>Click this link to copy the rule definition from an existing autonumber rule. The copy action copies the number type and the reset frequency as well as the actual rule definition.</p> <p>Clicking the link opens a a modal window with a list of existing autonumber definitions. Locate the definition you want to copy, then click the Select button for that definition</p>
Description	Enter a description for the autonumber rule.
Maximum Size	Indicate the maximum length of the generated number.
	<p> Note: As you set up your autonumber rule, take care that the maximum size of the autonumber accommodates the maximum length of each part of the identifier plus any separators that you define.</p>
Number Type	Select the type of object to that can use this autonumber rule:

Page Element	Description
	<ul style="list-style-type: none"> ○ Cashier session <p> Note: If you select this number type, make sure that the parts that you define for the rule have a part type of Sequential only.</p> <ul style="list-style-type: none"> ○ Deposit slip ○ Inspection ○ Invoice ○ Permit ○ Planning application ○ Project ○ Receipt <p>These values are defined on the Lookup Type Details page for the ORA_PSC_CC_AUTONUM_TYPE lookup type.</p>


Reset Sequential Number	<p>The identifier that an autonumber rule generates can include a mix of static text, a date, and a sequential number. Select how often the sequential number portion of the identifier is reset to zero:</p> <ul style="list-style-type: none"> ○ None: Sequential numbers continue to increment as defined without resetting. ○ Monthly: The sequential number portion of the identifier resets to zero at the beginning of each month. ○ Yearly: The sequential number portion of the identifier resets to zero at the beginning of each year.
--------------------------------	--

4. In the **Rule Definition** section of the page, enter the number of parts, or segments, for the rule:

Page Element	Description
Number of Parts	<p>Select the number of parts, or segments, comprising the rule, up to 5 parts. Segments can be static text, a date, or a sequential number.</p> <p>For example, the identifier IVC-0000010067-OCT10 is made of 3 segments (static text, then a sequential number, then a date) separated by hyphens. The identifier INVOICE_001 is made of 2 segments (static text and a sequential number) separated by an underscore.</p> <p>When you select the number of parts, the corresponding number of rows appear in the rule definition grid. For example, if there are two parts, then rows labeled Part 1 and Part 2 appear.</p>

5. In the rule definition grid, select the part type for each row, then enter the related information in the additional fields that appear.

Part Type	Related Information
Static Text	In the unlabeled field that appears next to the part type, enter text that remains the same for all identifiers. For example, enter IVC or INVOICE.

Part Type	Related Information
	<p style="text-align: center;"> Note: Do not include spaces in the static text.</p> <p>Cashier session IDs must be numeric, so don't include any static text in an autonumber definition with the Cashier Session number type.</p>
Sequential	<ul style="list-style-type: none"> a. In the unlabeled field that appears next to the part type, enter the next document number to use. The number must be 1 or greater. The system increases this number by one each time a new identifier is generated and saved. b. In the Maximum Length field, Enter the maximum number of digits for the sequential number. Select a number from one to ten. c. Select the Zero Padding check box to add zeros before the generated number to make up the number of digits in the definition. For example, if the maximum length of this part is 5 digits, and the current number is 15, zero padding formats this part as 00015.
Date	<p>In the unlabeled field that appears next to the part type, select the date format.</p> <p>The available date formats are made of these date codes in various combination:</p> <ul style="list-style-type: none"> o Years: YYYY represents the year with its full four digits, and YY represents the year by its last two digits. o Months: MM represents the month as a two-digit number, and MMM represents the month as a three-character abbreviation such as JAN for January. o Days: DD represents days as two-digit numbers. This is the only option for days. o Quarters: Q represents quarters. For example, the code for the first quarter of the year is 1. <p>Cashier session IDs must be numeric, so don't include any dates in an autonumber definition with the Cashier Session number type.</p>

6. In the rule grid, select a **Separator** to appear after each part except the last.

Select from the following separators:

- o (None)
- o - (hyphen)
- o / (forward slash)
- o * (asterisk)

7. Verify the generated number for the selected date format and separators in the **Next Number Preview** field.

8. Click **Save**.

An error appears if the overall maximum size of the autonumber doesn't accommodate the maximum lengths of all of the parts and separators that you define.

Modifying an Autonumber Rule

1. Select **Common Setup > Autonumber**.
2. On the Autonumber page, click the row you want to modify.
3. Update the rule header and rule definition fields on the Autonumber Details page.
4. Click **Save**.

Deleting an Autonumber Rule

1. Select **Common Setup > Autonumber**.
2. Click the row you want to modify.
3. On the Autonumber Details page, click **Delete**.

Setting Up Contact Types

A contact type describes the role or position of a contact person for a permit.

Contact types apply only to permit contacts, not to profile contacts. Permits have contacts if the Contact List element is included in the permit application.

You add, modify, and delete contact types on the Contact Type page.

Adding a Contact Type

1. Select **Common Setup > Contact Type**.
2. On the Contact Type page, click **Add**.
3. On the Contact Type Detail page, enter values for the following fields:

Page Element	Description
Contact Type	Enter the type of contact, such as Business Owner, Individual, or Emergency Contact.
Description	Enter a description of the contact type.

4. Verify that the **Enabled** switch is turned on.
The switch is on by default for a new contact type.
5. Click **Save**.

Modifying a Contact Type

1. Select **Common Setup > Contact Type**.
2. Click a row on the Contact Type page.
3. On the Contact Type Detail page you can:
 - o Update the contact type description. Only the **Description** field can be changed.
 - o Turn off the **Enabled** switch to deactivate the contact type.
4. Click **Save**.

Deleting Contact Types

1. Select **Common Setup > Contact Type**.
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Contact Type Details page.
3. To delete one or more definitions without viewing details:

- a. Click **Edit**.
- b. Select the check boxes next to the definitions that you want to delete.
- c. Click **Delete**.

You will be prompted to confirm the permanent deletion.

Setting Up Project Types

A project type describes the kind of project that an agency staff can select at the time of creating a project. You add new project types based on the nature of the project you are adding. Selection of a project type is mandatory while creating a new project, so, a minimum of one project type is required to be set up.

You add, modify, and delete project types on the Project Type page.

Adding a Project Type

1. Select **Common Setup > Project Type**.
2. On the Project Type page, click **Add**.
3. On the Project Type Detail page, enter values for the following fields:

Page Element	Description
Project Type	Enter the type of project, such as Commercial Project or Residential Project.
Rule ID	Select a rule ID. Rule ID is an autonumbering sequence that you set up for a particular project type. When you are creating a project with a certain project type, a project ID is generated based on the sequence defined for the project type. Rule IDs are created using the Autonumber page. For more information, see Setting Up Autonumbering .
Description	Enter a description of the project type.
Long Description	Enter a detailed description of the project type.


4. Verify that the **Enabled** switch is turned on. The switch is turned On by default for a new project type.
5. Click **Save**.

Modifying a Project Type

1. Select **Common Setup > Project Type**
2. Click a row on the Project Type page.
3. On the Project Type Detail page you can:
 - o Update the rule ID, description, and long description.
 - o Turn off the **Enabled** switch to deactivate the project type.
4. Click **Save**.

Deleting a Project Type

1. Select **Common Setup > Project Type**
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Project Type Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit** on the Project Type page.
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete**. You will be prompted to confirm the permanent deletion.

 **Note:** You can delete a project type only if it is **not** used by any project. When you attempt to delete a project type that is used by a project, the Public Sector Cloud Service displays a message that you cannot delete the project type as it is already in use by a project.

Setting Up Code Types

Code types are specific published codes, guidelines, ordinances, and so forth. Examples might include the International Building Code, published by the International Code Council (ICC), and the National Fire Code, published by the National Fire Protection Association (NFPA).

You add, modify, and delete code types on the Code Type page.

Adding a Code Type

1. Select **Common Setup > Code Type**.
2. On the Code Type page, click **Add**.
3. On the Code Type Detail page, enter values for the following fields:

Page Element	Description
Code Type ID	Enter a unique code type ID for a specific code type. For example, enter IFC for International Fire Code.
Name	Enter the complete name of the code type.
Description	Enter a description of the code type.

4. Click **Save**.

Modifying a Code Type

1. Select **Common Setup > Code Type**.
2. Click a row on the Code Type page.
3. On the Code Type Detail page you can update the code name and description.
4. Click **Save**.

Deleting Code Types

1. Select **Common Setup > Code Type**.
2. To view a definition before deleting it, click the row to be deleted, then click the **Delete** button on the Code Type Details page.
3. To delete one or more definitions without viewing details:
 - a. Click **Edit**.
 - b. Select the check boxes next to the definitions that you want to delete.
 - c. Click **Delete**.

You will be prompted to confirm the permanent deletion.

Setting Up Code References

Code references provide detailed specifications that come from a broad range of codes, guidelines, ordinances, and so forth. Even if the source document does not use the word “code,” use the Code References pages to enter the information into the system. A code reference maps to a specific section in the source document.

You add, modify, and delete code references on the Code Reference page.

This example illustrates the Code Reference Details page.

