

Oracle Public Sector Compliance and Regulation Cloud

Using Community Development Planning and Zoning

July 2019

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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.

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1 Managing Public Users

Overview of Public User Accounts and Profiles

Public users can interact with an agency for either personal projects or for business projects. To distinguish personal activity from business activity, the accounts for registered public users can have multiple profiles.

Accounts Versus Profiles

Accounts for registered public users can include one personal profile and one or more business profiles. The personal profile represents the user's personal dealings with the agency, while the business profiles each represent a business on whose behalf the user interacts with the agency.

Applications are associated with specific profiles rather than with the overall account. When the user starts an application, the application is associated with the currently selected profile. Similarly, when users view their existing applications, the system displays the subset of applications that are associated with the current profile.

The public user registration process creates a default profile for the user. During registration, the user indicates whether the account use is personal or business. Information that is provided during registration is associated with this default profile.

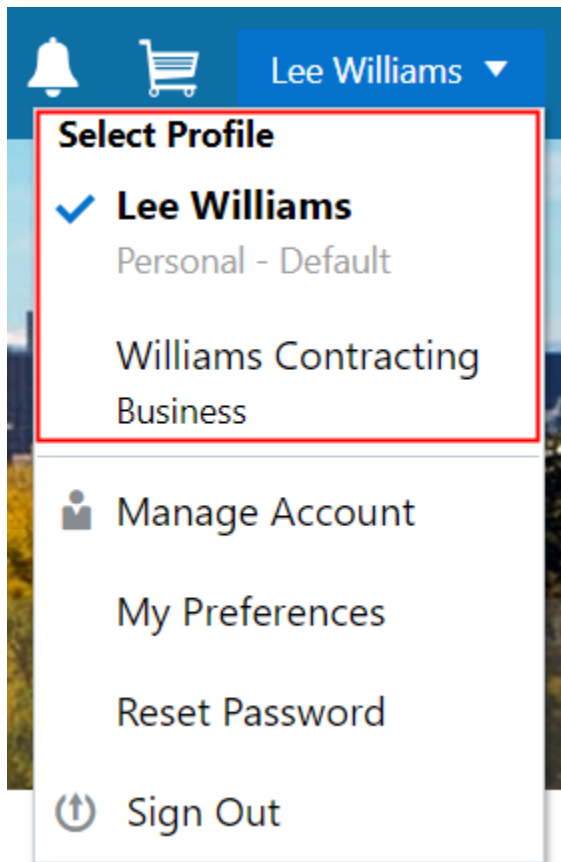
After an account is created, additional profiles can be added. If an account has multiple profiles, any profile can be designated as the default profile. Profiles can be made inactive, but they can't be deleted.

Profile Selection

When a user signs in, the user's default profile is the current profile. The profile name appears in the page header.

To switch profiles, the user clicks the current profile name to display a menu of account-related options. If any additional active profiles exist, the menu includes a Select Profile section that lists all active profiles. To switch to a different profile, the user clicks the desired profile name.

This example illustrates the Select Profile option in the menu under the current profile name.



A user who has multiple profiles can switch to another profile on pages that contain profile-sensitive information. When the user changes profiles on a profile-sensitive page, the data on the page reloads to show the selected profile's data. If the page isn't profile-sensitive, you can go to the landing page if you want to switch your profile.

Account Data Versus Profile Data

Accounts have certain information that applies to all profiles. This account information includes the following:

- Name: the name of the person who owns the account.
- Access: the user name that is used for signing in, and the email address that is used during the registration process
- Additional Information: whether the user's contact information is hidden from public view.
Your agency configures whether to give users this option..
- Terms of Use: the terms of use to which the user agreed.

Profiles contain additional information. This profile-specific information does not get synchronized across multiple profiles. Profile information includes the following:

- Profile Basics: the profile name, type, active/inactive status, and whether it is the default profile for the account.
- Profile Information: the business name and business type for a business profile. This category isn't relevant to personal profiles.
- Contact Information: addresses, email addresses, and phone numbers.
- Contacts: people who might be added as contacts for application that are associated with this profile.

When adding contacts to an application, users can quickly pick contacts who are already associated with the profile rather than having to manually add a new contact.

- Licenses: a list of licenses such as contractor licenses, the contractor status for the profile, and any related verification statuses.
- Trust Accounts: a list of payment accounts and any related verification statuses.

Attachments can be associated with either an account or with a specific profile.

- The list of attachments for the account displays account attachments and profile attachments. It identifies which profile, if any, the attachment is associated with.
- The list of attachments for a specific profile displays only that profile's attachments.

The Public User Registration Process

Although anonymous public users can access generic information, users must register before they can create permit applications or planning applications.

Here is a summary of the registration process:

1. On the landing page for anonymous users, the public user clicks the Register link in the page header.
2. The user enters information on the Register page.
3. The user accepts the registration terms of use.
4. The user submits registration information.
5. A confirmation page directs the user to complete the registration process by following instructions in an email that the system sends.
6. The user clicks the link in the email to set up the account password.
7. The user submits the password to complete the registration process.
8. The system takes the user to the registered public user landing page.

To sign in again in the future, public users click the **Sign In** link in the header of the landing page for anonymous users.

This example illustrates the Register page.

Register

* Account Use Personal Business

Are You a Contractor?

? Mask My Contact Information from Public View

Salutation

* First Name

* Last Name

* Business Name

* Email Address

* User Name


Phone Ext.

[Terms and Conditions](#)
Read and accept the terms and conditions before proceeding

Entering Registration Information

Users enter the following registration information.

Page Element	Description
Account Use	<p>Indicates whether this is a personal account or a business account.</p> <p>Accounts can have both personal and business profiles. The registration process creates a single profile, and additional profiles must be added later. The Account Use setting determines whether the default profile that is created during registration is a personal or business profile.</p> <p>For more information about profiles, see Overview of Public User Accounts and Profiles.</p>
Are You a Contractor?	<p>The user's contractor status is associated with the default profile that is created during the registration process.</p> <p>The default contractor status is No. If the user changes the answer to Yes, the adjacent Add License button is enabled so the user can provide contractor license details. License information is required when a user self-identifies as a contractor.</p> <p>Clicking the Add License button opens the Contractor License Details page, which includes these fields: License Type, License Number, Issued On, and Expiration Date.</p> <p>After the user saves license information, the Add License button changes to an Edit License button.</p>

Page Element	Description
	<p>During registration, the user can enter information for only one contractor license. After registering, the user can add additional licenses from the Manage Account page. See Managing Public User Accounts.</p> <p> Note: Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.</p>
Mask My Contact Information from Public View	<p>Gives the user the option to mask their name and contact information when a member of the public views the user's applications.</p> <p>This question appears only if it is enabled on the Public User Setup page.</p> <p>The default answer to this question is No.</p> <p>Users can access help for this question by clicking the question mark icon adjacent to the question. The help explains that even when the user's own information is masked, the property addresses for all applications are visible to the public.</p>
Salutation	<p>A title such as Ms. or Mr. that is used to address the person.</p> <p>This field is optional.</p>
First Name and Last Name	<p>The user's name, which is the same across all of the user's profiles.</p>
Business Name	<p>This field is visible only if the Account Use field indicates that this is a business account. The business name entered here is associated with the business profile that the registration process creates. If additional business profiles are added later, they have their own business names.</p>
Email Address	<p>The user's email address. After the user submits registration information, the system sends an email to this address. The email contains a link that the user needs in order to complete the registration process.</p> <p>This email address is also associated with the default profile that the registration process creates. If the user registers as a business, the email type is Work. If the user registers a personal account, the email type is blank.</p> <p>If a user attempts to register with an email address that is already associated with an account, an error message appears. The message says to use the Sign In page to access the existing account or to recover a forgotten user name or password.</p>
User Name	<p>The user name that the public user will use to sign in to the system. User names must be unique, and the system displays an error message if the user tries to create an account under a user name that already exists.</p> <p>Note that the user does not select a password at this point. Password creation occurs after the user submits registration information.</p>
Phone	<p>A phone number for the account holder. This field is optional.</p>


Agreeing to Terms and Conditions

The Public User Setup page specifies whether public users must agree to terms and conditions. If users must agree, the setup page also specifies the Terms of Use definition to use during registration, and public users must accept the terms and conditions before submitting registration information.

When users must agree to the terms of use, the description from the Terms of Use definition appears as a link on the Register page. Instructional text directs the user to read and accept the terms before proceeding.

To view and accept the terms, the user clicks the link to open a new window. The window displays the complete text of the terms followed by a check box labeled **I have read and accepted the terms and conditions**. The user selects the check box, then closes the window using the **x** in the top right corner of the window.

After the terms are accepted and the user is back on the main Register page, the instructional text for the terms link is replaced with a selected check box labeled **I have read and accepted the terms and conditions**. A user who deselects the check box is not allowed to register without first reopening the terms window to accept the terms again.

 **Note:** If the terms of use change, users who have already registered are required to accept the new terms. When a user attempts to sign in after terms have changed, a window with the new terms opens, and the user must select the agreement check box in order to continue. This occurs if a new effective-dated Terms of Use definition goes into effect, either because you change the terms of use definition on the Public User Setup page, or because the definition in use has a new effective date that is after the date that the user most recently signed in.

Completing Registration by Resetting the Password

When the public user clicks the Register button, a confirmation page provides instructions for completing the registration process. The instructions direct the user to an email with the necessary information.

The confirmation page also provides a registration ID number for reference in case the user needs to contact the agency for help. The registration number is the user's party ID.


These are the system actions and user steps that finalize the registration:

1. The system creates user account information in the Oracle Public Sector Compliance and Regulation system and in the Fusion Applications system.
2. The system emails the user a link for completing the registration process.
3. The link takes the user to the Reset Password page in the Oracle Applications Cloud.

Although the page name suggests that the user is resetting a password, the user is actually creating a password for the first time.

4. The user enters a password and confirms it, then clicks the Submit button.
5. The system creates the password, completing the registration process.
6. The system transfers the user to the Public Sector Compliance and Regulation landing page for registered public users.

The emailed link that the user clicked to access the Reset Password page includes the parameter that redirects the user to the appropriate page.

 **Note:** If a user attempts to register with an email address that is already associated with an account, an error message appears. The message says to use the Sign In page to access the existing account or to recover a forgotten user name or password.

Accessing Public User Account Information

Registered public users have self-service access to account management. Agency staff can also update account and profile information for public users.

Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

1. Select **Public User > Public Access User**.
2. Search for the desired user account.
3. Click the > icon for the row with the desired user account.

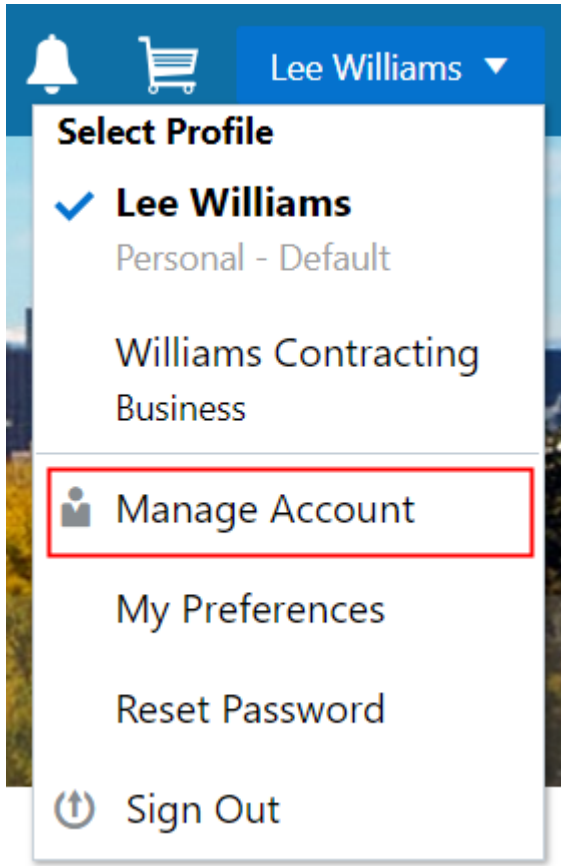
Account Management Navigation for Registered Public Users

To access self-service account management functionality, a public user who has signed in follows these steps:

1. Sign in to access the public user landing page.
2. Click the current profile name that appears in the page header.

A drop-down menu appears.

This example illustrates the drop-down menu under the current profile name.



3. Select **Manage Account**.

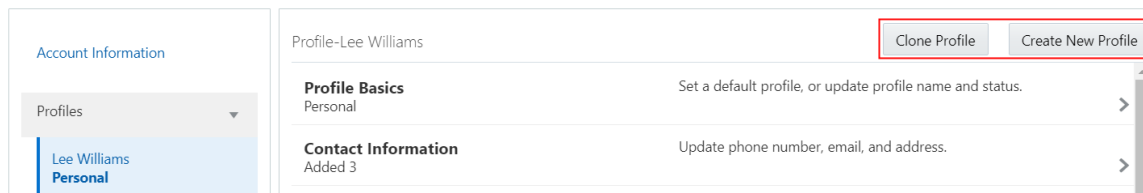
Adding Profiles to a Public User Account

When a public user registers, the new account has a default profile with information supplied during the registration process. The public user can create additional profiles through self-service account management. Agency staff also have access to this account management option.

Create new profiles from the Manage Account page. For information on the different ways that registered public users and agency staff access this page, see [Accessing Public User Account Information](#).

This example illustrates the Manage Account page and the buttons used to create additional profiles.

Manage Account



Creating a New Profile

To create a new profile:

1. Access the Manage Account page.
2. Click any profile name in the left frame of the page.
3. Click the **Create New Profile** button.
4. On the Create New Profile page, enter the following information:

Page Element	Description
Profile Name	Enter a descriptive name. This is the name that appears in the page header when this profile is in use.
Profile Type	If the account does not already have a personal profile, select either Personal or Business. If a personal profile already exists, the profile type is Business and the field is read-only.
Business Name	If the profile type is Business, enter the business name. This field is not visible for personal profiles.
Status	Select Active or Inactive. A profile must be active to be the default profile or for a user to switch to the profile. Inactive profiles are not editable. To add any information other than the basic information on the Create New Profile page, you need to make the profile active.

5. Click **Create**.

The new profile is created. The only profile data is the basic data that you provided, so you need to manually add any additional information such as contact information or licenses. For information about adding additional profile information, see [Managing Public User Accounts](#).

Cloning a Profile

Cloning profiles minimizes data entry when you want to create a new profile that has some of the same information as an existing profile.

If the original profile has verified licenses or trust accounts, cloning the profile ensures that the verification status is carried into the new profile and no new verification is needed.

The cloning process does not copy attachments to the newly created profile.

To clone a profile:

1. Access the Manage Account page.
2. In the left frame of the page, select the profile that you want to clone.
3. Click the **Clone Profile** button.
4. On the Clone Profile page, enter the following basic profile information:

Page Element	Description
Clone From	This read-only field displays the name of the profile that you're cloning.

Page Element	Description
New Profile	Enter a descriptive name for the new profile. This name appears on the landing page banner when this profile is selected.
Profile Type	If the account does not already have a personal profile, select either Personal or Business. If a personal profile already exists, the profile type is Business and the field is read-only.
Business Name	If the profile type is Business, enter the business name. This field is not visible for personal profiles.

5. Select the check boxes for the types of information that you want to copy into the new profile:

Page Element	Description
Contact Details	Select this check box to automatically select the check boxes for all three specific contact methods: Address , Phone , and Email . Deselect this check box to clear the check boxes for all three specific contact methods. You can also select and deselect the individual check boxes for each contact method.
Contacts	Select this check box to copy contacts into the new profile.
Licenses	Select this check box to copy licenses into the new profile. Verification statuses are also copied to the new profile, so agency staff does not have to re-verify the information.
Trust Accounts	Select this check box to copy trust account information into the new profile. Verification statuses are also copied to the new profile, so agency staff does not have to re-verify the information.

6. Click **Create**.

The new profile is created with the profile information that you specified. You can make additional changes manually.

Setting the Default Profile

The default profile is the one that is selected when a user first signs in. The default can't be changed during the creation of a new profile, but after the new profile is saved, it can be made into the default.

To designate a profile as the default profile:

1. Access the Manage Account page.
2. In the left frame of the page, select the profile that you want to use as the default.
3. In the right frame of the page, select **Profile Basics**.
4. On the Profile Basics page, select the **Default** check box.

Only active profiles can be set as the default. If the profile is inactive, change the status to Active and save the new status. This closes the Profile Basics page. When you return to the Profile Basics page, you can select the **Default** check box.

5. Click **Save**.

The new default is saved. The **Default** check box on the previous default profile is deselected when the new default is saved.

Managing Public User Accounts

This topic describes the account and profile information that can be updated using account management functionality. The Manage Account page is available to both public users, who can manage their own accounts, and to agency staff, who can manage information for any public user.

Registered public users access the Manage Account page from the menu under the user's profile name in the page header. Agency staff accesses the Manage Account page from the Public User Access page. For detailed navigation instructions, see [Accessing Public User Account Information](#).

Public User Access Versus Agency Staff Access

For the most part, public users and agency staff have access to the same account management options. These are the exceptions:

- Public users can see the verification status for any data that requires agency verification, but only agency staff can update the verification status.
- If account attachments are enabled, public users can't delete attachments unless you configure the Public User Setup page to allow this action. Agency staff can always delete attachments.

 **Note:** Agency staff do not have access to user passwords, which are not part of account management.

Managing General Account Information

General account information includes data that is part of the overall user account rather than being related to a profile. General account information is initially provided during the user registration process.

To manage account information :

1. Access the Manage Account page.
This page has two frames. Use the left frame to select either the overall account or a specific profile. Use the right frame to view and update details for the selected item.
2. Select **Account Information** in the left frame.
This is selected by default when you first access the Manage Account page. When it is selected, the right frame list the different types of account information. The row for each type of information includes the section name and instructional text. The **Name** row additionally displays the user's full name.
3. To view or update name information:
 - a. Click the **Name** row in the right frame.
The Name page appears.
 - b. Review or update information in the following fields: **First Name, Middle Name, Last Name, Salutation, Display Name** (a read-only value that concatenates the user's first, middle, and last names), **Initials, Suffix,** and **Title.**

Page Element	Description
File Name / Date	The file name of the attachment, and the date that the attachment was added to the account.
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Profile Name	If the attachment is associated with a specific profile, the profile name appears. If the attachment is associated with the account in general (and not with a specific profile), this column is blank.
Actions	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.

4. To add a new attachment:

- a. Click **Add**.
- b. Select a file using your browser's file selection window.
- c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
- d. Click **Upload**.

When the upload is complete, the new attachment appears in the list on the Attachments page.

5. To view or modify attachment information:

- a. Click the **Actions** icon and select **View Details**.
- b. On the Attachment page, review the **File Name**, the **File Size**, and the **Last Updated By** and **Uploaded By** user names.
- c. Optionally update the **Description**.
- d. To change which profile, if any, is associated with the attachment, use the **Profile Name** field.


If this field does not have a value, the attachment is associated with the overall account rather than a specific profile.

- e. Click **Save** or **Cancel** to return to the Attachments page.

6. To download a file, click the **Actions** icon and select **Download**.

7. To delete a file, click the **Actions** icon and select **Delete**.

You are prompted to confirm the deletion.

 **Note:** Agency staff can always delete attachments. Public users can't delete attachments unless the Public User Setup page is configured to allow this action.

8. To close the Attachments window, click **Cancel**.

Viewing a Profile Summary

On the Manage Account page, the left frame lists all of the profiles that are associated with an account. Below each profile name, the profile type appears. The word Default identifies the default profile. The word Inactive identifies any inactive profiles.

Selecting a profile in the left frame causes the right frame to display summary information about the profile. This information is broken into sections.

Clicking a section opens a detail page with complete information, but you can also see summary data directly beneath the section name on the Manage Account page.

To view the summary information for a profile:

1. Access the Manage Account page.
2. Select a profile in the left frame.

If no profiles are visible, click the **Profiles** header to expand the list of profiles.

3. Review the following summary information:

Profile Section	Information Displayed
Profile Basics	The profile type: Personal or Business.
Profile Information (for business profiles only)	No summary information appears.
Contact Information	The number of contact methods for the profile.
Contacts	The number of contacts for the profile.
Licenses	The number of licenses for the profile, and whether the profile has contractor status. The self-reported contractor status appears, but you must access license details to see if the status has been verified.
Trust Accounts	The number of trust accounts for the profile.

Updating Profile Basics

To update profile basics:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Profile Basics** section to open the Profile Basics page.
4. Review and update the following fields:

Page Element	Description
Profile Name	The identifying name for the profile. This name appears in the page header when this is the current profile and in the Select Profile menu for switching profiles. This name also appears in the profile list on the Manage Account page. The default name for the profile that is created during the registration process is the public user's first and last name. This default name is truncated if it is longer than 60 characters.
Default	Select this check box to designate the profile as the default profile for the account.

Page Element	Description
	<p>The default profile is the one that's used when the public user signs into the system. The profile that gets created during the registration process is the default profile until you add additional profiles and change the default.</p> <p>Only one profile can be the default, so when you select this check box for one profile, the check box is automatically deselected for the previous default.</p> <p>The check box is read-only for the current default profile. This prevents you from deselecting it and creating a situation where there is no default profile.</p>
Profile Type	Displays either Personal or Business. You cannot change the profile type.
Status	<p>Profiles can be Active or Inactive. Only active profiles appear in the Select Profile menu for switching profiles.</p> <p>Inactive profiles are not editable. To make a profile active after you create it, edit the profile basics using account management functionality. See Managing Public User Accounts.</p>

5. Click **Save** or **Cancel** to return to the Manage Account page.

Updating Profile Information for a Business

To update profile information for a business:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Profile Information** section to open the Profile Information page.
4. Review and update the following fields:

Page Element	Description
Business Name	A free text field for the business name.
Business Type	A drop-down list of business types. The values for this field are defined on the Lookup Type Details page for the ORA_PSC_CC_BUSN_TYPE lookup type.

5. Click **Save** or **Cancel** to return to the Manage Account page.

Managing Contact Information

Contact information consists of the user's addresses, phone numbers, and emails. Only US addresses are supported.

The primary contact information for a profile is used as the default contact information in the user's applications.

To update contact information:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Contact Information** section to open the Contact Information page.
4. To add or modify a contact method:
 - a. If you are adding a contact method, click **Add** in the appropriate section (Address, Phone, or Email) to open the Details page.

- e. Enter a **Phone** and **Ext** (extension).
- f. Enter an **Email**.
- g. Click **Save** or **Cancel** to close the Contact Details page .
Any information you save immediately appears on the Contacts page.
- h. Click **Cancel** on the Contact page to return to the Manage Account page.


Updating Licenses

The licenses section of the Manage Account page includes both a list of professional licenses and a statement of whether the profile is for a contractor.

If your agency requires staff to verify contractor status and professional licenses, staff members who access the information can update the verification statuses for both types of information. Public users can see but not update the verification statuses.


To update license information:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Licenses** section to open the Licenses page.
4. Review or update these fields related to the user's contractor status:

Page Element	Description
Are you a Contractor?	To indicate the contractor status, select either Yes or No.
Verification Status	<p>This field is visible if the Public User Setup page is configured to require that contractor status be verified.</p> <p>The default value is Pending verification.</p> <p>Agency staff updates the status to either Verified or Verification failed after independently verifying the user's contractor status.</p>
	<p> Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.</p>

5. To add a new license , click the **Add**, or to view an existing license, click the row for the license you want to view.
The License Details page opens.
6. Review and update the following fields on the Licenses page:

Page Element	Description
License Type	This is a free text field for entering the type of license, such as a General Contractor license or an Electrical Contractor License.
License ID	Enter the license number that uniquely identifies the license.
Start Date	Enter the date that the license became valid.

Page Element	Description
Expire Date	Enter the date that the license expires or requires renewal.
Verification Status	<p>This field is visible if the Public User Setup page is configured to require that licenses be verified.</p> <p>The default value for a new license is Pending verification.</p> <p>Agency staff updates the status to either Verified or Verification failed after independently verifying the license.</p> <p> Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.</p>

7. Click **Save** or **Cancel** to return to the Licenses page.
8. Click **Save** or **Cancel** to return to the Manage Account page.
Saving on the Licenses page saves changes to the **Are you a Contractor** and **Verification Status** fields. Changes to licenses are saved from the License Details page.

Updating Trust Accounts

The Trust Accounts section of a profile lists trust accounts that are used for payments to the agency.

If your agency requires staff to verify trust accounts, staff members who access the information can update the Verification Status field. Public users can see the verification status, but they can't update it.

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Trust Accounts** section to open the Trust Accounts page.
4. To add a new trust account, click **Add**, or to view an existing trust account, click the row for the account you want to view.
The Trust Account Details page opens.
5. Review and update the following fields on the Trust Account Details page:

Page Element	Description
Account Number	Enter the unique account number for the trust account.
Description	The description might include the financial institution name and other important information about the account.
Status	Select Active or Inactive.
Verification Status	<p>This field is visible if the Public User Setup page is configured to require that accounts be verified.</p> <p>The default value for a new account is Pending verification.</p>

Page Element	Description
	Agency staff updates the status to either Verified or Verification failed after independently verifying the account information that the user provided.



Note:

Although public users and agency staff can both see the verification status, only agency staff can update the value.

6. Click **Save** or **Cancel** to return to the Trust Accounts page.
7. Click **Cancel** to return to the Manage Account page.

Managing Profile-Specific Attachments

Your agency controls whether attachments can be added to user accounts. Set this option on the Public User Setup page.

Attachments can be associated with either an account or with a specific profile.



Note: When you access attachments for a specific profile, you see only that profile’s attachments. To change the profile for an attachment, access the attachment details from the list of account attachments. The account-level list includes the attachments for all profiles as well as attachments that are not associated with a specific profile.

To manage profile-specific attachments:

1. Access the Manage Account page.
This page has two frames. Use the left frame to select either the overall account or a specific profile. Use the right frame to view and update details for the selected item.
2. In the left frame of the page, select a profile.
When a profile is selected, the right frame displays information for that profile. The row for attachments includes information stating how many attachments (if any) are associated with the selected profile.
3. Click the **Attachments** item in the right frame.
The Attachments window opens. It lists the attachments that are associated with the profile.

Page Element	Description
File Name / Date	The file name of the attachment, and the date that the attachment was added to the account.
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Actions	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.


4. To add a new attachment:
 1. Click **Add**.
 2. Select a file using your browser’s file selection window.

3. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
4. Click **Upload**.

When the upload is complete, the new attachment appears in the list on the Attachments page.

5. To view or modify attachment information:
 - a. Click the **Actions** icon and select **View Details**.
 - b. On the Attachment Details page, review the **File Name**, the **File Size**, and the **Last Updated By** and **Uploaded By** user names.
 - c. Optionally update the **Description**.
 - d. Click **Save** or **Cancel** to return to the Attachments page.
6. To download a file, click the **Actions** icon and select **Download**.
7. To delete a file, click the **Actions** icon and select **Delete..**

You are prompted to confirm the deletion.

 **Note:** Agency staff can always delete attachments. Public users can't delete attachments unless the Public User Setup page is configured to allow this action.

8. To close the Attachments window, click **Cancel**.

Verifying Public User Information

You can configure the system to require verification of various types of public user account and profile data. The actual verification occurs outside of the system, but after the information is verified, agency staff updates verification statuses to indicate whether the information passed or failed the verification process.

Use the Public User Setup page to configure which types of information require verification. There can be up to three types of information that need to be verified:

- Whether the user is a contractor.
- The user's licenses.
- The user's trust accounts.

One option for verifying information is to use the Manage Account page. With this option, agency staff can navigate to the various pages that display each type of information, and they can update the verification status on those pages. For more information, see [Managing Public User Accounts](#).

Alternatively, the Public Access User page provides a convenient way to see and manage pending verification requests. This page displays the number of pending verification requests for each user, and it provides a link to the Pending Verification Requests page where you can update the verification status for individual requests.

This example illustrates the Public Access User page.

Public Access User

Name	User Name	Email	Active	Pending Verification Requests
Brandon Wood	brandon.wood	test@oracle.com	Yes	
Sara	Sara.Whit		Yes	3
Anne Collins	anne.collins		Yes	

This example illustrates the Pending Verification Requests page.