Code Reference Details

* Standard Type

* Standard Name

* Code Section

* Effective Start Date

Effective End Date

* Code Type

* Description

URL

Content To access instructions, place the cursor in the text editor and press Alt + 0.

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Emergency power systems shall automatically provide secondary power within 10 seconds after primary power is lost, unless specified otherwise in this code. Standby power systems shall automatically provide secondary power within 60 seconds after primary power is lost, unless specified otherwise in this code.

Prerequisites

Before you set up code references, you must define:

- Code types, which represent specific published documents that contain codes, guidelines, and so forth.
See [Setting Up Code Types](#).
- Standard types, which describe the different fields or disciplines that codes relate to. Examples might include fire safety or electrical systems.

Set up standards types by defining values for the ORA_PSC_CC_STD_CODE_TYPE lookup type. Define these values on the Lookup Type pages. See [Setting Up Lookups](#).

Adding a Code Reference

1. Select **Common Setup > Code Reference**.
2. On the Code Reference page, click **Add**.
3. On the Code Reference Detail page, enter values for the following fields:

Page Element	Description
Standard Type	Select the type of standard that the code falls under. Standard types represents fields or disciplines such as Materials, Engineering, or Installation.
Standard Name	Enter the title of the section that contains this code reference. This title comes from the source document.
Code Section	Enter the section number for this code reference. The number uniquely identifies this reference within the source document.
Effective Start Date and Effective End Date	Enter the official effective start date of the code reference, and optionally enter an end date.
Code Type	Select a code type from the values that you defined on the Code Type page. The code type identifies the source document. See Setting Up Code Types
Description	Enter a description of the reference.
URL	Enter a URL link to the source document.
Content	Enter detailed content copied from the source document.

4. Click **Save**.

Modifying a Code Reference

1. Select **Common Setup > Code Reference**.
2. Click a row on the Code Reference page.

3. On the Code Reference Detail page, make any necessary changes.
4. Click **Save**.

Deleting a Code Reference

1. Select **Common Setup > Code Reference**.
2. Click a row on the Code Reference page.
3. On the Code Reference Detail page, click **Delete**.

You will be prompted to confirm the permanent deletion.

Setting Up Public Users

Public user setup includes configuration options related to public user registration and account management.

This image illustrates the Public User Setup page.

Public User Setup

Terms of Use

- Require the user to accept the terms of use before registering

Terms of Use ID *

Contractor and License

- Agency staff verifies when a user's contractor status changes to yes
- Agency staff verifies when a user adds or updates a license

Attachments

- Allow agency staff and registered users to manage documents in account management
- Allow registered users to delete documents in account management

Privacy Consideration

- Ask if the user is a member of law enforcement or a judicial agency
- Verify the law enforcement or judicial agency status

Payment account

- Agency staff verifies when a user adds or updates a payment account

User Category

Enter a user category for appropriate notification content and URL redirection parameters for system access.

To set up public users:

1. Select **Common Setup > Public User Setup.**
2. In the **Terms of Use** section of the page, configure these options:

Page Element	Description
Require the user to accept the terms of use before registering	Select this check box if public users must accept your terms of use as part of the registration process.
Terms of Use ID	<p>If you require public users to accept your terms of use during registration, select the terms of use definition for the registration process.</p> <p>This field is visible only if the Require the user to accept the terms of use before registering check box is selected.</p>

Page Element	Description
--------------	-------------



Note:

If you change the Terms of Use ID, users who have already registered are required to accept the new terms the next time they sign in. In this scenario, a window with the new terms opens as soon as the public user signs in. The user must select the agreement check box in order to continue.

3. In the **Contractor and License** section of the page, configure these options:

Page Element	Description
--------------	-------------

Agency staff verifies when a user's contractor status changes to yes	Select this check box if agency staff must verify the contractor status of a public user who self-identifies as a contractor.
---	---

Agency staff verifies when a user adds or updates a license	Select this check box if agency staff must verify all licenses that are added to a user profile. Public users can add one license during the registration process. Public users and agency staff can add additional licenses using account management functionality.
--	--

4. In the **Attachments** section of the page, configure these options:

Page Element	Description
--------------	-------------

Allow agency staff and registered users to manage documents in account management	Select this check box to enable attachments in user accounts. When you enable attachments, both users and agency staff can add attachments to user accounts and modify information about existing attachments.
--	--

Agency staff can also delete attachments, but public users can't delete attachments unless you also select the "Allow registered users to delete documents in account management" check box on this page.

Allow registered users to delete documents in account management	Select this check box to allow public users to delete attachments that are associated with their account. This setting does not affect agency staff, who can always delete account attachments.
---	---

This check box is visible only if you enable attachments by selecting the "Allow agency staff and registered users to manage documents in account management" check box.

5. In the **Privacy Consideration** section of the page, configure these options:

Page Element	Description
--------------	-------------

Ask if the user is a member of law enforcement or a judicial agency	Select this check box if public users must answer a question that asks if the user is a member of the specified groups. If this option is active, name and contact information for users who are members of these groups are masked from public view.
--	---

Verify the law enforcement or judicial agency status	Select this check box if individuals are considered members of law enforcement or a judicial agency only after agency staff verifies the user's information.
---	--

If this check box is not selected, no further verification is required when users self-identify as members of these groups.

Page Element	Description
	This check box is visible only if the Ask if the user is a member of law enforcement or a judicial agency check box is selected.

6. In the **Payment Account** section of the page, configure this option:

Page Element	Description
Agency staff verifies when a user adds or updates a payment account	Select this check box if agency staff must verify all payment accounts (also called trust accounts) that are added to a user profile. Public users and agency staff can add payment accounts using account management functionality.

7. In the **User Category** section of the page, configure this option:

Page Element	Description
Enter a user category for appropriate notification content and URL redirection parameters for system access	<p>Enter the user category to be assigned to registered public users. Typically you should use the delivered category DEFAULT.</p> <p>The user category that you specify will be associated with user accounts that are created by the public user registration process.</p> <p>The category controls the templates for account-related notifications such as emails for first-time registration and for resetting the account password. The category also controls URL redirection so that when users set or reset their password in the Oracle Applications Cloud, they are immediately transferred to the public sector system.</p> <p>For more information about user categories, see Managing Users in Public Sector Compliance and Regulation and Setting the Next URL for the Default User Category.</p>

8. Click **Save**.

Setting Up Public User Roles

To ensure that registered public users have appropriate system access, you must define which role is assigned to the user IDs that are created during the registration process.

When a public user registers, the Oracle system assigns a single role to the new user. Because the user is assigned just one role, access to different areas of the system is established through a role hierarchy. In this hierarchy, the various roles that provide access to different areas of the system are all children of a single parent role that you create.

Setting up public user roles involves these steps:

1. Use the Security Console to create a specific set of roles for public user:

This step is explained in detail in the topic [Creating Custom Roles for Public Sector Community Development](#). It consists of these tasks:

- a. Create custom roles that provide access to permit-related functionality.
- b. Create the single role assigned during user registration, and set up its role hierarchy.

In the hierarchy, the child roles include the delivered PSC Registered Public User role as well as the additional roles that you created for permit access.

 **Note:** Do not use the delivered PSC Registered Public User as your single role for registered public users. This role does not provide access to permit-related functionality.

2. Use the Public User Roles page to identify the role to be assigned during user registration.

Identifying the Single Role to be Assigned During Public User Registration

To identify the single role to be assigned during public user registration:


1. Select **Common Setup > Public User Roles**.
2. If the Public User Roles page already lists a role, delete it before you add the new role.

The button for adding a role is hidden if a row already exists. You cannot modify the existing row, so you must instead delete it and then add a new one.

To delete the existing row:

- a. Click the row to access the Role Details page.
 - b. Click **Delete**.
3. On the Public User Roles page, click **Add**.
 4. On the Role Details page, use the **Role ID** field to select the single role to be assigned during the public user registration process.

The Role ID is the only enterable field on the Role Details page. To select a role based on the descriptive role name rather than the numerical role ID, use the prompt button for the **Role ID** field, then expand the Search Criteria section of the lookup page so you can search by role name.

 **Note:** If you correctly followed the instructions for creating the single role to be assigned to registered public users, the role name is PSC Custom Registered Public User and the role code is CUSTOM_PSC_REGISTERED_PUBLIC_USER.

5. Click **Save**.

Setting Up Terms of Use


The Terms of Use page stores rules and guidelines to which user must agree as a condition of using a service. The terms act as a legal contract. They are also known as Terms and Conditions or Terms of Service. When you set up a terms of use definition, you also specify the contexts where the definition is available. For example, you can specify that certain terms can be used for public user registration but not for permit applications or planning and zoning applications.


You add, modify, and delete terms of use definitions on the Terms of Use page.

This example illustrates the Terms of Use Details page.

Terms of Use Details

* Terms of Use ID







* Effective Start Date 

Effective End Date 

* Description

Usage Permits
 Planning and Zoning
 Registration

*Content Keyboard users can place the cursor in the text editor and press Alt + 0 to access keyboard shortcut instructions.

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Adding Terms of Use

1. Select **Common Setup > Terms of Use**.
2. On the Terms of Use page, click **Add**.
3. On the Terms of Use Details page, enter values for the following fields.

Page Element	Description
Terms of Use ID	<p>Enter an identifier for the terms of use definition.</p> <p>If a definition changes over time, create multiple definitions with the same ID and new effective dates. The effective dates of the different versions must not have gaps or overlap.</p>
Effective Start Date	<p>Enter the first day that the definition is valid.</p>
Effective End Date	<p>Enter the date, if any, when the definition will no longer be valid. To keep the definition valid indefinitely, do not enter a date. If no date is specified, the field displays the text Open end date.</p> <p>After a definition is saved, the end date becomes read-only. Although you can't make manual changes, the system can still update the end date to accommodate new effective-dated entries. For example, if the currently effective definition has an open end date, and you create a new definition with a later start date, the original definition's end date changes to the day before the new definition goes into effect.</p>
Show All Dates	<p>Click this button to access the effective-dated history of the definition. This button is not available during the creation of a new definition.</p> <p>On the page that displays this history, use the Add button to add a new effective-dated entry for the definition. The new entry inherits the same Terms of Use ID. You provide the new effective start date and other details for the definition.</p>

Page Element	Description
	The system provides logic to prevent gaps or overlaps in the effective-dated history.
Description	Enter a description of the terms of use. This is not part of the Terms of Use text that public users see.
Usage	<p>Select the Permits check box to make this terms of use definition available for permits applications. This option makes the definition available to the Terms of Use ID field on the Permit Type page. Note that it is also necessary to add the Terms of Use element to the permit form.</p> <p>Select the Planning and Zoning check box to make this terms of use definition available for planning applications. This option makes the definition available to the Terms of Use ID field on the Planning Application Type page. Note that it is also necessary to add the Terms of Use element to the planning application form.</p> <p>Select the Registration check box to make this terms of use available for registration functionality. This option makes the definition available to the Terms of Use ID field on the Public User Setup page. See Setting Up Public Users.</p> <p>You must select at least one check box.</p>
Content	Enter and format the detailed content of the terms to which a user must agree. This is the text that users see when they are asked to agree to the terms.

4. Click **Save**.

Modifying Terms of Use

1. Select **Common Setup > Terms of Use**.
2. Click a row on the Terms of Use page.
3. On the Terms of Use Details page, you can update the description, usage and content.
4. Click **Save**.

Managing Effective-Dated Terms of Use Definitions

This example illustrates the Terms of Use Details modal page that displays the effective-dated history of a terms of use definition.

Terms of Use Details x

▲ Common Data

Terms of Use ID Reg Terms

▲ History Data

+ i 📅

Effective Start Date	Effective End Date	Description	Permits	Planning and Zoning	Registration	Content
2/1/19	Open end date	Registration terms and conditions updated Feb 2019	N	N	Y	🗑️ >
1/1/19	1/31/19	Registration terms and conditions	N	N	Y	🗑️ >

Page 1 of 1 (1-2 of 2 items) | K < 1 > X

1. Select **Common Setup > Terms of Use** .
2. Click a row on the Terms of Use page to open the Terms of Use Details page.

3. Click the **Show All Dates** button to view the effective-dated history of the definition you opened.
4. Expand the **Common Data** section to see the **Terms of Use ID**.
5. Expand the **History** section to see a list of all versions of this terms of use definition. Click a history row to open the Terms of Use Details page for the specific row.
6. Click the **Add** button in the **History** section to create a new version of the definition. In the new definition, you can modify any of the data except for the Terms of Use ID. An error message appears if the new effective dates create gaps or overlaps in the definition history.

Deleting Terms of Use

1. Select **Common Setup > Terms of Use**.
2. Click a row on the Terms of Use page.
3. On the Terms of Use Details page, click **Delete**. You are prompted to confirm the permanent deletion.

Delivered Communication Events

Oracle Public Sector Community Development delivers a robust registry of communication events that are triggered by transactions and processes within the application. You can view a list of communication events in this topic.

Ad Hoc Communication Resource

Event Name	Communication Description
Ad Hoc Communication Event	An ad hoc email or notification was sent.

For more information on ad hoc communications, see [Working with Application Communications](#).

Communication Record Details

Event Name	Communication Description
Web Form Response	Notifies agency staff that an applicant responded to a web form questionnaire.

For more information on web form questionnaires, see [Working with Application Communications](#).

Fee Communications

Event Name	Communication Description
New Fees Due	When agency staff manually adds a new fee, the applicant receives a notification that new fees have been assessed and are due.

For more information on manually adding a fee item, see [Working with Fees and Payments](#).

Generic Alert Resource

Event Name	Communication Description
General Alerts	Text was created to appear in the banner of the Agency Springboard or the landing pages for anonymous and registered users.

For more information about generic alerts, see [Defining Alerts](#).

Inspection Communications

Event Name	Communication Description
Final Inspection Passed	<p>When an inspector submits the final inspection for a permit with a passing result, the permit technician or applicant receives a notification.</p> <p>For more information about performing inspections, see Oracle Inspector Overview.</p>
Inspection Canceled	<p>When the applicant or agency staff cancel an inspection, the applicant, inspection contact, inspector, and inspection supervisor can receive a notification.</p> <p>For more information, see Managing Inspections for an Agency and Managing Inspections for a Permit.</p>
Inspection Complete	<p>When the inspector completes any inspection and submits the inspection results, the applicant or agency staff receive a notification that the inspection is complete, regardless of the inspection result. A notification is also sent when inspections are updated from Scheduled to Completed.</p> <p>For more information about performing inspections, see Oracle Inspector Overview.</p>
Inspection ETA Updated	<p>When the inspector updates the estimated time of arrival to an inspection site for a scheduled inspection, the contact at the inspection location receives a notification.</p> <p>For more information about performing inspections, see Oracle Inspector Overview.</p>
Inspection Requested	<p>The system can automatically create an email notification to the permit technician when an inspection request has been created.</p> <p>For more information about requesting inspections, see Requesting Inspections.</p>
Inspection Rescheduled	<p>When the applicant or agency staff reschedule an inspection, the applicant, inspection contact, inspector, and inspection supervisor can receive a notification.</p> <p>For more information about rescheduling an inspection, see Assigning Inspections Using the Supervisor Calendar and Requesting Inspections.</p>
Inspection Scheduled	<p>The system can automatically create an email notification to the inspector and inspection contact when the inspection has been scheduled and assigned to the inspector.</p> <p>For more information about assigning an inspection, see Assigning Inspections Using the Supervisor Calendar.</p>

Event Name	Communication Description
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Oracle Policy Automation Anonymous Results

Event Name	Communication Description
Anonymous Results Save	The anonymous public user receives an email with the results of recommended permits after submitting the permit guide questionnaire.

For more information about the Permit Guide for anonymous public users, see [Setting Up the Landing Page for Anonymous Users](#).

Payment History Resource

Event Name	Communication Description
Payment Received	A successful payment triggers a notification configured using an email template.

Permits Workflow Communications

Event Name	Communication Description
Workflow 001	These delivered events are not associated with specific actions in the Public Sector system. Instead, they are generic events that are delivered for use with workflow. For example, you can use these events when configuring workflow to send notifications related to permit status changes.
Workflow 002	
Workflow 003	When you set up workflow in the Oracle Integration Cloud, you implement notifications by creating a workflow event that sends an event name, template name, and permit ID to the communications center. The communication center then takes care of sending the notification.
Workflow 004	
Workflow 005	

See [Setting Up Process Definitions for Workflow](#).

Plan Review Communications

The following events are provided for plan reviews:

Event Name	Communication Description
Plan Reviewers Completed a Review Cycle	The plan check coordinator receives a notification when all plan reviewers complete their reviews.
Plan Review Completed	The applicant receives a notification with the outcome of the plan review plan coordinator cancels the review cycle or the plan review cycle is closed.

For more information about plan review communications, see [Managing Plan Review Cycles](#).

User Profile Notifications

The User Profile Notifications resource provides the following events.

Event Name	Communication Description
User Account Information Changed	Notifies a public user when the user's account is updated by agency personnel.
Contractor License Verification Failed	Notifies a public user that the contractor's license could not be verified.
Contractor License Verification Pending	Notifies a public user that the contractor's license verification is pending.
Contractor License Verification Passed	Notifies a public user that the contractor's license has been verified.
Law Enforcement Verification Failed	Notifies a public user that their status as a member of law enforcement or a judicial agency could not be verified.
Law Enforcement Verification Pending	Notifies a public user that verification for being a member of law enforcement or a judicial agency is pending.
Law Enforcement Verification Passed	Notifies a public user that verification for being a member of law enforcement or a judicial agency is complete.
License Verification Failed	Notifies a public user that the license could not be verified.
License Verification Pending	Notifies a public user that the license verification is pending.
License Verification Passed	Notifies a public user that the license has been verified.
Welcome Business Profile	Sends a welcome notification and instructions to a permit applicant who creates a new business profile.
User Profile Information Changed	Notifies a public user when the user's profile is updated by agency personnel.
Welcome Personal Profile	Sends a welcome notification and instructions to a permit applicant who creates a new personal profile.

User Trust Account Notifications

The User Trust Account Notifications resource provides the following events.