Pending Verification Requests

Sara (null)

Profile Name	Type	Verification Details	Verification Status
Sara Whit	User is a contractor		Pending verification
Sara Whit Enterprises	User is a contractor		Pending verification
Sara Whit Enterprises	User added or updated license	License Number SOL229 License Type Solar Issued On 1/1/17 Expiration Date	Pending verification

Cancel Save

Managing Verification Requests

To find and manage pending verification requests:

1. Select **Public User**, > **Public Access User**.
2. Locate accounts with a value in the **Pending Verification Requests** column.
This column displays the number of pending requests for the user. It's blank for users with no pending requests. The surest way to locate accounts with pending verifications is to sort accounts based on the number of pending requests. To sort by a specific column, click the triangle icon in the column header. Click again to reverse the sort order.
3. Click a value in the **Pending Verification Requests** column to access the Pending Verification Requests page.
The page lists the pending verification requests for the selected user. Requests that have already been verified (or failed verification) do not appear.
4. Review the following information for the requests to be verified:

Page Element	Description
Profile Name	Displays the profile that is associated with the data to be verified.
Type (type of request)	Explains what type of information must be verified. Values include:

Page Element	Description
	<ul style="list-style-type: none">○ User is a contractor○ User added or updated license○ User added or updated trust account
Verification Details	<p>Displays identifying details for a license or trust account.</p> <p>License details include the license number, license type, the date issued, and the expiration date.</p> <p>Trust account details include the account number and status.</p> <p>This column is blank for requests to verify a user's contractor status .</p>
Verification Status	<p>Because this page lists only pending verification requests, all rows initially have the status Pending Verification.</p>

5. Update the **Verification Status** for any requests where the verification process is complete.

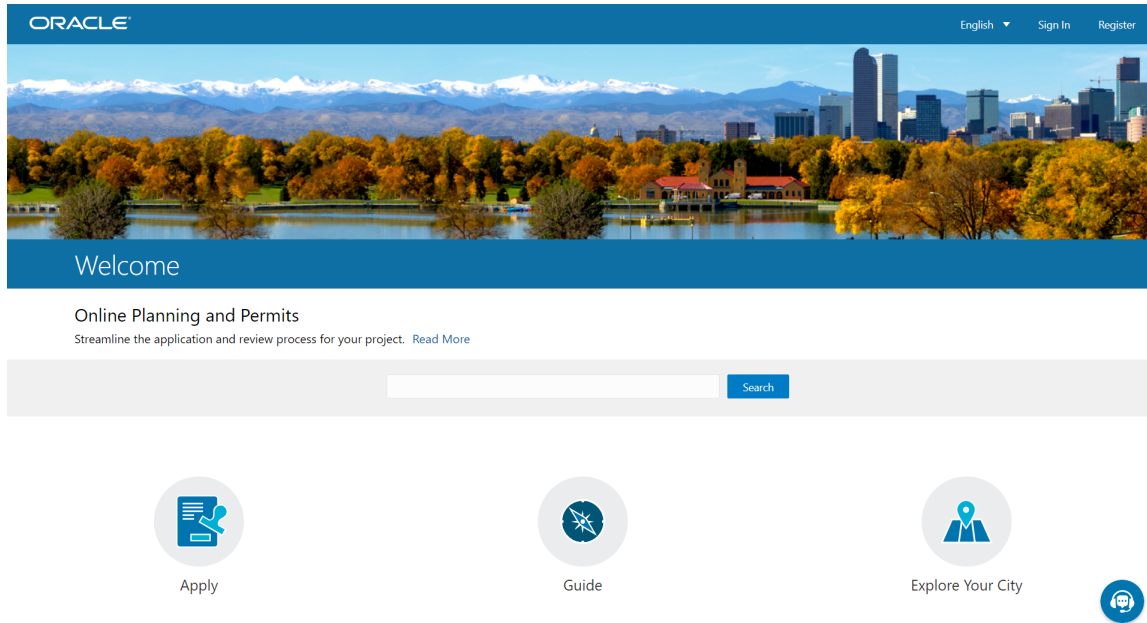
Select either Verified or Verification failed, depending on whether you were able to verify the information.

6. Click the **Save** button.

Overview of Public Landing Page Tiles

The public landing pages provide citizen access to the Oracle Public Sector Community Development Cloud. This topic describes the tiles that can be made available on the public landing pages. The tiles that actually appear depend on how your agency has configured the pages.

This example illustrates the public landing page as it appears to a user who is not signed in. This is known as the anonymous user landing page.



For information about the landing page for agency staff, or Agency Springboard, see [Using the Agency Springboard](#).

Landing Page Configuration

The elements on landing pages vary depending on how you configure the pages.

For information on configuring landing pages, see [Setting Up the Landing Page for Anonymous Users](#) and [Setting Up the Landing Page for Registered Users](#).

For information on setting up alerts to appear on the landing pages, see [Defining Alerts](#) and [Working with Ad Hoc Communications](#).

For information on setting up the digital assistant button, see [Initializing the Digital Assistant](#).

Tiles on the Anonymous User Landing Page

Also known as guests, anonymous public users are residents, business owners, contractors, and so on, who have not signed in or are not registered. From the anonymous user landing page, they can perform common tasks such as starting a permit application or planning application, accessing an interactive guide that provides recommendations for permit application types and planning application types, accessing an interactive map of the city, or starting a chat session using the digital assistant.

As delivered, the anonymous user landing page includes these tiles:

Page Element	Description
Apply	Provides access to a page where the user can choose an application type and then start an application.
Guide	Provides access to a questionnaire. The user provides information about a project, and the guide uses that information to recommend permit application types or planning application types. Your agency defines the guide questionnaire using Oracle Policy Automation (OPA). If your agency is not using OPA, this tile will not appear.

Page Element	Description
	<p>The questionnaire comes from the OPA policy model that you specify for the Permits offering, if one exists. If there's no offering-level policy, the questionnaire comes from the agency-level OPA policy model.</p> <p>For more information on identifying the OPA policy model to use, see Setting Up Agencies</p>
Explore Your City	Provides access to a map where the anonymous user can search for and view property details, including applications related to the property.

Tiles on the Registered User Landing Page

Registered users are residents, business owners, contractors, and so on, who are registered in the system. When a registered user is signed on, the landing page can include additional options related to the registered user's interactions with your agency.

As delivered, the registered user landing page includes all of the tiles that are available to anonymous users and additional tiles for accessing the user's own applications, inspections, and projects.

This example illustrates some of the tiles on the delivered landing page for registered users.



Applications: 99



Inspections: 7



Projects: 73

After registered users log in, they might see all or some of these tiles that are set up by the agency:

Menu Link	Description
Applications	<p>Provides access to a list of the user's own applications, including permit applications and planning applications. From the list, the user can access application details.</p> <p>The number of active applications appears in the tile label. This number includes both permit applications and planning applications.</p> <p>If one or more conditions have been applied to the user's applications, a conditions icon appears below the tile. The icon associated with the most severe condition is displayed. For example, if there is a permit application with a lock condition, which prevents further activity on the permit, and another permit application has a notice or informational condition placed on it, only the lock icon will appear below the tile.</p>
Inspections	<p>Provides access to a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.</p> <p>The number of scheduled and requested inspections appears in the tile label.</p>
Projects	Provides access to a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact.

Menu Link	Description
	This tile is hidden from users who do not have any projects.
	The number of active and completed projects appears in the tile label.

The Digital Assistant Button

If you implement the digital assistant, a button for invoking the assistant hovers over the public user landing pages.

This image shows the digital assistant button.



Clicking this button opens a chat window where the anonymous user can get help and search for transaction-related information.

For information on setting the digital assistant button, see [Initializing the Digital Assistant](#).

2 Managing Applications for Planning and Zoning

Using the Agency Springboard

The Agency Springboard provides a landing page for agency staff to manage their work.

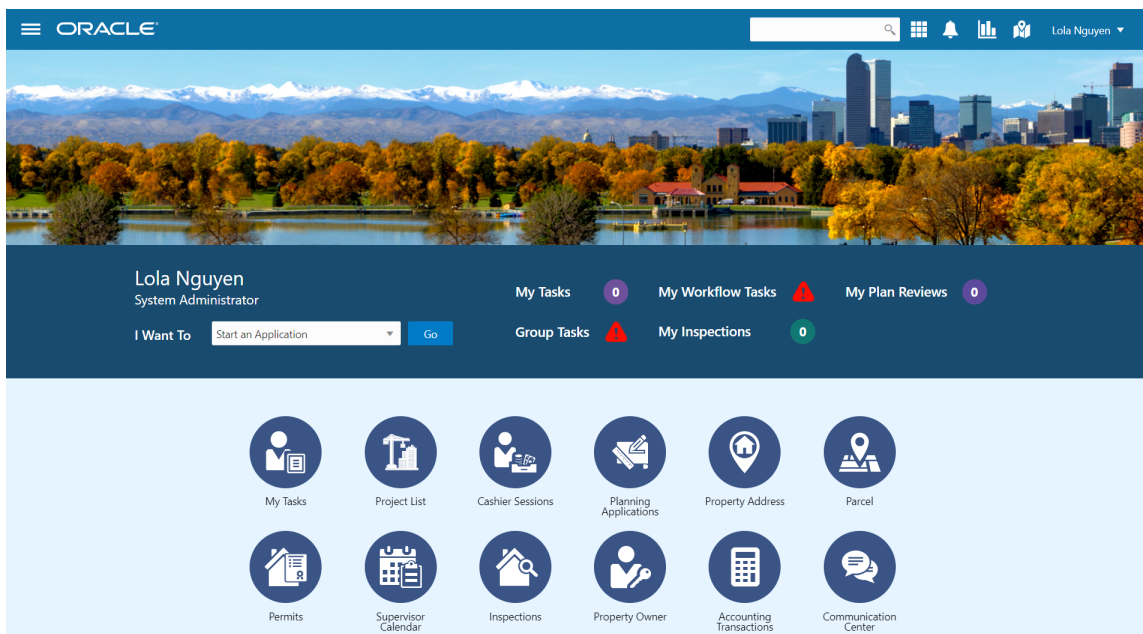
The Agency Springboard offers access to task lists and specific pages based on the staff role in the agency, from supervisors and accounting staff to permit technicians and inspectors.

You use these elements on the Agency Springboard to perform daily tasks:

- Global Banner
- Alerts
- Quick Actions (I Want To)
- Task Lists
- Tiles


Depending on your setup, the Agency Springboard might look like the following example. This example is configured to show the quick actions section, the task list element, and a selection of springboard tiles. Similar elements may appear on the landing pages for public users.

This example illustrates the Agency Springboard. The alerts banner is not shown in the example.



Page Element	Description
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Global Banner	The global banner appears as the page header with functionality that might include some or all of these elements:
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Page Element	Description
	<ul style="list-style-type: none"> • Navigator: Access pages using a tree menu navigation. • Global search: Search for applications (in process or completed), inspections (scheduled and completed), and projects (active only). Searching opens the search results page, which has three results lists, one for each type of object. The header for the list of projects is hidden if your agency does not use project functionality. • Page finder: If configured by your agency, you can navigate to pages by searching for the page in the page finder. • Notifications: Review notifications sent based on communication events based on the status of tasks. For example, as a plan coordinator, you and the applicant receive a notification when a plan review is closed or canceled. • Main map: Search applications by address, street, application ID, or parcel on an interactive map. • Profile: Select your preferences, reset your password, or sign out.
Alerts	Alerts are displayed as a banner that broadcasts messages with important information. These alerts are configured by the agency administrators.
Quick Actions (I Want To)	The quick actions section contains a drop-down list from which you choose an action, such as starting an application or scheduling an inspection. The actions in the list and on the tiles can provide access to the same pages.
Task Lists	<p>The task list section provides links to the Task Management page with predefined filters you access to manage tasks. The counts for each type of task help you monitor workload:</p> <ul style="list-style-type: none"> • My Tasks • Group Tasks • My Workflow Tasks • My Inspections • My Plan Reviews <p> Note: The items that appear on the Agency Springboard are determined by the security roles assigned. For example, agency roles specific to the permits service display all of the items above, whereas, roles specific to the planning and zoning service display My Tasks, Group Tasks, and My Workflow Tasks, but do not display My Inspections or My Plan Reviews.</p> <p>For more information about tasks, see Managing Tasks.</p>
Tiles	<p>Tiles appear in the springboard section as icons with links to the pages you use to administer specific types of transactions. For example, you can access pages for accounting, customer payments, plan reviews, inspections, conditions, and so forth.</p> <p>For example, click the Permits tile to open a list of permit applications. For more information, see Overview of Public Landing Page Tiles.</p>

For information about setting up these elements on the Agency Springboard, see [Setting Up the Agency Springboard](#).

Starting an Application

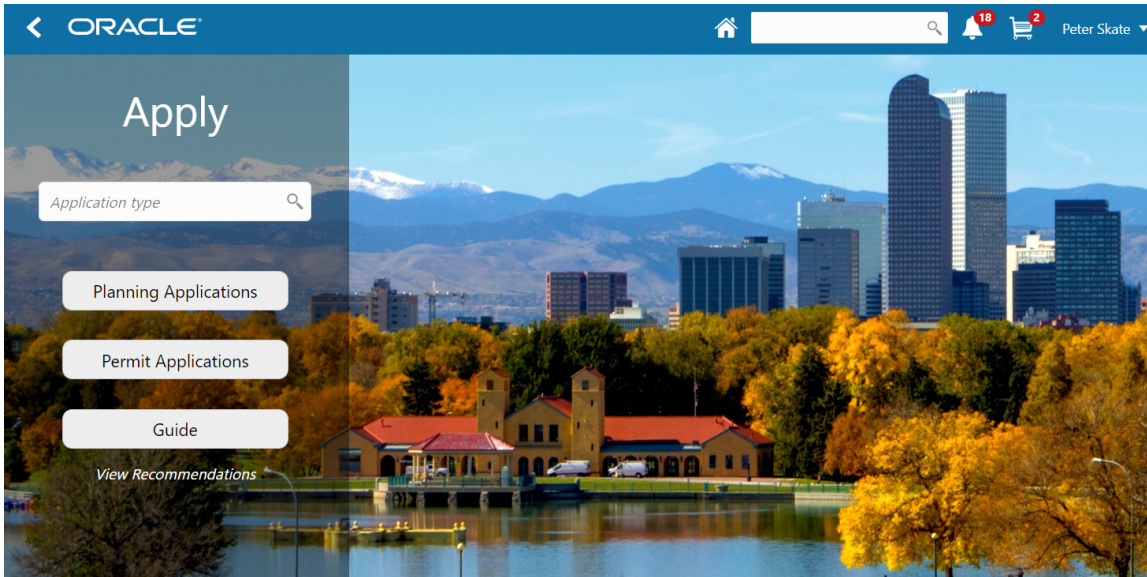
Before starting an application, users must determine the appropriate type of application. Application types, including types of permit applications and types of planning applications, are configured by the agency during implementation. The Apply page provides multiple tools to help users choose the appropriate application type.

Working With the Apply Page

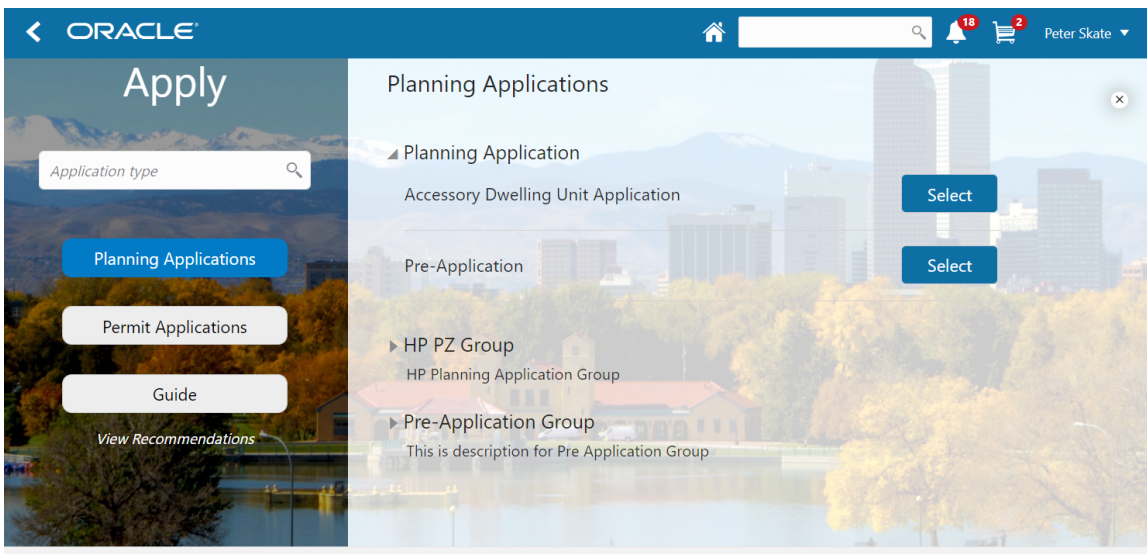
The Apply page offers these options for finding application types:

Option	Description	Available to Which Users
Search	Search for an application type by name.	All
Recent application types	View the five application types for the applications that you most recently submitted.	Registered public users, agency staff
Popular application types	View the five application types that have been used most frequently in the last 30 days	All
Browse application types	Browse categorized groups of permit application types or planning application types.	All
Guided questionnaire (includes saving and retrieving recommendations)	Answer questions about a project, and the guide provides recommendations regarding the necessary application types.	Registered and anonymous public users

This example illustrates the Apply page for registered public users. The left side of the page has multiple options for finding application types. In this example, the user has not started looking for an application type, so the right side of the page does not have any information.



In this example, the user has started browsing for application types. As the user works with the tools on the left side of the Apply page, the related information appears on an overlay on the right side of the page. In this illustration, the user is browsing for planning application types, so the overlay shows expandable categories of planning application types.



Note: The agency sets up the overlays to show the application offering on the left and the expandable application categories containing application types on the right side. For more information about setting up landing pages with overlays as illustrated in these examples, see [Setting Up Permit Display Groups](#) or [Setting Up Planning Application Display Groups](#).

Accessing the Apply Page

Users can directly access the Apply page from the landing pages:

- The **Apply** tile, which appears on the anonymous user landing page and the registered user landing page.

- The Start an Application quick action in the **I Want To** field, which appears on the registered user landing page and the Agency Springboard.

Registered users and agency staff have additional options for accessing the Apply page:

- Click the **Apply** button on the Applications page (registered users) or the Transactions page (agency staff).
- Click the **Apply** button after selecting a parcel on the Explore Your City map (registered users) or the Main Map (agency staff).

Searching for Application Types By Name


To search for an application type by name:

1. Click in the search field.
A drop-down list shows any matches.
2. If you don't see the desired application type in the initial drop-down list, begin typing the name of the application type.
As you type, the drop-down list changes to show only application types that match your search criteria.
3. To start an application, click the desired application type in the drop-down list.

Searching for Popular and Recent Application Types

To search for popular and recent application types:

1. Click in the search field.
2. Review these lists of popular and recently used application types that appears in the overlay on the right panel of the Apply page.

List	Description
Recent	Lists the application types (up to five) for the applications that the current user most recently submitted. These can be permit application types or planning application types.
 Note: Anonymous public users do not see a list of recent application types.	
Popular	List the application types (up to five) that have been used most often in the last 30 days.

3. To start an application, click **Select** for the desired application type.

Browsing for Application Types

To browse for application types:

1. Click either the **Planning Applications** button or the **Permit Applications** button on the Apply page.
The overlay on the right side of the page lists categories of application types for the specified transaction type.
2. Expand categories to browse the application types.
3. To start an application, click **Select** for the desired application type.

Using a Guided Questionnaire to get Application Type Recommendations

If your agency sets up a questionnaire using Oracle Policy Automation, the questionnaire can guide users and make application type recommendations. The guide uses the OPA policy model that you specify for the Permits offering, if one exists. If there's no offering-level policy, the questionnaire comes from the agency-level OPA policy model. For more information on identifying the OPA policy model to use, see [Setting Up Agencies](#).

To find application types using a guided questionnaire:

1. Click the **Guide** button to open the guided questionnaire.

This button appears only if the agency has configured an OPA policy for recommending application types.

2. Step through the questionnaire.

At the end of the questionnaire, the guide will recommend application types and provide an option to save the recommendations.

3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

- a. Enter a nickname for the recommendations in the **Nickname** field.
- b. Click **Save**.

The recommendations are associated with the user account and can be retrieved from the Apply page.

An anonymous user follows these steps to save the recommendations:

- a. Enter an email address in the **Email ID** field.
- b. Enter a nickname for the recommendations in the **Nickname** field.
- c. Click **Save**.

The system sends the user an email with an acknowledgement number that can be used to retrieve the recommendations from the Apply page.

Viewing Saved Recommendations

Public users can view guided questionnaire recommendations that they save.

To view the recommendation that are already associated with a registered public user's account, the user follows these steps:

1. Sign in.
2. Click the **Apply** button on the registered public user landing page.
3. Click **View Recommendations**.

The recommendations appear in the right panel overlay under the heading **Recommended Permits**.

Both registered and anonymous public users can retrieve recommendations that were saved during an anonymous session. To retrieve these recommendations, the user follows these steps:

1. Access the Apply page.
2. Locate the **Search Saved Recommendations** link:
 - o Anonymous users can find this link in the right frame of the Apply page.

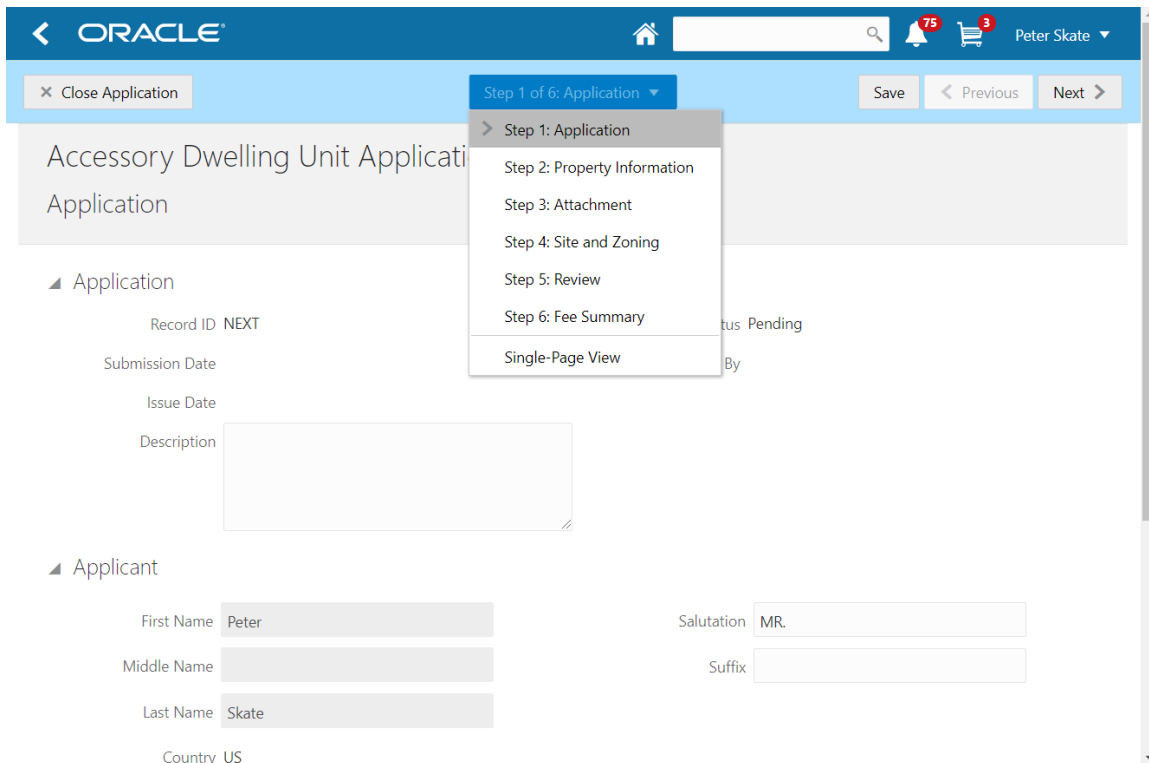
- Registered users who are signed in must click the **View Recommendations** link in the left panel. The resulting overlay on the right panel includes the **Search Saved Recommendations** link.
- Click **Search Saved Recommendations** to open a new window.
 - Enter the **Acknowledgement Number** that was emailed to the user when the recommendations were saved.
 - Enter the **Email** that the user provided when saving the recommendations.
 - Click **Search**.

Completing an Application

Note: An anonymous public user who starts an application must sign in before the application pages appear. Users who have not previously registered must register first.

Agencies configure the specific sections and fields for each type of application. Regardless of these specifics, the general interface for completing an application is consistent.

This example illustrates an application.



These are some elements of the standard interface for completing an application:

- The application begins with data entry steps that the agency configures. There can be one or many data entry steps.
- Agencies configure the sections and fields for each data entry step, but all applications include an Applicant section to identify the applicant. When a registered public user starts an application, the Applicant section is prepopulated, and certain identifying fields are read-only. Agency staff must manually enter applicant information.
- A Review step appears after the last data entry step for an application.

The page for the Review step shows all of the data entry sections on a single long read-only page.

- If applicable, the Fee Summary step is the last step in the application.
- A drop-down field at the top of the application page lists the steps, including data entry pages, the Review page, and the Fee Summary page. Selecting a step takes the user directly to that step.
- The final item on the step list is an option to toggle between the Single-Page View and Multi-Page View.

In single-page view, all of the data entry steps are combined into a single step labeled Step 1: Single-Page View. The Review and Fee Schedule steps remain separate.

- **Previous** and **Next** buttons enables users to move through the steps.
- On the final step, a **Submit** button replaces the **Next** button.

Submitting an application initiates the workflow for the application. Registered public users can't make changes to an application after it is submitted.

- The **Save** button enables users to save their progress without submitting the application.


If an application is saved without being submitted, the user can continue working on the application later.

- The **Close Application** button closes the application and discards unsaved changes.

A warning message gives users the chance to return to the application instead of closing it.


Managing Transactions

View application data and statuses for permits and planning applications using the Transactions page. You can also perform actions, such as paying fees and accessing detailed application information from this page.

 **Tip:** As agency staff, you can access this page on a phone as well as on a laptop or desktop computer. The layout changes based on the device you are using.

As agency staff, such as a permit technician or planning and zoning administrator, you can use the Transactions page to view a complete list of applications submitted to your agency. Go to the list of transactions to perform these tasks:

- Manage application activity.
- Create or resubmit permit and planning applications on behalf of applicants.
- Cancel pending and payment pending applications on behalf of applicants.
- Manually enter fee payments on behalf of applicants.
- Access details about permit and planning application activity.

 **Note:** The Transactions page provides a summary of permits and planning applications to agency staff only. Registered users who have applied for a permit or submitted a planning application for themselves or as a representative for someone else, see only the applications that they are associated with on the Applications page. The Applications page contains basic application information for the logged in user. The user profile controls which application data appear on the Transactions and Applications pages for agency staff and applicants, respectively.

Registered users can access the list by selecting Go to Applications from the quick actions drop-down list or by clicking the **Applications** tile on the landing page for registered users.

Agency staff can access the Transactions page by clicking the **Permits** or **Planning Applications** tile on the Agency Springboard.

This example illustrates the Transactions page showing permit applications, as viewed by agency staff and containing the page elements described in the following tables. The list under the **Permits** tab shows only active applications.

Transactions

Permits								Planning Applications	All
Application	Property	Description	Submission Information	Fees	Actions				
ZPER-FEN-2019-00187 AUTOPROP Plan review	2270 OTIS DR, ALAMEDA, US-CA	Residential Addition	Created by Joe Green on 3/12/19 Applicant: Rita Johnson	Fees Paid 50,000.00 USD					
ZPER-FEN-2019-00256 ZPerRecordType3 Submitted			Submitted by Joe Green on 3/13/19 Applicant: oats auto	Fees Balance 10,161.00 USD 233.00 USD					
ZPER-FEN-2019-00885 ZPerRecordType3 Submitted	No parcel information exists		Submitted by Joe Green on 3/26/19 Applicant: REGISTERED USER	Fees Balance 9,887.00 USD 9,887.00 USD					
ZPER-FEN-2019-01000 ZPerRecordType3 Submitted	No parcel information exists		Submitted by Joe Green on 3/27/19 Applicant: oats auto	Fees Paid 9,778.00 USD					
ZPER-FEN-2019-00775 ZPerRecordType3 Submitted	No parcel information exists		Submitted by Joe Boyd on 3/25/19 Applicant: REGISTERED USER	Fees Balance 9,742.00 USD 9,742.00 USD					
ZPER-FEN-2019-00288 ZPerRecordType3 Submitted	No parcel information exists		Submitted by Joe Green on 3/13/19 Applicant: oats auto	Fees Balance 9,740.00 USD 9,740.00 USD					

This example illustrates the Transactions page showing planning applications, as viewed by agency staff and containing the page elements described in the following tables. The list under the **Planning Applications** tab shows only active applications.