Event Name	Communication Description
Trust Account Verification Failed	Notifies a public user that the trust account could not be verified.
Trust Account Verification Pending	Notifies a public user that the trust account verification is pending.

Event Name	Communication Description
Trust Account Verification Passed	Notifies a public user that the trust account has been verified.

See [Verifying Public User Information](#).

Setting Up Communication Events



Communication events trigger delivery of different communication types to various users. The agency defines the content and recipients using communication templates.





Agency users add, modify, and delete communication templates on the Communication Event Details page.

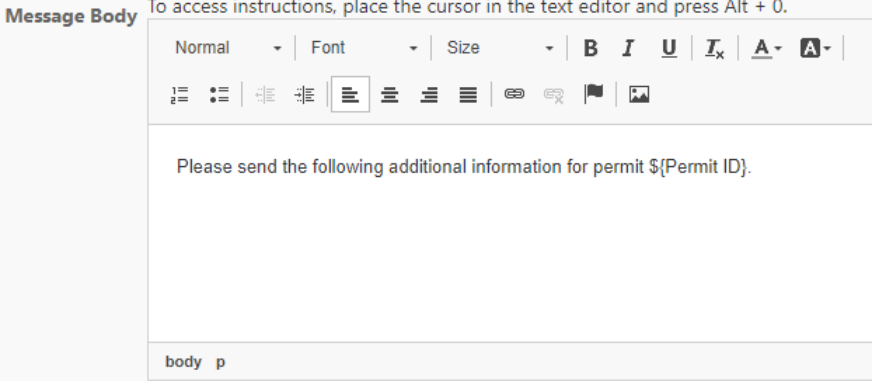


The communication events themselves are delivered with Oracle Public Sector Community Development. For a list of the available communication events, see [Delivered Communication Events](#).

Adding Communication Templates

1. Select **Communication Center > Events** in the navigator.
2. Click the row on the Communication Event page for which you want to add a template.
3. On the Communication Event Details page, click **Add** in the Communication Template grid.
4. On the Communication Template Details page, enter values for the following fields:

Page Elements	Definition
Code	Enter a unique identifier code for the communication template.
	<p> Note: To make the code unique, Oracle recommends that you create it using a portion of the communication event name. For example, you might use SUB01 for the email template of the Application Submit communication event. This is because communication template codes must be unique across all communication events. If you create a communication template for one event that has the same code as a template for another event, you will receive an error when you try to save it.</p>
Name	Enter a name for the communication template.
Channel Type	Specify the type of communication that this template generates. Values are: <ul style="list-style-type: none"> o Alert: Generates text that is displayed to users when they log in to the application. o Email: Generates an email that is sent to users. o Notification: Generates a notification that appears when users click the notification icon in the application.
	<p> Note: The fields that are available to define on this page vary depending on the channel type that you select.</p>

Page Elements	Definition
<p>Visibility</p>	<p>Select which type of user can see this communication. Values are:</p> <ul style="list-style-type: none"> <input type="radio"/> Account owner <input type="radio"/> Public user <input type="radio"/> Agency staff only
<p>Enabled</p>	<p>Turn this switch on to activate the communication template. When this switch is turned off, the application does not generate the communication when the associated event is triggered.</p>
<p>Start Date Time and End Date Time</p>	<p>Enter the time period for which the alert is displayed.</p> <p> Note: These fields appear only for the Alert channel type.</p>
<p>MIME Type (Multipurpose Internet Mail Extensions type)</p>	<p>Select the format of the email that this communication template generates. Values are:</p> <ul style="list-style-type: none"> <input type="radio"/> HTML <input type="radio"/> Text <p> Note: This field appears only for the Email channel type.</p>
<p>Notification Priority</p>	<p>Turn this switch on to display notifications generated by this communication template at the top of the notification list.</p> <p> Note: This field appears only for the Notification channel type.</p>
<p>User Can Delete</p>	<p>Turn this switch on to enable users to delete notifications generated by this communication template from their notification lists.</p> <p> Note: This field appears only for the Notification channel type.</p>
<p>Select and Insert</p>	<p>These fields enable you to insert variable attributes into your communications. You select the field and the attribute that you want to insert in that field, and click Insert to enter a variable for that attribute.</p> <div data-bbox="651 1696 1511 1770" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> Select <input type="text" value="Body"/> ▼ <input type="text" value="Permit ID"/> ▼ <input type="button" value="Insert"/> </div> <p>For example, if you select the Body field and the Permit ID attribute, and click Insert, the <code>\${Permit ID}</code> variable is inserted into the Message Body field of the communication template.</p>

Page Elements	Definition
	<p>Message Body To access instructions, place the cursor in the text editor and press Alt + 0.</p>  <p>Whenever the application generates a communication using this template, it inserts the permit ID that is associated with the triggered communication event into the body text.</p>
Remarks	Enter any additional information about the communication template. These remarks are not included in the generated communication.
From	Enter the email address of the person or organization who is sending the generated email.
To	<p>Enter the email addresses or user IDs of the people or organizations that you want to receive the communication.</p> <p> Note: Enter email addresses for the Email channel type, and user IDs for the Alert and Notification channel types.</p>
Cc and Bcc	<p>Enter the email addresses of the people or organizations that you want to receive a copy or blind copy of the communication.</p> <p> Note: These fields appear only for the Email channel type.</p>
Subject	<p>Enter a brief description of the purpose and content of the communication.</p> <p> Note: This field appears only for the Email and Notification channel types.</p>
Message Body	<p>Enter the main body text of the communication.</p> <p>For the Alert channel type, and the Email channel type with the Text MIME type, you can enter only plain, unformatted text.</p> <p>You can enter rich text, links, and images for the Notification channel type and the Email channel type with the HTML MIME type.</p>

5. Click **Save**.

Modifying Communication Templates

1. Select **Communication Center > Events** .
2. Click the row on the Communication Event page for which you want to modify a template.
3. Click the row in the Communication Template grid that you want to modify.
4. On the Communication Template Details page you can:
 - o Click **Clone** to create a copy of the communication template.
 - o Update the communication template field values.

 **Note:** You cannot edit the **Code** or **Channel Type** fields.

5. Click **Save**.

Deleting Communication Templates

1. Select **Communication Center > Events** .
2. Click the row on the Communication Event page for which you want to delete templates.
3. Click **Edit** in the Communication Template grid.
4. Select the check boxes next to all of the communication templates that you want to delete.
5. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Reports

The report parameters that you define on the Report Configuration pages filter the data that is generated for the reports. You can use delivered or provide customized reports.

Oracle Public Sector Community Development delivers these reports:

Report ID	Report Name	Description
Inspection001	Inspection Summary	The inspection summary provides information about the inspection result and lists the items that failed inspection.
DepositSlip001	Deposit Slip	This report is initiated from the Print Deposit Slip page and lists deposit information.
Receipt001	Payment Receipt	This report is initiated from the fees and payments page in the permit details and lists payment receipt information.
Invoice001	Payment Invoice	This report displays invoice information and is initiated from the fees and payments page in the permit details.

Report ID	Report Name	Description
Permit001	Building Permit	<p>This is a sample building permit, which is usually posted at the construction site. The building permit provides approval to proceed with the construction or remodeling project on the property.</p> <p>The building permit is generated from permit details and initiated on the permit overview page.</p>

You add, modify, and delete report parameters on the Report Configuration Details page. You can also create your own reports in Oracle BI Publisher and allow users to access them through the **View Reports** buttons in the permits pages.

For more information on modifying and creating analytics and reports, see [Creating and Administering Analytics and Reports](#).

Adding Report Parameters

1. Select **Common Setup > Report Configuration**.
2. Click the report row on the Report Configuration page for which you want to add a parameter.
3. On the Report Configuration Details page, click **Add** in the Parameters grid.
4. Enter values for the following fields:

Page Elements	Definition
Parameter ID and Parameter Name	Enter a unique ID and name for the report parameter.
Parameter Data Type	Enter the data type for the report parameter.
Control Object and Control Name	Enter a field from which the report receives data along with a name for that field.

5. Click **Save**.

Modifying Report Parameters

1. Select **Common Setup > Report Configuration**.
2. Click the report row on the Report Configuration page for which you want to modify a parameter.
3. Click the row in the Parameters grid that you want to modify.
4. You can:
 - o Update the report parameter field values.
 - o Delete the report parameter. You will be prompted to confirm the permanent deletion.
5. Click **Save**.

Deleting Report Parameters

1. Select **Common Setup > Report Configuration**.
2. Click a row on the Report Configuration page.
3. Click **Edit** in the Parameters grid.

4. Select the check boxes next to all of the report parameters that you want to delete.
5. Click **Delete**. You will be prompted to confirm the permanent deletion.

Updating the Report Path

1. Select **Common Setup > Report Configuration**.
2. Click the report row on the Report Configuration page for which you want to modify the report path.
3. On the Report Configuration Details page, enter a path to the desired BI Publisher report.
4. Click **Save**.

Setting Up Document Categories and Subcategories

You set up document categories and subcategories on the Document Category pages to organize the various types of attachment files.

This example illustrates the Document Category Details page, which is described in the following text.