Transactions

Permits							Planning Applications	All
Application	Property	Description	Submission Information	Planner	Fees	Actions		
ZPZ-SITE-2019-00170 ZPZRecordType Submitted	No parcel information exists		Submitted by Joe Green today Applicant: OATS Auto		Fees Balance 591.28 USD 591.28 USD			
ZPZ-SITE-2019-00169 ZPZRecordType Submitted	No parcel information exists		Submitted by Joe Green today Applicant: OATS Auto		Fees Balance 591.28 USD 591.28 USD			
ZPZ-SITE-2019-00168 ZPZRecordType Submitted	No parcel information exists		Submitted by Joe Green today Applicant: OATS Auto		Fees Balance 591.28 USD 591.28 USD			
ZPZ-SITE-2019-00145 PZALUT Submitted	No parcel information exists		Submitted by Joe Green on 4/9/19 Applicant: OATS Auto		Fees Balance 2,971.00 USD 2,971.00 USD			
EZE-190414-00098 Accessory Dwelling Unit Application Payment pending	2200 OTIS DR, ALAMEDA, US-CA	Converting an existing 450 sq.ft. detached garage to a secondary dwelling unit	Created by SYSTEM_ADMIN on 4/14/19 Applicant: Peter Skate	Susan Anderson	Fees Balance 2,500.00 USD 2,500.00 USD			
PreApp-2019-00064 Pre-Application In process	2160 OTIS DR, ALAMEDA, US-CA	ADU - Construct Secondary Dwelling Unit on single unit dwelling-occupied parcel	Created by REGISTERED_PUBLIC_USER on 4/13/19 Applicant: Peter Skate	Susan Anderson	No fees			

Using the Transactions Page




1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, select one of the following tabs:
 - o **Permits:** View a list showing active permit applications only.
 - o **Planning Applications:** View a list showing active planning applications only.
 - o **All:** View a list showing all permits and planning applications, including inactive, canceled, and withdrawn applications.
3. You can perform these actions to display permits or planning applications that meet specific criteria:

Page Element	Description
Download	Click the download button to export the list to a .csv file.
Search	<p>Search by alphanumeric characters on the fields for permits or planning applications in the list. The permits or planning applications that meet the search criteria are displayed on the page.</p> <p>When you search on dates, use this format: MM/DD/YYYY.</p> <p>Search results display only the primary address for the permit or planning application. You can confirm the correct transaction by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.</p>
Filter By	<p>Apply filters to display permits or planning applications that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</p> <p>As a planner, you can also find the planning applications assigned to you or unassigned applications by selecting predefined filters, My Assigned Applications or Unassigned Applications, respectively.</p>
Sort By	<p>Select an option to sort the applications in the list by these fields:</p> <ul style="list-style-type: none"> ○ Application ○ Type ○ Status ○ Creation Date ○ Created By ○ Applicant ○ Total Fees ○ Total Due
List View	View the inventory of permits or planning applications in a list, on a grid, or on an interactive map. See Using Maps .
Grid View	
Map View	

Managing Application Activity







1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, select one of the following tabs:
 - **Permits:** View a list showing active permit applications only.
 - **Planning Applications:** View a list showing active planning applications only.
 - **All:** View a list showing all permits and planning applications, including inactive applications that are completed, voided, canceled, or withdrawn.
3. Use the information on the Transactions page to manage applications created by public users.

You can locate the application and basic information about the application using the following information:

Page Element	Description
Application	<p>View the application ID, application type, and status.</p> <p>Review the application status, for example, Payment Pending, Submitted, Pending, Permit Issued, and so on.</p>
Property	<p>View parcel information.</p> <p>Review the parcel information, including the street address, if available.</p> <p>The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.</p>
Description	<p>View the description of the application entered on the application form or on the Overview page in the permit or planning application details.</p>
Submission Information	<p>Review the user name of the person who filled out the application and the date the application was created. For example, the application was Created by John Doe on 12/20/2018.</p> <p>Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, Applicant: Rita Johnson.</p>
Planner	<p>View the planner assigned to a planning application. This field appears only on the Planning Applications list.</p>
Fees	<p>Review the total fees that may be applicable to the permit or planning application and a fee balance if the total has not been paid.</p>
	<p>Select the Pay button to submit a payment on behalf of the applicant.</p>
	<p>Select the Resubmit button to resubmit an application.</p> <p>The application status is Pending Submit because there may be a problem initiating workflow. Click the Resubmit button to retry initiating workflow.</p> <p>Resubmitting the application does not affect the fee calculations.</p>
	<p>Select the Actions button to access the option for canceling an application. The button appears only when the application has a pending status.</p> <p>Click Cancel Application to cancel an application with a pending or payment pending status.</p>

Identifying Transactions Page Icons

The icons on the Transactions page help you identify application activity as described in the following table:

Icon	Description
	Indicates that there was an error during the submittal process and the application status is pending submittal. There may be a problem initiating workflow. Click the Resubmit button to retry initiating workflow.
	Indicates that the permit or planning application is part of one or more projects. For more information, see Viewing Project Summaries .
	Indicates the planning application is classified as a pre-application.
 (Hold)	Indicates that a condition has been placed on the application. Conditions are set up by the agency and include these: <ul style="list-style-type: none"> • Hold • Lock • Notice For more information about conditions, see Applying Conditions to Applications .
 (Lock)	
 (Notice)	

Starting or Updating an Application

As agency staff, you can start new applications or update existing applications. Only agency staff can update applications that have already been submitted.

If an application has a pending status, the applicant can make updates to the application. When the applicant selects a pending permit or planning application on their Applications list page, the service directs them back to the application form.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. To create a new application, click the **Apply** button to access the questionnaire and submit the application.
3. To update an existing application, click the row for the selected application to open the pages comprising the details.
4. Go to the page for the information of the existing application that you would like to update, using the links in the left navigation panel. The actions vary by your role and the specific page.

For more information, see [Starting an Application](#).

Canceling a Pending Application

Agency staff and registered public users can cancel an application with a Pending or Payment Pending status on the Transactions page using the **Cancel Application** action button.

For more information about canceling a pending application, see [Canceling an Application](#).

Entering Application Fee Payments

Applicants typically pay their fees online using the payment cart, but if needed, you can initiate a payment on behalf of the applicant using the **Pay** button on the Transactions page.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the **Pay** button for the selected application with an outstanding fee balance.
3. When using the **Pay** button, you bypass the payment cart and go directly to the Checkout page in payment services.

For paying fees from the Fees and Payments page in the application details, see [Working with Fees and Payments](#).

Accessing Application Details

You can access application details from the Transactions page.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the selected application on the Transactions page.

The Overview page for the application appears in the content pane of the details page.

For more information about the overview of permit details, see [Viewing the Permit Summary](#).

For more information about the overview of planning application details, see [Viewing the Planning Application Detail Overview](#).

Canceling an Application

Agency staff and applicants can cancel applications in a pending or payment pending status that have not yet been submitted.

CAUTION: When you cancel a pending application, the action is permanent. There isn't any way to restore a canceled application.

The system status for the application changes from Pending or Payment pending to Voided.

For information about withdrawing an application that was submitted and is already in progress, see [Withdrawing an Application](#).

This example illustrates the Transactions page, where agency staff can delete an application. The steps are described in the following text. The **Cancel Application** link is called out with a red box.

Transactions

Permits Planning Applications All

Apply [Download Icon]

Search [Magnifying Glass] [Filter] [Sort] [List] [Calendar] [Location]


Application	Property	Description	Submission Information	Fees	Actions
ZPER-FEN-2019-00550 ZPERRecordIns Inspection	3904, Cabell Avenue, Arlington, US-VA		Created by Joe Green today Applicant: Peter Skate	No fees	
ZPER-FEN-2019-00008 Axlttest190401190615 Payment pending	No parcel information exists		Created by Joe Green today Applicant: Peter Skate	Fees Balance	306.93 USD 306.93 USD [Print] [More]
ZPER-FEN-2019-00549 ZPERRecordIns Inspection	3904, Cabell Avenue, Arlington, US-VA		Created by Joe Green today Applicant: OATS Auto	No fees	Cancel Application

Canceling Pending Applications

The agency or applicants can cancel or void a pending or payment pending permit on the Transactions page for agencies or on the Applications page for registered public users. Registered public users can only cancel one of their own applications, Agency staff must have the correct access to cancel applications.

To cancel an application:

1. Select **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, find the permit or planning application with a pending or payment pending status that you want to cancel.
3. Click the **Actions** icon in the row of the application you want to cancel.
4. Click **Cancel Application**.
5. On the Cancel Application page, enter your reason for permanently canceling the application.
6. Click **OK**.

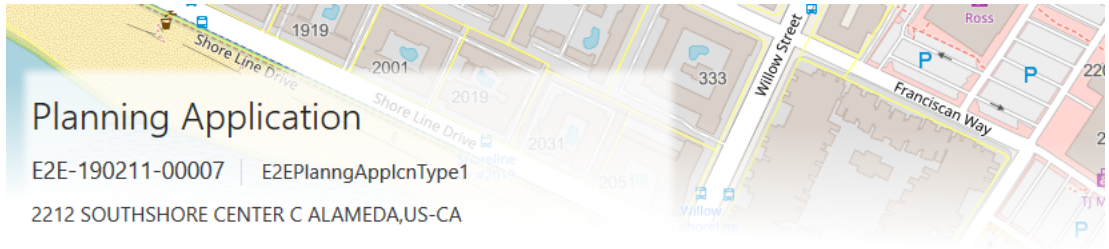
 **Note:** When you cancel an application, the system also cancels any plan reviews that are associated with the application.

Navigating to Planning Application Details

You find detail pages in a collection that consolidates all aspects of a planning application, including contacts, communication, property information, fees and payments, workflow, and more.

The planning application detail pages include the functionality you need to manage a planning application throughout its lifecycle.

This example illustrates the navigation panel with links for accessing planning application detail pages. The links are described in the following table.



<<

- Overview
- Property Information
- Workflow
- Planning Application Information
- Application Details
- Hearing
- Contacts
- Conditions
- Attachments
- Comments
- Fees and Payments
- Projects
- Communications
- Additional Information >

E2EPlanngApplcnType1 Permit

Site and Zoning

- Planning Case Required
- Required Planning Case Type
- Total Acreage
- Disturbed Acreage
- Base Flood Elevation
- In Flood Zone
- Flood Zone

To access the planning application detail pages:

1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application.
3. Navigate to planning application information using the links in the left panel.

The information for a planning application comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected planning application with links to more detail. See Viewing the Planning Application Detail Overview .
Property Information	View parcel data from the planning application and a map of the parcel location. See Working with Property Information .

Page Name	Description
Workflow	<p>View the workflow status of each task as defined by the agency using Oracle Autonomous Integration Cloud (OIC).</p> <p>See Using Workflow and Managing Tasks.</p>
Review Summary	<p>Displayed for pre-applications only. Review the list of the required planning applications and comments entered by the assigned agency planner. On this page, the applicant creates links to existing applications based on the list in the required application summary.</p> <p>See Working with Review Summary.</p>
Application Details	<p>Review information captured during the application intake that is specific to the planning application type. For example, for site and zoning, whether a planning case is required and the case type, land zoning and use information, acreage, flood information, parking</p> <p>See Viewing Application Information.</p>
Meetings	<p>Review information about pre-application meetings and schedule meetings.</p> <p>See Working with Pre-Application Meetings</p>
Hearing	<p>Review information about public hearings, such as schedule and decisions.</p> <p>See Working with Public Hearings.</p>
Contacts	<p>Review and add contacts for the planning application.</p> <p>See Adding Contacts to Applications.</p>
Conditions	<p>Review conditions placed on the planning application or person that must be resolved to complete the planning application process.</p> <p>See Applying Conditions to Applications.</p>
Attachments	<p>View a list of files and upload or download documents on this page.</p> <p>See Working with Application Attachments</p>
Comments	<p>Review or add comments pertaining to this planning application.</p> <p>See Working with Application Comments.</p>
Fees and Payments	<p>Review fees assessed and payments due. You can also add additional fee items and pay fee items from this page.</p> <p>See Working with Fees and Payments.</p>
Projects	<p>View the summary of projects associated with a planning application. The planning application can be assigned to multiple projects.</p> <p>See Viewing Project Summaries.</p>
Communications	<p>View a list of communications associated with this planning application and send ad hoc email messages and notifications.</p>

Page Name	Description
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See [Working with Ad Hoc Communications](#) and [Working with Application Communications](#).

Viewing the Planning Application Detail Overview

You view a summary of the planning application on the Overview page, where you get a snapshot of the information regarding a planning application with links to more detail.

When you access the details for a planning application, you see a summary of the application activity. This information is updated to show the latest activity.

As agency staff, you can also assign planners to a planning application and withdraw an in-progress application on the Overview page. Both agency staff and the applicant can add a description of the application.

This example illustrates the Overview page of the planning application details, which is described in the following text.

Planning Application
 ZPZ-SITE-2019-00114 | ZPZRecordType

Overview

Status: **Submitted** [Withdraw Application](#)

Submitted By: Joe Green
 Completed Date:
 Submission Date: 3/27/19
 Expiration Date: [Update](#)
 Description: [Add](#)

Applicant
[View Details](#)

Name: OATS Auto
 Phone: +1 (925) 694-3000
 Email: oats.auto@oracle.com
 Address: 5815 Owens Drive
 City of San Francisco, US-CA, 94133

Workflow
[View Details](#)

Workflow Task	Status	Assigned To	Last Updated	Duration in Days
Assign Planner	In Progress	PlanningAssistant	3/20/19	14

Fees and Payments
[View Details](#)

Total Paid: 0.00 USD
 Total Due: 591.28 USD
 Last Payment: 0.00 USD
 Last Payment Date:

Using the Overview Page

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the selected application to open the Overview page.
3. On the Overview page, review details or enter the following information in the **Overview** section:

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

Status	Review the application status.
---------------	--------------------------------

Page Element	Description
Completed Date	Review the date the application was completed.
Planner	<p>Review the name of the planner assigned to the planning application.</p> <p>Only agency staff can assign or reassign a planner to the application by clicking the Assign or Reassign link, respectively.</p> <p>Click the Planner Assignment History icon next to the Planner field to view a history of planner assignments.</p>
Description	Enter a description of the application by clicking the Add link in the Description field. The agency staff or applicant can add a description.
Submitted By	Review the name of the person who submitted the application.
Submission Date	Review the date the application was submitted for processing.
Expiration Date	<p>Review the expiration date of the application.</p> <p>Only agency staff can click the Update link next to the Expiration Date field to manually enter an expiration date for the application.</p>
Withdraw Application	<p>Click the Withdraw Application button to change the application to a withdrawn status. When you withdraw an application, any scheduled pre-application meetings or public hearings are canceled.</p> <p>For more information about withdrawing an application, see Withdrawing an Application.</p>

- On the Overview page, review information about the selected application in the sections and navigate to more details.