Document Category Details Cancel Delete Save

* Category ID Initialization

* Category Project Initialization

* Description Project Initialization

Enabled

Document Subcategory

☰ + ↓ Search 🔍

Subcategory ID	Subcategory	Description	Enabled
Initialization Approved	Initialization Approved	Project Initialization Approved	Yes >
Project Charter	Project Charter	Project Charter	Yes >

Adding Document Categories and Subcategories

1. Select **Common Setup > Document Category**.
2. On the Document Category page, click **Add** to add a new document category.
3. Enter values on the Document Category Details page:

Page Element	Description
Category ID	Enter an identifier for the category.
Category	Enter a name for the category.
Description	Enter a description of the category.
Enabled	Turn the switch on to make the category available for use. The category is disabled by default.

4. Click **Save**.
5. If you want to add a subcategory, click **Add** in the **Document Subcategory** section.
6. On the Document Subcategory Details page, enter an ID, name, and description for the subcategory.

7. Click **Save**.

Modifying Document Categories and Subcategories

1. Select **Common Setup > Document Category** .
2. On the Document Category page, select the row for the category that you want to modify.
3. On the Document Category Details page, you can modify the category name and description, and turn the **Enabled** switch on or off.
4. Click **Save** to save any changes.
5. To modify a document subcategory:
 - a. Select the associated category to open the Document Category Details page.
 - b. Select the subcategory that you want to modify.
 - c. On the Document Subcategory Details page, you can change the subcategory name and description, and turn the **Enabled** switch on or off.
 - d. Click **Save**.

Deleting Document Categories and Subcategories

1. Select **Common Setup > Document Category** .
2. On the Document Category page, select the row for the category that you want to delete.
3. If you want to delete the document category, click **Delete** on the Document Category Details page.

 **Note:** When you delete a document category, all associated subcategories are also deleted.

4. If you want to delete multiple document categories, you can delete them on the Document Category page:
 - a. Click **Edit**.
 - b. Select the check boxes for the document category rows to delete.
 - c. Click **Delete**.
5. To delete the document subcategory, click **Delete** on the Document Subcategory Details page.
6. If you want to delete multiple subcategories, you can delete them from the Document Category Details page using the **Edit** and **Delete** buttons.

Setting Up Document Groups

You set up document groups using the Document Group pages to organize the various categories of attachment files into a grouping.

This example illustrates the Document Group Details page, which is described in the following text.

Document Group Details Cancel Delete Save

* Group ID ZPER-DOCGRPID1 Enabled

* Group ZPER-DOCGRP1 * Description Document Group1

Document Category

Category ID	Category	Description	Enabled	Actions
BLUEPRINT	BLUEPRINT	Drawings blueprints and layouts	<input checked="" type="checkbox"/>	+ -
Forms_1548829255279	Blueprints	Application form	<input checked="" type="checkbox"/>	+ -

Adding Document Groups

1. Select **Common Setup > Document Group** .
2. On the Document Group page, click **Add** to add a new document group.
3. Enter values on the Document Group Details page:

Page Element	Description
Group ID	Enter an identifier for the group.
Group	Enter a name for the group.
Description	Enter a description of the group.
Enabled	Turn the switch on to make the group available for use. The group is disabled by default.

4. Click **Save**.
5. Add document categories that make up the grouping by clicking **Add** in the **Document Category** section.
6. Enter a document category ID or use the lookup prompt to find a category ID.

If desired, you can click the **Document Category** link to research which category to choose. For more information about document categories, see [Setting Up Document Categories and Subcategories](#).

7. Click **Save**.

Modifying Document Groups

1. Select **Common Setup > Document Group** .
2. On the Document Group page, select the row for the group that you want to modify.
3. On the Document Group Details page, you can modify the group name and description, and turn the **Enabled** switch on or off.
4. Click **Save** to save any changes.
5. You add or remove document categories from the group in the **Document Category** section.

To modify a document category, you must go to the Document Category definition pages. See [Setting Up Document Categories and Subcategories](#).

Deleting Document Groups

1. Select **Common Setup > Document Group** .

2. On the Document Group page, select the row for the group that you want to delete.
3. Click **Delete** on the Document Group Details page.
4. If you want to delete multiple document groups, you can delete them on the Document Group page:
 - a. Click **Edit**.
 - b. Select the check boxes for the document group rows to delete.
 - c. Click **Delete**.
5. To delete a document category from the group, click the **Delete** icon for the document category row in the **Document Category** section.

Setting Up Dashboards

You add, modify, and delete dashboard configurations on the Dashboard Configurations page.

Adding a Dashboard Configuration

1. Select **Common Setup > Dashboard Configuration**.
2. On the Dashboard Configuration page, click **Add**.
3. On the Dashboard Configuration Details page, enter values for the following fields:

Page Element	Description
Dashboard ID	Enter a unique name for the dashboard.
Description	Enter a description of the dashboard
Path	Enter the Oracle Business Intelligence (BI) Catalog portal path for the dashboard. For example the portal path for the Permits dashboard is %2Fshared%2FPublic%20Sector%2F_portal%2FPublic%20Sector&page=Permits.
Enabled	Turn on this switch to activate this dashboard.
Default	Turn on this switch to make this the default dashboard.




Note:

Only one dashboard can be designated as the default.

4. Click **Save**.

Modifying a Dashboard Configuration

1. Select **Common Setup > Dashboard Configuration**.
2. Click a row on the Dashboard Configuration page.
3. On the Dashboard Configuration Details page you can:
 - o Update the dashboard configuration field values.

 **Note:** You cannot edit the **Dashboard ID**.

- Delete the dashboard configuration. You will be prompted to confirm the permanent deletion.

4. Click **Save**.

Deleting Dashboard Configurations

1. Select **Common Setup > Dashboard Configuration**.
2. Click **Edit**.
3. Select the check boxes next to all the dashboard configurations that you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Setting Up Lookups

This topic describes how to add and change values that appear in lookup lists. Lookup lists are referenced by various fields in the application that display a static set of values from which the end user can select a value.

Lookup Types and Lookup Values Overview

Lookup types in applications are used to represent a set of codes and their translated meanings. To the end users, a lookup type displays a list of values from which they select values.

You use the Lookup Types page to access lookup types, and you use the Lookup Type Details page to modify lookup types, add lookup values, and add lookup types, where authorized.

When working with lookups, you deal with lookup types and lookup values.

Lookup Element	Description
Lookup Type	A lookup type is a static list of values users view to make entries in the application. The application references a lookup type to display its list of values.
Lookup Value	A lookup value is a single item contained within a lookup type. For example, Paid is a lookup value for the Fee Status lookup type. Lookup types typically contain numerous lookup values.

Lookup types are delivered as seed data for your service. You can only modify selected lookup types, such as Business Type, UOM Type, Standard Code Type, and so on. Most lookup types are read-only.

Modifying Lookup Types

Lookup Type

Lookup Type	Meaning	Application	Module	Configuration Level	
ORA_PSC_PER_INS_CONTACT	Contact method	Permits	Permit Inspections	Extension	>
ORA_PSC_PER_INS_SIG	Inspector Signature Option	Permits	Permit Inspection Setup	System	>
ORA_PSC_PER_INS_SYS_STATUS	Inspection System Status	Permits	Permit Inspection Setup	System	>
ORA_PSC_PER_ORIGINATOR	Record Originator	Permits	Application Intake	System	>
ORA_PSC_PER_OWNER_SIG	Owner Signature Option	Permits	Permit Inspection Setup	System	>
ORA_PSC_PER_PUB_USER_ENABLED	Public User Enabled	Permits	Application Intake	System	>
ORA_PSC_PER_RECORD_STATE	Record State	Permits	Application Intake	System	>
ORA_PSC_PER_REC_SYS_STATUS	Record System Status	Permits	Permit Setup	System	>

Page of 8 (9-16 of 62 items) | K < 1 3 4 5 ... 8 > X | Show ▼

To modify a lookup type:

1. Select **Common Setup > Lookups**.
2. On the Lookup Types page use the Search box to filter the lookup types by keyword.

For example, to view the Business Type lookup type, enter business in the Search box.

3. Click on the row for the lookup type you want to view.
4. View the contents of the Lookup Type Details page.

Page Element	Description
Lookup Type	Identifies the lookup type within the application.
Application	Identifies the application that uses the lookup type. For example, Permits, Common Components, and so on.
Meaning	The actual UI display name used to represent the list of values contained in the lookup type.
Configuration Level	Indicates at what level the lookup can be modified. Options are: <ul style="list-style-type: none"> ○ System: Only Oracle development teams can modify lookup types at this configuration level. ○ Extension: Customers can perform minimal tasks, such as add lookup values. ○ User: Customers can add lookup values, delete lookup values, update the meaning, and update the description.
Module	The internal application module using the lookup type, such as Billing Entry, Billing Setup, and so on.
Description	Identifies the purpose and use of the lookup type.

5. If you need to add lookup values, refer to the following section for steps for that task.
6. Click **Cancel** to close the lookup type, or click **Save** if you made any changes.