Page Element	Description
Applicant	<p>View the applicant's name and contact information.</p> <p>Click the View Details link to open the Contacts page. For more information about contacts, see Adding Contacts to Applications.</p>
Workflow	<p>View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status.</p> <p>Click the View Details link to open the Workflow page. For more information about workflow, see Using Workflow.</p>
Fees and Payments	<p>View the total fees paid, amount due, and the date and amount of the last payment.</p> <p>Click the View Details link to open the Fees and Payments page. See Working with Fees and Payments.</p>
Projects	View the projects to which this permit or planning application belongs.

Page Element	Description
	Click the View Details link to open the Projects page, where you can see the list of projects in more detail. Click the Project ID link to find out more about the project, which may contain other permits or planning applications. See Viewing Project Summaries .

Withdrawing an Application

Only agency staff can withdraw applications that have been submitted for processing and are in progress.

Agency staff can withdraw applications with a system status of Submitted or in-progress statuses on behalf of an applicant. An applicant can't initiate an application withdrawal in the system.

You can withdraw permit applications with one of these statuses:

- Submitted
- In Progress
- Plan Review
- Permit Issued
- Inspection

And you can withdraw planning applications with one of these statuses:

- Submitted
- In Progress
- Hearing

When you withdraw an application that is in progress, the system also cancels or withdraws any of the following that are associated with the application:

- Open permit inspections
- Open plan review cycles and reviewers
- Scheduled pre-application meetings
- Scheduled public hearings

The system status of the application changes to Withdrawn.

For information about canceling an application that hasn't been submitted yet and is still in a pending status, see [Canceling an Application](#).

Withdrawing In-Progress Applications

You withdraw an application on the Overview page in the application details. Agency staff must have the correct permissions to withdraw an application.

To withdraw an application:

1. Select **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application that you want to withdraw.

3. On the Overview page, click the **Withdraw Application** button.
4. On the Withdraw Application page, enter the reason for withdrawing the application.
5. Click **OK**.

Working with Planners

You assign and reassign planners to a planning application and access the planner assignment history on the Overview page of the planning application details.

This example illustrates the Assign Planner page, when the agency staff is assigning a planner from the available planners in the list. The steps are described in the following text.

Assign Planner

PreApp-2019-00008
PreAppMeeting

The assigned planner is Susan Anderson.

Planner List		History
Name	Job Title	
<input type="checkbox"/> Andy Jones	Plan Coordinator	
<input type="checkbox"/> Angela Williams	Permit Technician	
<input type="checkbox"/> Black Swan	Planning Assistant	
<input checked="" type="checkbox"/> Susan Anderson	Principal Planner	

The list of available planners is limited to the agency staff that have the Planner job function, which is defined on the Agency Staff page. The planner must also be assigned to the planner Job Function Attribute for Planning Application Types within the Planner job function.

Assigning a Planner

1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application on the Transactions page.
3. On the Overview page, click the **Assign** link in the **Planner** field.


If a planner has already been assigned, you can click the **Reassign** link to select a different planner.

4. Select the check box for the planner to assign them to the planning application.
5. Click **Save** to save your selection.

Viewing Planner Assignment History

You can view the planner assignment history on the Assign Planner page after one or more assignments have been made.

1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application on the Transactions page.
3. There are two ways to view the planner assignment history on the Overview page:

Page Element	Description
	Click the History icon next to the Planner field to open the Planner Assignment History page.
Reassign	Click the Reassign link next to the Planner field and currently assigned planner's name to open the Assign Planner page. Click the History tab.

4. View a list that includes past planner assignments, the dates they were assigned, and the planner currently assigned to the planning application, if any.

Related Topics

- [Viewing the Planning Application Detail Overview](#)

Working with Property Information

Property information shows parcel data from the permit or planning application and a map of the parcel location. You can add parcels, and modify or delete the parcel, owner, and address information.

Property information is configured on the application forms by the agency during the design process. When filling out an application, the public user enters information, which is then displayed in the detail pages of the permit or planning application. Only agency staff can update information on the Property Information page after an application has been submitted.

Viewing Parcel Information

You view a list of parcels associated with this permit or planning application in the **Parcel List** section. The list view displays parcel details. You can also view the location of the parcels on a map.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, view the list of parcels in the **Parcel List** section.
4. Click the parcel number button in the list to view the parcel details, owner, and address in the right pane.
5. Click the map icon to find the parcels in the list on a map.

Adding Parcels

The system automatically makes the first parcel added to the permit the primary parcel.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, click the **Search** icon in the **Parcel List** section.
4. Use the search field on the Search Property page to find parcels by parcel number, address, or owner. Only parcels enabled by the agency are available as lookup values.
5. Click the check boxes for one or more parcels.
6. Click the **Add Selected** button.

Updating Parcel Details

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, click the **Edit** button in the **Parcel Number** section.
4. On the Parcel Detail page, you can turn on the **Primary** switch to make this the primary parcel for the permit.
5. Update parcel data such as the property description, jurisdiction, subdivision, primary zone, zone description, land use, parent parcel, parcel type, book, section, page, map book page, map name, boundary description, and so on.
6. Click **Save**.

Updating Parcel Owner Details

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, click the owner row in the **Owner** section.
4. On the Parcel Owner Detail page, you can turn on the **Primary** switch to make this the primary parcel owner.
5. Enter a value in the **Zip Code** field to add address information.
6. You can also update the owner name, secondary owner name, ownership type, home phone, and email address.

Adding Parcel Addresses

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, click the **Search** icon in the **Address** section.
4. Use the search field on the Search Property page to find parcels by parcel number, address, or owner.
Only parcels associated with this permit are available as lookup values.
5. Click the check boxes for one or more parcels.
6. Click the **Add Selected** button.

Updating Parcel Addresses

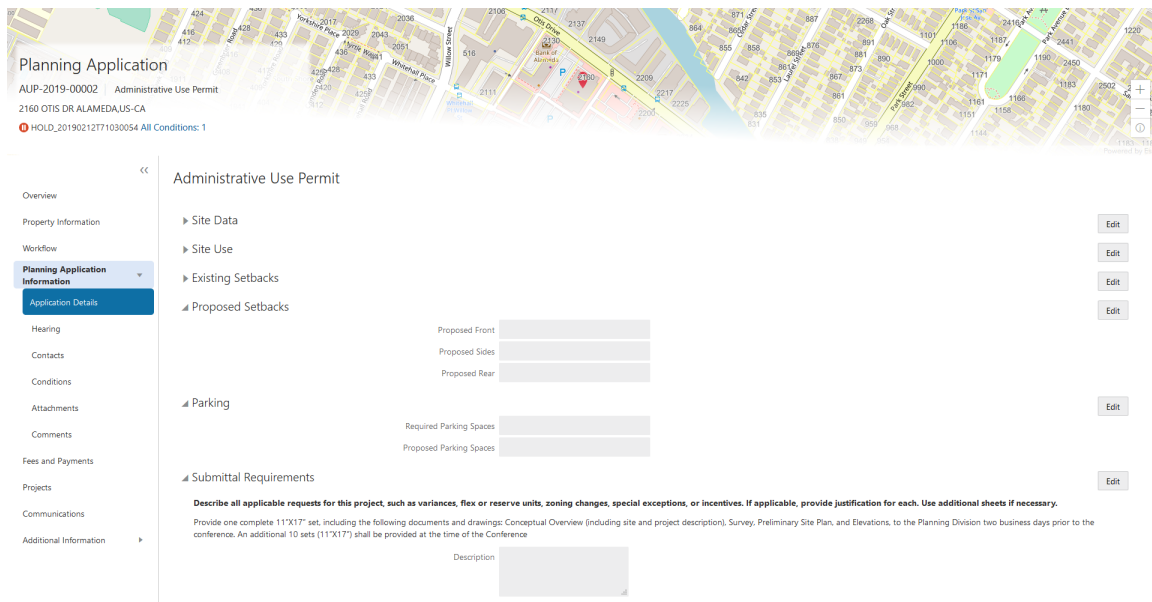
1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. On the Property Information page, click the address row in the **Address** section.
4. On the Parcel Address Detail page, you can turn on the **Primary** switch to make this the primary parcel address.
5. Update parcel address data such as address type, address line 1, address line 2, street number, street, street type, unit, floor, direction, building, municipality, and longitude and latitude.
6. Click **Save**.

Viewing Application Information

You review information captured during the application intake that is specific to the planning application type on the Application Details page. Agency staff with appropriate permissions can update the details captured from the application.

When an agency designs the intake form for a specific type of planning application, they use elements that capture the information necessary for evaluating adherence to planning and zoning requirements. For example, for a use permit, the application details might include site data, site use, existing setbacks, proposed setbacks, and parking. The application details might also include requirements for application submittal.

This example illustrates the Planning Application – Application Details page, which is described in the surrounding text.



Updating Application Details

The fields available to update depend on the fields added when the intake form was designed.

1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application on the Transactions page.
3. On the Overview page, expand the **Planning Application Information** navigation menu item in the left pane.
4. Click the **Application Details** link.
5. On the application details page, click the **Edit** button for the section you would like to edit.
6. Update available fields on the page.
7. Click the **Done** button to save.

Using Workflow

Workflow provides a defined structure for the permit and planning application lifecycles. For example, humans perform manual steps such as approving a permit application, while the workflow engine performs automated steps such as updating permit and inspection statuses.

Managing workflow tasks consists of updating the assignment, status, and priority for a task that a human performs. You can also add comments to a task and edit workflow comments.

You do not, however, use workflow functionality to perform the actual task. If workflow includes a task to review plans, you need to review the plans manually and record your plan review decision in the plan review pages. Once the plan review cycle is complete and all decisions are approved or not required, the workflow engine automatically moves the workflow to the next step. As an inspector, when you approve the final inspection, the workflow engine automatically changes the inspection task in the workflow to complete.

Workflow and Non-Workflow Tasks

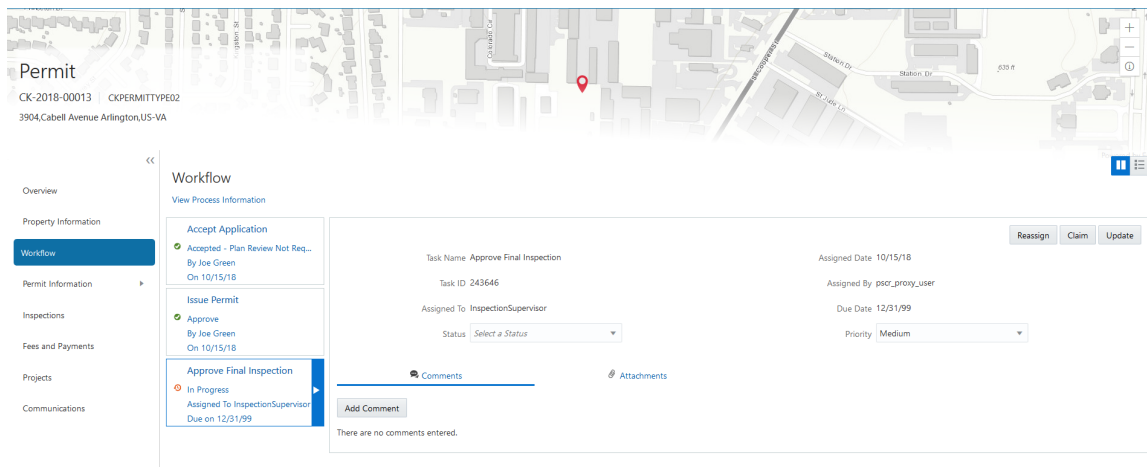
This topic discusses workflow tasks. These are tasks that are defined in workflow process definitions within Oracle Autonomous Integration Cloud (OIC). Agency staff manages these tasks using the Workflow page in the details of a permit or planning application.

Oracle provides an additional page that agency staff can use to review both workflow and non-workflow tasks. For information about this functionality, see [Managing Tasks](#).

Managing Workflow Tasks

Use the two-panel view on the Workflow page to see past and current workflow tasks and to manage task assignments, status, priority, and comments.

This example illustrates the two-panel view of the Workflow page, which is described in the following text.



Note: You can update or assign a task only if it is in progress. You can add comments to tasks that are complete, but you cannot make other changes. You cannot make any changes to a task that is not started.

To manage a workflow task:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links on the left side of the screen to select **Workflow**.

The Workflow page appears on the right side of the page. This page can be toggled between a two-panel view and a list view. The list view is display-only and visible to both agency staff and registered public users; the two-panel view is for agency staff only. The default two-panel view includes the following:

Panel	Description
Task summary cards on the left.	<p>The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information:</p> <ul style="list-style-type: none"> ○ Task name ○ Task status <p>Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always In Progress. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks.</p> <ul style="list-style-type: none"> ○ Assignee <p>Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task.</p> <ul style="list-style-type: none"> ○ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	<p>The right panel displays more details for the task that is selected in the left panel.</p> <p>If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments.</p> <p>Completed tasks are not updatable, but you can add comments to them.</p>

4. Select a workflow task from the left frame to see details in the right frame.
5. Review read-only task information.

These fields are not updatable regardless of the task status:


Page Element	Description
Task Name	The task name as defined in the OIC workflow engine. For example, the Application Acceptance task is for reviewing and accepting a permit or planning application that has been submitted.
Task ID	The identifier for this specific instance of a task. For example, multiple permits or planning applications have an Application Acceptance task, but the Task ID for accepting the application is unique for each permit or planning application.
Assigned To	The name of the individual who is assigned to the task, or, if the task isn't assigned to an individual, displays the name of the group or role that is responsible for the task.
Assigned Date	The date that the task assignment was last updated.

Page Element	Description
Assigned By	The name of the person who last updated the task assignment. When an assignee claims a task, the Assigned To and Assigned By names are the same.
Due Date	The date by which the task must be completed. The workflow process definition in OIC sets the due date. Generally the due date is defined as a specific amount of time after the task is started.

6. If the task is in progress, you can reassign it using these buttons:

Page Element	Description
Reassign	Click to choose an assignee for the task. See Managing Tasks .
Claim	Click to assign the task to yourself. This button is visible only for tasks that are assigned to a group rather than to an individual.
Release	Click to remove yourself as the task assignee. The task is reassigned to its default group so that group members can see and claim the task. This button is visible only for tasks that are assigned to you.