Adding Lookup Values

Lookup Value Details

* Lookup Code

Display Sequence ▼ ▲

Enabled

Start Date 📅

End Date 📅

* Meaning

Description

Tag

Cancel
Save

You can add lookup values to lookup types with a configuration level set to User or Extension.

To add lookup values:

1. Select **Common Setup > Lookups**.
2. On the Lookup Types page use the Search box to filter the lookup types by keyword. For example, to view the Business Type lookup type, enter business in the Search box.
3. Click on the row for the lookup type you want to view.
4. On the Lookup Type Details page, click **Add** under Lookup Value Type.
5. On the Lookup Value Details page, enter these values:

Page Element	Description
Lookup Code	An internal application code for each lookup value that is not visible to users. It is typically a shorter, less user-friendly representation of the item. For example, ORA_DRIVER_LIC for State Driver's License, or LEN for Length, if listing units of measurement.
Display Sequence	Control in what sequence the lookup value appears in the list displayed to users, where 2 appears above 3. If you do not specify a sequence, the application displays the items in the order they were entered.

Page Element	Description
Enabled	Turn on to make a lookup value active. If a lookup value is not enabled, then the application does not display it to the end user in the list of values for that lookup type.
Start Date	Set a start date for the lookup value to become active. Even if the lookup value is enabled, if a start date is set, the application does not display the lookup value until the start date is reached.
End Date	Set an end date for a lookup value to no longer be displayed in a list of values.
Meaning	The display name for the lookup value. End users see this value in the list of values displayed at run time. They do not see the Lookup Code value.
Description	Provide any additional information to help identify the purpose of the lookup value or clarification regarding what it represents.
Tag	Tags allow you to add a label to your lookup codes. A tag can be used to categorize lookups based on facilitating searches or guiding how a lookup should be used.

6. Click **Save**.

Working with Configuration Levels

The configuration level attribute determines who can modify a lookup type and what can be modified. The configuration levels are:

- System: Only Oracle development teams can modify lookup types at this configuration level.
- Extension: Customers can perform minimal tasks, such as add lookup values.
- User: Customers can add lookup values, delete lookup values, update the meaning, and update the description.

Task	User	Extension	System
Add a lookup type	Yes	No	No
Delete a lookup type	Yes	No	No
Modify lookup type meaning	Yes	No	No
Modify lookup type description	Yes	No	No
Add lookup values	Yes	Yes	No
Delete lookup values	Yes (if you created it)	Yes (if you created it)	No
Modify lookup value attributes	Yes (except for Lookup Code)	Yes (if you created it, and except for Lookup Code)	No


Adding Lookup Types

To add a lookup type:

1. Select **Common Setup > Lookups.**
2. On the Lookup Types page click **Add** for the Lookup Type grid.
3. On the Lookup Type Details page, enter these values:
 - o Lookup Type (The value you enter must be uppercase and cannot begin with the prefix ORA_, which is used to distinguish your custom lookup types from delivered lookup types.)
 - o Meaning
 - o Module
 - o Description
4. Click **Add** for the Lookup Value grid for each lookup value you need to add to the lookup type.
5. Click **Save.**

Setting Up Data Format Exchange Maps


The Data Format Exchange utility is a data-mapping utility that enables you to map fields between source and target locations.


 **Note:** This utility is useful in situations where data must be exported from or imported to Public Sector Compliance and Regulation. Currently, this utility is only used by the Export Journals to ERP process.

Business analysts create and modify Data Format Exchange maps on the Data Format Exchange page.

Adding a Data Format Exchange Map

1. Select **Common Setup > Data Format Exchange .**
2. On the Data Format Exchange page, click **Add.**
3. For the Definition step, enter values for the following fields:


Page Element	Description
Mapping Name and Description	Enter a name and description for the data mapping.
Source Type	Select the type of source format to be included in the data mapping.
 Note: Currently, VO is the only valid value for this field.	
Target Type	Select the type of target format to be included in the data mapping.

Page Element	Description
	 Note: Currently, CSV is the only valid value for this field.
Enabled	Turn this switch on to make the data mapping available to select in the Mapping Name field on the Export Journals to ERP page. For more information on exporting journals, see Exporting Journal Entries .


4. Click **Next**.
5. For the Source step, enter values for the following fields:

Page Element	Description
Source Name	Selects the source view to be included in the data mapping, such as Journals to Export.

6. Click **Next**.
7. For the Target step, click **Upload** to select a file that will be updated with the results of the field mapping.
8. Click **Next**.
9. For the Mapping step, enter values for the following fields:

Page Element	Description
Target Field	Displays each field in the target format.
Source Field	Select the source field that you want to map to each target field.
Transform	Select an option to modify the value for the target field.
	 Note: Currently, Constant is the only valid value for this field.
Transform Parameter	Specify the parameter used to determine the value for the target field. For example, if the target field is Effective Date and the Transform value is Constant, the Transform Parameter might be 01/01/2018.


10. Click **Submit** to save the Data Format Exchange map.

 **Note:** At any point during the process, you can click **Previous** to go back one step. You can also click **Cancel** to exit the data mapping setup process and discard your changes.

Modifying a Data Format Exchange Map

1. Select **Common Setup > Data Format Exchange**.
2. Select a mapping on the Data Format Exchange page.

3. For the Definition step, you can enable or disable the data mapping.
4. Click **Next**.
5. You can't update any fields in the Source step.
6. Click **Next**.
7. For the Target step, you can click the file link to download a copy of the file.
8. Click **Next**.
9. For the Mapping step, you can update the values of the **Source Field**, **Transform**, and **Transform Parameter** fields.
10. Click **Submit** to save your changes to the Data Format Exchange map.


 **Note:** At any point during the process, you can click **Previous** to go back one step. You can also click **Cancel** to exit the data mapping update process and discard your changes.

2 Setting Up Your Agency Staff

Setting Up a Fusion Business Unit and Legal Entity

This topic discusses the **one-time setup** for Public Sector Compliance and Regulation administrators who are not using Fusion Human Capital Management (HCM), Enterprise Resource Planning (ERP), and Sales Cloud.

The following setup steps are prerequisites for creating an agency staff in the system.

 **Note:** For Fusion HCM, ERP, and Sales Cloud customers, these steps are not required as the business unit and legal entity are already set up.

Configure the following tasks in the order mentioned here:

1. Set up reference data sets (to create a Set ID)
2. Create a business unit
3. Create a legal address
4. Create a Legislative Data Group
5. Create a Legal Entity
6. Register a Legal Entity
7. Create Legal Entity HCM Information

Setting up Reference Data Sets

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel locate the Manage Reference Data Sets task and click the row to open the Manage Reference Data Sets page.
3. On the Manage Reference Data Sets page, click the **New** button and include values for the fields:

Page Element	Description
Set Code	Enter a code value that represents your agency.
Set Name	Enter a name that represents your agency.
Description	Enter a description about your agency.

4. Click **Save and Close** to save the newly created SetID.

Creating a Business Unit

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel locate the Manage Business Units task and click the row to open the Manage Business Units page.
3. On the Manage Business Unit page, click the **New** button and include values for the fields:

Page Element	Description
Name	Enter a name for the business unit.
Default Set	Select the SetID you created in the previous section

4. Click **Save and Close** to save the newly created business unit.

Creating a Legal Address

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel, locate the Manage Legal Addresses task and click the row to open the Manage Legal Addresses page.
3. On the Manage Legal Addresses page, click the New button and enter the agency address in the Agency Line 1 field. The other fields are optional.
4. Click **OK** to return to the Manage Legal Addresses page and click **Save and Close** to save the newly created address.



Creating a Legislative Data Group

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel, select the task named Manage Legislative Data Group and click **Select** to open the Manage Legislative Data Groups page.
3. On the Manage Legislative Data Groups page, click **Create** to enter the new legislative data group details.
4. Enter your legislative data group name in the Name field. Search and select your country from the Country field.
5. Click **Submit** to save and return to the Manage Legislative Data Group page.
6. Click **Done**.

Creating a Legal Entity

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel, locate the task named Manage Legal Entity and click to open the Select Scope page.
3. On the Select Scope page select the Manage Legal Entity task radio button.
4. Click the Legal Entity drop-down and select **Create New**. Click **Apply and Go to Task** button to open the manage Legal Entities page.
5. On the Manage Legal Entities page, click the **New** button to open the Create Legal Entity page and enter values for the fields:

Page Element	Description
Country	Select the country (United States is the default selection)
Name	Enter the name of your agency
Legal Entity Identifier	Enter a code for your agency

Page Element	Description
Payroll Statutory Unit	Select the checkbox
Legal Employer	Select the checkbox
Legal Address	Select the legal address (created in the previous section) using the Search and Select page.
EIN or TIN	Enter your agency's EIN or TIN value. You can enter a value of your choice if you do not have EIN or TIN for your agency.
	<p> Note: If you are using Fusion HCM or Fusion ERP, the value you enter here must be legitimate. It is recommended that you refer to Fusion documentation to know about the required value for entry in the field.</p>
Legal Reporting Unit Registration Number	Enter your agency's legal reporting unit registration number. You can enter a value of your choice if you do not have a registered number for your agency.
	<p> Note: If you are using Fusion HCM or Fusion ERP, the value you enter here must be legitimate. It is recommended that you refer to Fusion documentation to know about the required value for entry in the field.</p>

6. Click **Save and Close** to save the newly created legal entity.

Registering a Legal Entity

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel, select the task named Manage Legal Entity Registration and click **Select** to open the Select Scope page.
3. On the Select Scope page select the Manage Legal Entity Registrations task radio button.
4. Click the Legal Entity drop-down and choose Select and Add. Select Click Apply and Go to Task button to open the Manage Legal Entities page.
5. On the Manage Legal Entities page expand the Search section and enter the legal entity name you created in the previous section. Click **Search**.
6. Select the row from the search results and click **Save and Close**, to save the entity and open the Manage Registrations page.
7. View your values on the new Manage Registrations page and click **Done** to confirm and complete the registration process.