7. To update the status or priority of an in progress task, use these fields:

Page Element	Description
Status	Select a status that represents the final outcome of the task. The task statuses depend on the workflow setup. For example, the available statuses for a task that requires a simple approval might be Approve and Reject. The workflow status of each task is defined by the agency using OIC. Other tasks might require different statuses. The sample workflow that Oracle provides includes these statuses for the task where you review an application: Accepted - Plan Review Not Required, Accepted - Plan Review Required, More Info Needed, and Reject.  Note: Task statuses are not the same as application status. However, the workflow engine can update the application status based on the outcome of a task.
Priority	Set the priority to High, Medium, or Low. The priority is informational only.

8. Click **Update** to save your changes.

When you save your changes, the system does the following:

- Sends an update to the workflow engine in OIC, triggering any subsequent tasks in the workflow.

For example, in a delivered sample workflow, approving a permit application triggers an update to the permit status, which triggers an email to the applicant. The workflow then reaches a decision point that checks whether a plan review is required. The next human step in the process is either completing a plan review or, if no review is required, issuing the permit.

- Refreshes the Workflow page, which becomes read-only if the task is complete.
- Displays a **Refresh** icon on the read-only page so that you can check if any new human workflow tasks get triggered.

9. Click **Refresh** to update the page and see if the completion of the task has triggered another workflow task for the application.

Processing time can vary, so you might need to wait before refreshing the page.

Adding Comments to a Workflow Task

Comments are a useful mechanism for adding information to a workflow task. You can control whether the comment is visible to public users who view their application workflow. The default setting is for comments to be visible, so you must manually hide comments that you do not want the public user to see.

For more information about comments, see [Working with Application Comments](#).

To add a comment to a task:

1. Access the workflow task.
2. Click **Add Comment**.
3. To write a new comment from scratch, enter and format your comment in the rich text field on the page.
4. To create a new comment based on one or more existing comments:
 - a. Click **Select Comments**.
 - b. On the Select Comments page, click **Favorite**, **Standard**, or **Recent** to see the corresponding list of comments.
Favorite, standard, and recent comments are described in the topic [Working with Application Comments](#).
 - c. Locate and select the comments you want to copy, using the search and filter options as needed.
 - d. Click **Insert** to copy the text of the selected comments into the field for the new comment.
 - e. If necessary, modify the copied text.
5. If you want to hide the comment from public users, click the **Hide from Public** icon to toggle the visibility setting. When the icon displays an open lock, the comment is visible to the public. This is the default setting for new comments.
When the icon displays a closed padlock, the comment is hidden from the public.
6. Click **Save** to save the comment and return to the Workflow page.

Modifying a Comment in a Workflow Task

To modify a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Modify the text of the comment as needed.
if you use the **Select Comment** option to add text from an exiting comment, the new text is added after any existing text.

4. To modify the comment visibility, click the **Hide From Public** icon.

Clicking the icon toggles the setting. When the icon displays an open lock, the comment is visible to the public. When the icon displays a closed padlock, the comment is hidden from the public.

5. Click **Save** to save changes and return to the Workflow page.

Deleting a Comment from a Workflow Task

To delete a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Click the **Delete** icon.

The comment is deleted, the window closes, and you return to the Workflow page.

Managing Attachments for a Workflow Task

You can upload files to attach them to specific workflow tasks. File that you associate with a workflow task are visible only on the detail page for that task. That is, workflow attachments are not visible on the general Attachments page for an application.

To manage attachments for a workflow task:

1. Access the workflow task.
2. Click the **Attachments** link to display attachments information.

The **Attachments** link and **Comments** link toggle the display between task comments and task attachments. In Attachments view, a grid displays the **File Name**, a **Description**, and the **File Size** for each attachments.

3. To add a new attachment:
 - a. Click **Add**.
 - b. Select a file using your browser's file selection window.
 - c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
 - d. Click **Upload**.

When the upload is complete, the new attachment appears in the workflow task details.

4. To view or modify attachment information:
 - a. Click the **Actions** icon for the existing attachment.
 - b. Select **View Details**.
 - c. On the Attachment page, review the **File Name**, **File Size**, and the **Last Updated By** and **Uploaded By** user names.
 - d. Optionally update the **Description**.
 - e. Click **Save** or **Cancel** to return to the Attachments page.
5. To download a file, click the **Actions** icon and select **Download**.
6. To delete a file, click the **Actions** icon and select **Delete**.


You are prompted to confirm the deletion.

7. To close the Attachments window, click **Cancel**.

Viewing the Overall Workflow for an Application

Use the list view on the Workflow page to view all of the workflow tasks that a human must perform for a specific permit or planning application. This list does not include system tasks such as updating the application status and sending automated notifications.

The list includes completed, in progress, and not started steps. Showing all of these steps together provides a big-picture view of the process. However, some steps that are not yet started might not be applicable depending on the workflow path.

 **Note:** Unlike the two-panel view, the list view is visible to registered public users who access information for their application. The list view is read-only, so public users are never able to update tasks.

To use the list view:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Show List View** icon.
5. Review the task list.

The task list displays:

- o The **Task Name** and **Status**.
- o The **Last Updated Date**.
- o The **Days Taken**, which represents the number of days elapsed while the task is in progress.

The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.

- o **Comments**, which displays the two most recent comments.

For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.

6. To review task history, click a specific task to open the Task Details page.

This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.

7. Close the Task Details page to return to the workflow list view.

Altering Workflow

If needed, supervisors or administrators can change the workflow for a transaction type manually. This enables you to change the workflow step in the case of system outage or user error, for example.

To alter workflow:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Alter Workflow** button.
5. On the Alter Workflow make these changes:
 - o **New Workflow Activity Name:** Select the desired workflow step.

- o **Update Transaction Status:** Select the proper status for the workflow step.
 - o **Comments:** It is recommended to note who made the change and describe the circumstances requiring the manual intervention.
6. Click **Save**.

Managing Tasks

The Task Management page enables you to review both workflow and non-workflow tasks and to reassign tasks (including claiming a task for yourself).

Application-related tasks include workflow tasks related to the overall permit lifecycle and inspections as well as non-workflow tasks related to plan reviews. They also include workflow tasks related to the planning application lifecycle.

Reviewing and Managing Tasks

1. On the agency springboard, select the **My Workflow** tile.
2. On the Task Management page, select the tab that lists the tasks that you want to review:

Task Tab	Description	Available Actions
My Workflow	Lists tasks that are assigned to you.	Release Reassign
Group Workflow	Lists workflow tasks that are assigned to a group to which you belong. Non-workflow tasks (plan review tasks and inspection tasks) do not appear here. Tasks on the Group Tasks tab are not assigned to individual group members. So this list functions as a group work queue from which individuals can claim specific workflow tasks. When a task is claimed, it is assigned to the individual and no longer appear in the list of group tasks.	Claim Reassign
All Workflow	Lists all tasks assigned to groups to which you belong, including tasks that are assigned to you and to other group members.	Reassign

3. Use the search, filter, and sort options to refine the list of tasks as needed.
4. Use these fields to review task information:


Page Element	Description
Task Type	Identifies the nature of the task to be performed. Values include: <ul style="list-style-type: none"> o Inspection

Page Element	Description
	<ul style="list-style-type: none"> Plan Review Workflow <p>The Workflow task type represents overall permit workflow.</p>
Transaction	Displays the transaction type number. For example, in the case of a permit, it displays the permit number and permit type for the associated permit.
Tasks	<p>Displays a task name and identifier that depend on the task type:</p> <ul style="list-style-type: none"> For workflow tasks, the workflow process name and task ID appear. The task ID is for the specific instance of the task. For inspection tasks, the inspection name and ID appear. For plan review tasks, the plan review name and cycle count appear.
Status	Displays the task status. Different types of tasks can have different statuses. For example, inspection tasks can have the status Scheduled, which is not applicable to permit workflow tasks.
Assignment	Displays the date that the task assignment was last updated and to whom the task is assigned.
>	Click to access details for the permit to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.

- To update the task assignment, select one of these options from the task's **Actions** menu:
 - Claim** assigns the task to yourself. This action is available only for tasks that are currently assigned to a group. It is not relevant on the
 - Release** removes the assignment without assigning a new owner. The task will now appear on the Group Task list until it is claimed or reassigned.
 - Reassign** opens the Reassign Task page, where supervisors can select a new assignee.

Reassigning a Workflow Task

Claiming a workflow task is a quick shortcut for assigning a task to yourself. To assign a task to someone else, though, you must use the Reassign action.

 **Note:** Only supervisors can reassign tasks. For example, agency staff members with the role PSC Permits Supervisor can reassign tasks, however, agency staff members with the role PSC Permits Technician cannot.

To reassign a workflow task:

- On the agency springboard, click the **My Workflow** tile.
- Locate the workflow task on either the **My Workflow** list, the **Group Workflow** list, or the **All Workflow** list. Use the search, filter, and sort options to help you refine the task list.
- Click the **Actions** icon, and then select **Reassign**. The Reassign Task page appears.

4. Confirm that the **Search By** value is User.
5. Enter your search criteria, then click **Search**.

You can search by **Keyword, First Name, Last Name,** and **Email**.

6. Locate the desired assignee in your search results, then click the **Select** button for that assignee.

The system prompts you to confirm the assignment, then reassigns the workflow task and returns you to the task list.

Working with Pre-Application Meetings

A pre-application meeting is scheduled between the registered public user who has submitted a pre-application and the agency assigned planner – to review and discuss the requirements of the project.

Applicants and authorized Public Sector Cloud agency staff are allowed to schedule pre-application meetings. The authorized staff include the planning assistant, zoning administrator, principal planner, and the associate planner.

Administrators configure the system to enable the applicants and the agency staff to schedule meetings – using the Manage Pre-Application Meeting Configuration page. See [Managing Pre-Application Meeting Configuration](#).

Scheduling a Pre-application Meeting

You schedule a pre-application meeting on the Pre-application Meeting Request page. Applicants can also schedule a meeting depending on the scheduling configuration on the Manage Pre-Application Meeting Configuration page. See [Managing Pre-Application Meeting Configuration](#).

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to schedule a meeting. The pre-application details page opens.
3. Click **Planning Application Information** in the left panel.
4. Click the **Meetings** link to view the Pre-application Meetings page for the pre-application.
5. Click the **Schedule Meetings** button.
6. On the Pre-application Meeting Request Page, select values for the following mandatory fields:

Page Element	Description
Scheduled Date	Select a date to schedule the meeting. The dates available for scheduling your meeting are based on the configuration on the Manage Pre-Application Meeting Configuration page, and the agency's holiday calendar. See Managing Pre-Application Meeting Configuration .
Scheduled Time	Select the start time of the scheduled meeting. The time values available for scheduling your meeting are based on the configuration on the Manage Pre-Application Meeting Configuration page. See Managing Pre-Application Meeting Configuration .
Meeting Duration in Hours	View the duration of the meeting, which is set up by your administrator on the Manage Pre-Application Meeting Configuration page. See Managing Pre-Application Meeting Configuration .

- Click the **Schedule** button to schedule the meeting and return to the Pre-application Meetings page. You can view the record of the meeting you just scheduled.

An online notification and email are sent to the applicant and to the assigned agency planner, with the schedule of the meeting — depending on the setup in the Communication template.

Viewing Pre-application Meetings

Agency staff and registered public users view a list of pre-application meetings on the Pre-application Meetings page.

Agency planners can use the Planning Calendar page to view all the pre-application meetings scheduled at the agency level or just view their own meeting schedules. See the next section for details about the Planning Calendar page.

To view pre-application meetings :

- Select **Planning Applications** on the Agency Springboard.
- Click the **View Details** button for an application to access the application details.
- Click **Planning Application Information** in the left panel.
- Click the **Meetings** link to view the Pre-application Meetings page for the application.
- On the Pre-application Meetings page, view the list of pre-application meetings, including this information:



Page Element	Description
Meeting Date	View the date of the scheduled meeting.
Meeting Start Time	View the start time of the scheduled meeting.
Meeting Duration in Hours	View the duration of the scheduled meeting.
Meeting Status	View the status of the meeting, such as Canceled or Scheduled.
Reschedule	Click to change the meeting date and time.
Cancel	Click to cancel the scheduled meeting.

Viewing Pre-application Meetings on the Planner Calendar

Agency assigned planners such as the planning assistant, zoning administrator, principal planner, and the associate planner can view their own pre-application meeting schedules or all the pre-application meeting schedules for the entire agency.

- Select the **Planner Calendar** tile on the Agency Springboard.
- On the Planner Calendar page you can view the details of the meeting schedule, including a link to access the planning application.
- On the Planner Calendar page you can perform these actions:

Page Element	Description
View	Select one of the options to view the pre-application meeting schedules: <ul style="list-style-type: none"> My pre-applications (Default)

Page Element	Description
	<ul style="list-style-type: none">All pre-applications
	Select to view the meeting schedules on a calendar. You can choose to view the calendar by month, week, or day. This view is the default selection.
	Select to view the meeting schedules in a list format. You can use the Sort By, Search, and the Filter options to refine your search results.

Rescheduling a Pre-application Meeting

You reschedule a pre-application meeting on the Pre-application Meeting Page. Applicants can reschedule their meetings only if the administrator has enabled the settings on the Manage Pre-Application Meeting Configuration page. See [Managing Pre-Application Meeting Configuration](#)

1. Select **Planning Applications** on the Agency Springboard.
2. Click the **View Details** button for an application to access the application details.
3. Click **Planning Application Information** in the left panel.
4. Click the **Meetings** link to view the Pre-application Meetings page for the application.
5. On the record of the meeting you want to reschedule, click the **Reschedule** button.
6. On the Pre-application Meeting Request page you can select new values for the fields and click **Schedule**.
7. The Pre-application Meeting page now lists the newly scheduled meeting record and the previous meeting record shows with a status of Canceled.

An online notification and email are sent to the applicant and to the assigned agency planner, with the updated meeting schedule — depending on the setup in the Communication template.

Canceling a Pre-application Meeting

You cancel a pre-application meeting on the Pre-application Meeting Request Page.

1. Select **Planning Applications** on the Agency Springboard.
2. Click the **View Details** button for an application to access the application details.
3. Click **Planning Application Information** in the left panel.
4. Click the **Meetings** link to view the Pre-application Meetings page for the application.
5. On the record of the meeting you want to cancel, click the **Cancel** button.
6. Click OK to confirm. The Pre-application Meeting page now lists the meeting record with a status of Canceled.