Creating Legal Entity HCM Information

1. Select the **Setup and Maintenance** tile on the Agency Springboard. On the Setup page, select the offering: Public Sector Permits or Public Sector Planning and Zoning and then select the Agency Staff functional area.
2. On the right panel, select the task named Manage Legal Entity HCM Information and click Select to open the Select Scope page.
3. On the Select Scope page select the Manage Legal Entity HCM Information task radio button.

4. Click the Legal Entity drop-down and choose Select and Add. Click Apply and Go to Task button to open the Manage Legal Entities page.
5. On the Manage Legal Entities page expand the Search section and enter the legislative data group you created in the previous section. Click **Search**.
6. Select the row from the search results and click **Save and Close**, to save the entity and open the Legal Entity page.
7. On the Legal Entity page, click **Edit** and then click **Update** to open the Update Legal Entity page to enter an action reason.
8. On the Update Legal Entity page, select Action Reason drop-down button and select the option Reorganization. Click **OK** to save and return to the Legal Entity page.
9. On the Legal Entity page, select the Payroll Statutory tab to associate the data group to the HCM legal entity.
10. Under the Payroll Statutory Information section select the Associated Legislative Data Group drop-down. Search and select the legislative data group you created using the previous section.
11. Click **OK** to return to the Edit Legal Entity page. Click **Submit** and then click **Done** to complete the creation of a Legal Entity HCM Information.

For information on creating an employee record, refer to the documentation on [Managing Agency Staff Profiles](#).

Defining Job Titles

This topic discusses how to define job titles for agency staff.

Defining Job Titles

Administrators define new job titles using the Job Titles page:

1. Select **Agency Staff > Job Title**.
2. The Job Title page lists all the job titles defined.
3. Click **Details** for a row to open the Job Title Detail page and view and edit the details of the job title.
4. Click **Add** to open the Job Title Detail page and define a new job title.
5. Enter various details and click **Save** to save the new job title and return to the Job Title page.

Setting Up Agency Staff

This topic provides an overview of job functions along with a list of delivered Job Functions, and discusses the how to set up Fusion Business Units and Legal Entities for Public Sector Compliance and Regulation services.

Job Function Overview

Job functions are assignments made to staff members using the Manage Agency Staff page. Job Function helps you in assigning job specific attributes to an agency staff member. For example, you can assign the job function of a Building Inspector to an agency staff member and set up attributes such as Inspector District and Schedule.

Job Function

Section and Usage

Building Inspector

- **Work Schedule** — Inspections: Determine the work schedule of the Inspector.
- **Inspection Districts** — Inspections: Determine the districts an inspector is assigned to.

Job Function	Section and Usage
	<ul style="list-style-type: none"> • Inspection Types — Inspections: Determine if the inspector can be assigned to a given type of inspection. • Permit Types
Business Analyst	<ul style="list-style-type: none"> • Inspection Districts • Inspection Types • Permit Types
Chief Building Officer	<ul style="list-style-type: none"> • Inspection Districts • Inspection Types • Permit Types
Inspector Supervisor	<ul style="list-style-type: none"> • Work Schedule — Inspections: Determine the work schedule of an Inspector supervisor. • Inspection Districts — Inspections : Determine the districts an inspector is assigned to. • Inspection Types • Permit Types
Economic Development Officer	Permit Types
Finance Administrator	<ul style="list-style-type: none"> • Inspection Districts • Inspection Types • Permit Types
Permit Technician	<ul style="list-style-type: none"> • Inspection Districts • Inspection Types • Permit Types
Plan Coordinator	Permit Types
Plan Reviewer	Permit Types — Determine the permit types that this plan reviewer can be assigned to.
Principal Planner	Permit Types
Cashier	<ul style="list-style-type: none"> • Permit Types • Cashier ID — Cashiering: Determine Cashier ID of the Cashier
Planner	<ul style="list-style-type: none"> • Planning Application Types— Determine the application types that this Planner can be assigned to. • Pre-application Meeting Schedule — Determine the availability of the planner for scheduling pre-application meetings.

Setting Up Fusion HCM Business Units and Legal Entities for Public Sector Compliance and Regulation Services

If you are an existing Fusion customer and if you have already set up business units and legal entity, then you can assign the same for your Agency Staff. However, if you are a new Public Sector Compliance and Regulation-only customer then as a

prerequisite for entering Agency Staff data, you need to create one business unit and one legal entity that can be used for your agency staff.

See [Setting Up a Fusion Business Unit and Legal Entity](#)

Configuring Agency Job Groups

This topic provides an overview of the Agency Staff Group Configuration and discuss the procedure to configure agency job groups.

You can use the Agency Staff Groups for identifying a common set of Job attributes that can be applied to a group of Employees.


Groups provide the flexibility to assign attributes at various levels. You can define a group for a given department, division, or for specific districts based on the commonalities of the job attributes.

Examples of Groups are:

1. Inspectors working in District A
2. Permit Technicians responsible for Fence Permits

You can configure a group with default Job Functions and their attribute values for your users.


Users entering their employee profile information can select a group job function, which results in loading default job functions and their attribute values automatically populated.

 **Note:** Users cannot edit the job function attribute values on the Agency Staff page when using the Job Group function.

Configuring Agency Job Groups

Administrators set up and configure the agency staff group on the Job Group page. Agency users can select a group on the Agency Staff Profile page, and a default set of job functions and attribute values are assigned to the employee. To set up the job functions and attributes for a group:

1. Select **Agency Staff** > **Job Group** .
2. On the Job Group page, click **Add** to add a new group or **Edit** to change the group attributes. Click **Add**.
3. Enter the details of the job group on the Job Group Details page.
4. Verify that the **Enabled** switch is turned on if you want to enable this group when you save. This switch is turned on by default for a new group.
5. Under the Job Function section, click **Add** to select job functions and include their attributes.
6. Click **Save** to return to the Job Group page.

 **Note:** Agency users select the group from a list on the Agency Staff page. The job functions and their corresponding attributes cannot be changed by users.

Managing Agency Staff Profiles



This topic discusses how to manage agency staff profiles.

Managing Agency Staff Profile

Administrators set up the agency staff profile on the Agency Staff page. Select Agency Staff.

1. Select **Agency Staff**
2. On the Agency Staff page, click **Add** to add a new agency staff member – employee.
3. On the Agency Staff Profile page, you add values to the various fields. For the Business Unit and the Legal Entity, see the [Setting Up a Fusion Business Unit and Legal Entity](#) section of documentation.

Page Element	Description
Select Existing Fusion Worker	<p>Turn on the switch to allow the search and selection of an existing Fusion employee. The following fields are display only, populating details from Fusion information:</p> <ul style="list-style-type: none"> ○ Person ID ○ Person Number ○ Hire Date ○ Business Unit ○ Legal Entity ○ Generated User Account ○ Send Credential Email ○ User name
Worker ID	<p>Enter an ID or click the prompt to open the Look Up page and search for the Fusion employees. You can sort the search results by any of these:</p> <ul style="list-style-type: none"> ○ Worker ID ○ First Name ○ Last Name ○ Email Address ○ Hire Date ○ Phone Number ○ Business Unit Name ○ Legal Employer ○ Manager Person ID <p>Select an employee row from the search result on the Look Up page and the details are populated on the Agency Staff page.</p>
Person Type	Select a type of staff member from the options: Employee

Page Element	Description
Enabled	<p>Set a status for the staff member from the options:</p> <ul style="list-style-type: none"> ○ Active ○ Inactive <p> Note: You set the status to Inactive when the employee is inactivated in your HR system. If you are a Fusion HCM/ERP/Sales Cloud customer then the inactivation of Employees in HCM will not automatically inactivate the Employee data in Public Sector Cloud. You must manually update this field.</p>
Is a Supervisor	<p>Turn on the switch if the employee is a supervisor.</p>
Job Group	<p>Select a group to assign a job group section with the relevant job functions. Accordingly, the system populates the Job Group Assignments section.</p> <p> Note: You cannot make any changes to the values in the job group assignments on this page. To update the values, navigate to the Job Group page.</p>

4. Click **Save** to save the agency staff profile and return to the Agency Staff page.

Job Function Assignment without using Agency Job Groups

You can assign job functions to employees directly, without having to use Job Groups.


1. On the Agency Staff page search and select the employee that you want to add job functions to.
2. Under the Job Function section, click **Add** to select job functions and include their attributes.
3. Click **Save** and return to the Agency Staff page to view the job function assignments.


To include job functions using Agency Job Groups, see the section [Configuring Agency Job Groups](#).

Assigning Agency Security Access

Administrators assign roles to various staff members. The security roles assigned to an employee determine the navigations and data that the user can access.

1. Select Agency Staff and then select Agency Staff Access. The Agency Staff Access page lists all the agency staff members.
2. You can click the chevron for a row to view the employee access details. This page lists all the security roles assigned to the employee user. You can add new security roles to the employee on this page.
3. Click the **Add New Role** button to open the Role Detail page and assign a role for the user.
4. Click **Save** to save your changes and return to the Agency Staff Access page.
5. Click **Save** to save the changes you made to the Agency Role details of the staff member.
6. You can add or delete the security roles assigned to the user on this page.

-  **Note:** All Agency users must be assigned the **PSC Agency Staff** role. Additionally job specific roles can be assigned to the user. For the complete list of security roles, you can refer to the Security Reference Manual. Also refer to [Using the Security Console](#).

-  **Note:** For users requiring access to Permits, in addition to the **PSC Agency Staff** and job specific roles such as **PSC Permit Technician**, **PSC Plan Reviewer** and others, you must assign the following roles to the users: **CUSTOM_MANAGE_PERMITS**, **CUSTOM_MANAGE_PERMITS**, and **CUSTOM_PSC_MANAGE_PERMITS_AGENCY**.

Importing Agency Staff Data

This topic explains how to prepare and import agency staff resource data from an external data source into Public Sector Agency Staff tables using the File-Based Data Import feature.

Agencies with Fusion HCM implementation: File-based data import can be used if your agency has implemented Fusion HCM. You either enter employee details manually into the Public Sector Agency Staff tables using the PSCR user interface (Agency Staff page) or run the schedule import process to copy the employee data.

Agencies without Fusion HCM implementation: If your agency has not implemented Fusion HCM and you are using a third-party application to maintain employee information, you can use the import process to copy data from the third party tables into the Public Sector Agency Staff tables.

In addition to the removal or inclusion of employee records, data changes can include changes to the details of an employee, such as the address, email, role, or designation.

Scheduling the Employee Data Import and Export Process

Administrators can set up a schedule to process a batch file that imports employee data from a .CSV file into the Public Sector Agency Staff tables. The imported data file, which is usually generated from a third-party application, can be used to set up and periodically update user details within Public Sector Agency Staff.

Using the Predefined Template to Import Data using File-Based Data Import

Public Sector Compliance and Regulation provides a template to help you import data using the File-Based Data Import tool. The Import template is a spreadsheet that includes the commonly used fields, in addition to the required, along with instructions to use them.

You can download the Agency Staff Import Template spreadsheet from [My Oracle Support](#) using the document ID **2540918.1**.

Importing Employee Data

1. Access the File Import and Export page from the Fusion application by clicking **Navigator > File > Import and Export** .
2. On the File Import and Export page, in the Search Results section, click the **Add** button to upload the template zip file to the Universal Content Management (UCM).
3. On the Upload File modal page, click **Browse** and select the file for upload. Use the **Account** field to select the account for the file you are uploading.

4. Click **Save and Close**. You will see the file listing on the File Import and Export page with the details of the upload.

Scheduling the Import Export process using File-Based Data Import


1. Access the Scheduled Processes page from the Fusion application **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Process page, click the **Schedule New Process** button and enter values for the fields on the Schedule New Process modal page:

Page Element	Description
Type	Ensure that the Job option is selected.
Name	Search and select the Load Interface File for Import value from the list of names.
Description	Displays a description about the selected process.


3. Click **OK**. The service now opens the Process Details page for you to select the import process for the process name you entered in the above step:

Page Element	Description
Import Process	Click the drop-down menu, search and select the Import Agency Staff value using the lookup list.
Data File	Click the drop-down menu and select the generated ZIP file you uploaded earlier, as described in the previous section.

4. Click **Submit** and accept the confirmation message to complete the submission.

 **Note:** The submission only confirms that the files are sent for processing. To view the details of the completed process, you must access the log file. The log file lists all the successfully processed records and the records that are in error, with the details of the error.

Records in Error

 **Note:** When you fix the errors in the spreadsheet and prepare to resubmit it for processing, you must delete the records that were processed successfully in the previous run. All the records preceding the ones in error are created in the Public Sector Agency Staff tables. Resubmitting the template having those records results in creating duplicate entries of the staff records.

Scenarios for importing employee data from a third-party system to Public Sector Agency Staff profile


Prerequisite

The scenarios listed here assume that the following prerequisite has already been set up: Each record in the template should contain a unique identifier called the Interface ID. The interface ID is used as a key identifier while establishing parent-child relationships across the pages of the template spreadsheet.

Consider importing the employee details into the tables of Public Sector Agency Staff. You can perform the following actions using the Import template:

- Add a new staff member
- Assign personal attributes
- Assign job functions and attributes
- Assign roles
- Disable an agency profile

The following scenarios detail how you can create a new agency staff record and seamlessly update various parameters of your existing agency staff.

 **Note:** The InsertUpdateFlag field on the Import template is the determining factor as to whether the record is for a new agency staff or for updating an existing agency staff. Enter the value “I” if you are inserting a new record, or “U” if you are updating an existing record. Also note that the **Person Number** field is mandatory if you are updating a record.


Scenario 1: Adding a new agency staff

Consider creating a new agency staff record staff in your Public Sector Agency Staff.

If your agency is not a Fusion HCM customer, you use the template to enter details in all the pages of the template spreadsheet and then schedule the import process to import the newly added employee record. You must enter the value “I” in the InsertUpdateFlag field to qualify the record as a new agency staff entry.

The following example shows the data on the spreadsheet detailed in the above scenario – Adding a new staff member.

Record Number	*Interface ID	*InsertUpdateFlag	*First Name	*Last Name	*Email	*Business Unit	*Legal Entity
1	467436	I	John	Simmons	john.s@example.c	Sample Corporation	Sample Corporation
2	467437	I	Robert	James	robert.j@example.	Sample Corporation	Sample Corporation

 **Note:** The above example displays a limited number of fields. For a complete list of fields, refer to the Import template spreadsheet.

If your agency has implemented Fusion HCM, you use the HCM loader or enter the necessary employee details manually. In such cases, the following PSCR specific attributes are required to be updated:

- Job Title
- Agency Department
- Agency ID
- Agency Location
- Job Group
- Is Supervisor

- Enabled


Scenario 2: Updating personal details of an agency staff

Consider updating changes to the personal details of an agency staff in your Public Sector Agency Staff. You can perform the following actions:

- Change work phone number
- Change location
- Change department
- Change job title
- Assign job group
- Revoke job group
- Change supervisor status

The following example shows the data on the spreadsheet detailed in the above scenario.

Record Number	*Interface ID	*Person Number	*Work Phone Number	*Location	*Department	*Job Title	*Is Supervisor
1	467436	PERNUM8	16348773	30010016887961	1001	Agency Staff	Y
2	467437	PERNUM9	32178939	30010016887961	1001	Building Inspector	N

 **Note:** The above example displays a limited number of fields. For a complete list of fields, refer to the Import template spreadsheet.

Scenario 3: Updating job functions and their attributes

Consider updating changes to job functions and their attributes of an agency staff in your Public Sector Agency Staff. You can perform the following actions:

- Assign job functions and attributes
- Assign additional job attributes to existing functions
- Remove job attributes
- Remove job functions

The following example shows the data on the spreadsheet detailed in the above scenario.

Record Number	*Interface ID	*Assignment Flag	*Person Number	Agency ID	Job Function ID	Job Attribute	Attribute Value
1	467436	I	PERNUM8	1	ORA_BUILDING_I	ORA_INSPECTIOI	Plumbing
2	467437	D	PERNUM9	1	ORA_CASHIER	ORA_CASHIER_IL	7574343

Scenario 4: Updating roles

Consider updating roles of an agency staff in your Public Sector Agency Staff. You can perform the following actions:

- Assign additional roles
- Revoke roles

The following example shows the data on the spreadsheet detailed in the above scenario.


Record Number	*Interface ID	*Role Action	*Person Number	*Role Name
1	467436	A	PERNUM8	Employee
2	467437	R	PERNUM9	Application Implementation Consultant

Scenario 5: Disabling agency staff profile

Consider disabling an agency staff profile in your Public Sector Agency Staff. You can perform the update without having to make any manual entry in your records. The user interface as well as the Import Agency Staff functionality allow you to disable agency staff profiles.

The following example shows the Enabled field on the spreadsheet, as detailed in the above scenario.

Record Number	*Interface ID	*Person Number	*Work Phone Number	*Location	*Department	*Job Title	Enabled
1	467436	PERNUM8	16348773	30010016887961	1001	Building Inspector	Y
2	467437	PERNUM9	32178939	30010016887961	1001	Agency Staff	N

 **Note:** The above example displays a limited number of fields. For a complete list of fields, refer to the Import template spreadsheet.