An online notification and email are sent to the applicant and to the assigned agency planner, that the meeting has been canceled.

Notification and Email Correspondence

When an assigned planner or the applicant schedules or cancels a meeting, the applicant and the assigned planner can receive a notification or email, depending on the setup in the Communication template. For an understanding of how the templates are defined to enable the notifications, see [Working with Application Communications](#).

Working with Review Summary

Agency planners determine the applications that are required to be submitted by the applicants, based on the nature of the project they discuss during the pre-application meeting.

Applicants and agency staff review the summary information and comments entered by their assigned agency planner on the Review Summary page and proceed with creating and linking the required applications.

Adding a Required Application

As an agency assigned planner you add application types to the Review Summary page, where the applicants can review and take appropriate actions such as linking an existing application or creating a new application.

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to add the required applications. The pre-application details page opens.
3. Click **Planning Application Information** in the left panel.
4. Click the **Review Summary** link to access the Review Summary page, which lists all the required application types added for the submitted planning application.
5. Click the **Add** button to open the Required Application page and enter values for the following fields:

Page Element	Description
Application Type	Use the look-up prompt to select a type of application that you want add.
Comment	Enter text such as, to indicate to the applicant why the particular application is required along with any additional information.

6. Click **Save** to return to the Review Summary page. You will now see the row you just created, with a status of Not Started.

Adding a Review Comment


As an agency assigned planner you add review comments to the Review Summary page, where the applicants can view the detailed information you have entered regarding the pre-application meeting outcome.

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to add your review comment. The pre-application details page opens.
3. Click **Planning Application Information** in the left panel.
4. Click the **Review Summary** link to access the Review Summary page.
5. In the Review Comments section, click the **Add Comment** button to open the Add Comment page and enter text. You can use the **Rich Text Editor** option for formatting your comment.
6. Click **Save**.

Viewing the Review Summary

To view the summary information:

1. Select **Planning Applications** on the Agency Springboard.
2. Click the **View Details** button for an application to access the application details.
3. Click **Planning Application Information** in the left panel.
4. Click **Review Summary** in the left panel to open the Review Summary page.
5. In the Required Application section, view a list of application types that are required for your submitted planning application. Find additional information:

Page Element	Description
Application Type	View the type of application required.
Status	View the status of the application type. For example, Not Started and Inspection. The Not Started status Indicates that no application has been created or linked for the identified application type.
Comments	View the comments included by the planner regarding the application type.
Action	Select an action you want to perform on the transaction: <ul style="list-style-type: none"> ○ Link Application ○ Create Application ○ Edit Comments (Available only to Planner) ○ Delete (Available only to Planner) <p> Note: The options available in the Action menu depends on the user logged in. For details on the Action links, see the following section - Performing Actions for Required Applications.</p>

6. In the Review Comments section, view a list of review comments entered by the assigned planner of your pre-application. Only planners can create and edit the review comments.

Performing Actions on Required Applications

Applicants and agency staff can perform actions on the required applications that are added by the assigned agency planner. Applicants can create a new application, link and unlink an existing application, and edit the comments they have entered. Agency staff can additionally delete a required application record.

1. Select **Planning Applications** tile on the Agency Springboard.
2. Click the **View Details** button for an application to access the application details.
3. Click **Planning Application Information** in the left panel.
4. Click **Review Summary** to access the Review Summary page, which lists all the required application types added for the submitted planning application.
5. Select an application row and click **Action**. You can perform the following actions:

Page Element	Description
Link Application	<p>Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click Save. The Review Summary page now lists the application you just selected. You can click the application link to open the Overview page of the planning application.</p> <p>The Action menu for the row allows you to:</p> <ul style="list-style-type: none"> Remove the link from the application by using the Remove Application Link option. Edit the comments you have entered by using the Edit Comments option, which opens the Required Application page. This option is available only to the planner.
Create Application	<p>Click to open the Create Application page, enter the required details, and save. The new application is created. Navigate to return to the Review Summary page, click Action and then select Link Application. Select the application you just created and click Save to return to the Review Summary page.</p>
Delete	<p>Click to delete the application row.</p>

Working with Public Hearings


The Public Hearing pages include a consolidated list of hearings related to a planning application. As an agency planner, you manage the hearing activity of an application – including viewing hearing schedules and decisions, scheduling hearings, and taking actions such as an appeal or to cancel a hearing.

As a registered public user, you use the Hearings page to view a complete list of hearings for a planning application.

Viewing Public Hearing for a Planning Application

To view a public hearing:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application for which you want to add a hearing.
3. On the Planning Application page, click **Planning Application Information** in the left panel.
4. Click the **Hearing** link under **Planning Application Information** to view the Hearings page.

 **Note:** You should first ensure that hearings are applicable to the application you have selected. Navigate to the Planning Application Type page by selecting **Planning and Zoning Setup > Planning Application Type** and in the **Hearing** field select the value **Applicable**.

5. The Hearings page lists all the scheduled hearings, including the following information:


Page Element	Description
Hearing Date	<p>View the date on which the hearing is scheduled. If there is no date displayed, the hearing is in the Not Scheduled status. You can schedule a hearing for your application using the Schedule option under the Action menu.</p>

Page Element	Description
Hearing Body	View the hearing body that will evaluate the application.
Schedule Status	View the status of the schedule: <ul style="list-style-type: none"> ○ Not Scheduled ○ Tentative ○ Final ○ Canceled
Hearing Status	View the status of the hearing: <ul style="list-style-type: none"> ○ Not Started ○ Completed
Hearing Decision	View the decision made by the hearing body.
Action	The options under this menu is determined by several factors such as the user logged in, the schedule status, the hearing status, and the hearing decision. For details about the Action menu, see the next section - Scheduling and Finalizing a Public Hearing.


Scheduling and Finalizing a Public Hearing

Agency planners schedule and manage hearings related their assigned applications using the Hearing Scheduler. The Hearing Scheduler page provides a summarized, consolidated view of hearing schedules across hearing bodies and the list of planner assigned applications ready for scheduling. You can access the Hearing Scheduler page using one of the two selection methods:

- Select the **Hearing Scheduler** tile on the Agency Springboard and then select the application for which you want to schedule a hearing.
- Access the application for which you want to schedule a hearing and then add a hearing using these steps:
 - a. Select the **Planning Applications** tile on the Agency Springboard.
 - b. On the Planning Applications tab of the Transactions page, select the application for which you want to add a hearing.
 - c. On the Planning Application page, click **Planning Application Information** in the left panel.
 - d. Click the **Hearings** link under **Planning Application Information** to view the Hearings page.

 **Note:** You should first ensure that hearings are applicable to the application you have selected. On the Planning Application Type page select the value Applicable in the Hearing field (In the Navigator select **Planning and Zoning Setup** and then select **Planning Application Type**).


- e. Click **Add Hearing** on the Hearings page to open the Hearing Scheduler page. The applicable hearing bodies and their schedule dates are available for scheduling the hearing.

 **Note:** Once a hearing is scheduled, the Hearings page for the application is updated to show the new schedule.

Using the Hearing Scheduler Page

The Hearing Scheduler page allows you to perform various scheduling operations:

- Schedule a hearing for your assigned application. Drag the selected application item from the left panel onto one of the desired available dates in the calendar space. You can also click the **Schedule** button on the application item and enter schedule details.
- Reschedule a hearing for your application. Either drag and drop the application item to a new available date or use the **Reschedule** action on the scheduled application item.
- Finalize a hearing. The schedule status of each hearing appears as tentative until you finalize the hearing by using the Finalize action.

Page Element	Description
Hearing Body	Lists all the applicable hearing bodies available in the hearing hierarchy. For a selected hearing body, the left panel lists all the applications that are ready for scheduling hearings. The calendar workspace lists the dates as per the recurrence pattern set up and their corresponding hearing schedules.
	Allows you to view the previous and the next set of available schedule dates for the selected hearing body.
Select a Date	Displays the available schedule dates in a calendar view, for the selected hearing body.

Finalizing the Hearing


You use the **Actions** menu to finalize the hearing schedule. You can finalize the hearing schedule by selecting the application's action on the Hearing Scheduler page or on the Hearings page. The **Actions** menu on the Hearing Scheduler page also allows you to view the application, reschedule the hearing, and cancel the hearing schedule.

Performing Actions

The Actions menu on the Hearings page enables you to perform the following:

Page Element	Description
Edit	Click to change the hearing decision, based on the decision made by the hearing body. The values in this field are configured by your system administrator on the Hearing setup page.
Cancel	Click to cancel the hearing. The date will be made available for the other hearing schedules. This option is available based on the access permissions for the user logged in.

Page Element	Description
Finalize	Click to finalize the date you selected at the time of scheduling.
Reschedule	Click to open the Reschedule page in which you can change the schedule status and select a new hearing date for the hearing.
Generate Notifications List	Click to open the Generate Notifications List page that allows you to download a report containing the addresses within a given geographic radius. You can use the Mail Merge tool to send post cards to the selected addresses. See Generating a Hearing Notifications List .
Continue	Click if it was decided to continue the hearing. A new hearing record will be created with the same hearing body and with a schedule status Not Scheduled. You schedule the new hearing using the Schedule option under the Action menu.
Appeal	Click to escalate the application to the next higher hearing body in its hierarchy. The system automatically creates a new schedule with the next higher hearing body and with the schedule status – Not Scheduled. You manually schedule a date for the new hearing.

 **Note:**
The hearing decision made by the highest hearing body in the hierarchy is the final. The option to appeal is not available for the particular hearing.

Generating a Hearing Notifications List

After you schedule a hearing for a planning application, you can generate a hearing notifications list. This list consists of separate .csv files for parcels, owners and addresses. The list includes parcels that are at least partially within a specified distance from the one or more parcels that you select. The selected parcel is normally the parcel in the planning application, but you can override this and make your own selection.

To generate a hearing notification list:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. From the list of planning applications on the Transactions page, click a planning application to access the Planning Application page.
3. Click **Planning Application Information** in the left panel of the Planning Application page.
4. Click the **Hearing** link under **Planning Application Information** to view the list of hearings.
5. Confirm that the **Schedule Status** for the hearing is Final.

If the status is Tentative, you can finalize the status by selecting the **Actions** button for the row and choosing Finalize from the menu that appears.

6. Select the **Actions** button for the row and select **Generate Notifications List** from the menu that appears.


The Generate Notifications List page appears. It displays a map on which the parcel or parcels from the planning application are selected. Selected parcels appear as solid blue shapes.

The selected parcels are the center of the notification area. The notification area consists of all parcels that are at least partially within a specified distance of the selected parcel or parcels.

7. If the default parcel selection is not correct, modify the selection.

The selection tools are the same ones that you use on the Main Map. For detailed information on selecting parcels, see [Using the Main Map and Explore Your City Map](#)

In brief, the two selection methods are:

- o Use the search field to search by street address or parcel number, then click the desired location in the type-ahead list or the search results.
- o  Click the Show Selection Tools icon on the main map toolbar, then use selection tools such as **Draw Point**, **Draw Polyline**, or **Draw a Polygon** to select the parcels that you draw on.

8. Define the notification area by entering a distance from the selected parcels.

Enter a number, and select Feet, Miles, Meters, or Kilometers to enter a distance.

The fields for entering the distance appear below the search field as long as at least one parcel is selected.

9. Click **Apply**.

The notification area appears on the map. Visually, it appears as a bold green outline that follows the contours of the selected parcel at the specified distance. If you selected multiple parcels, there can be multiple notification areas.

If you click either the **Deselect All** tool or the **Clear** link on the Search overlay, the notification area is cleared and all parcels are deselected.

If you use the other selection tools to add or remove parcels from your selection, the notification area does not change until you click **Apply** again.

10. If you are satisfied with the notification area, click the **Download** button that becomes visible after you apply a selection.

Three files are downloaded: Address.csv, Owner.csv, and Parcel.csv.

Files are saved to default folder defined in your browser settings. Your browser must be able to download multiple files.

11. Save the .csv files so your agency can use them to generate notifications.

The notification process is not part of the Oracle system.

Adding Contacts to Applications

This topic discusses how to add contacts to an application. Users can add contacts to a permit or planning application after submittal.

Adding Contacts to an Application

The Contacts page displays the applicant details entered at the time of creating the transaction and allows you to add additional contacts to be associated with the transaction. Additional Contacts can be:

- Add from Registered Contacts: You just select a contact already registered in the system and include in the transaction .
- Add Brand New Contact Manually: You create a new contact by entering all the contact details and then include in the transaction .

 **Note:** Applicants can add additional contacts at the time of filling the transaction application.

1. Select **Permits** or **Planning Applications**. Select **Transactions** and then select a Submitted transaction row.

Select **Permit Information** or **Planning Application Information** and select **Contacts**. The Contacts page displays the applicant information in the top section and Additional Contacts option in the bottom section.

You can make changes to the following fields for the applicant information and save the record:

Salutation, Suffix, Country, Address fields, State, County, City, Zip Code, Phone, and Email.

 **Note:** The address fields are unavailable for entry by default. To enable these fields for entry, click the **Don't know** link or enter a zip code.

2. Click **Add New Contact** to open the Contact Details page and include a new contact. The Contact Details page lists all the registered contacts. The **Create New Contact** button below the Contacts grid allows you to create a new contact and include it in the transaction.
 - To add a registered contact, select a contact from the Registered Contact list. A modal window opens, allowing to select the Contact Type and the Primary flag.

Page Element	Description
Select Contact Type	Use the look up to view all the contact types and their description and then select the contact type for the transaction.
Is This Primary Contact	Turn on the switch if you want to make the selected contact person as the primary contact. If you make this contact person as the primary contact, then if there is any earlier contact assigned as Primary, it will automatically change to non primary contact.

Click **OK** to save the record and return to the Contacts page, which lists your newly added registered contact.


- To create a brand new contact, click Create New Contact and manually enter all contact details.
3. Update the additional contacts by clicking the Details button on a contact from the Additional Contacts list.
 - For registered contacts, the following fields are not available for edit: First Name, Middle Name, Last Name, and Business.
 - For newly created contacts, all the fields are available for edit.
 4. Click **Save** to save the contact and return to the Contacts page, which lists your contacts.

Applying Conditions to Applications

This topic describes how your Public Sector Community Development service allows you to view, update, apply, and resolve conditions on an application such as a permit or a planning application.

Viewing and Updating Conditions

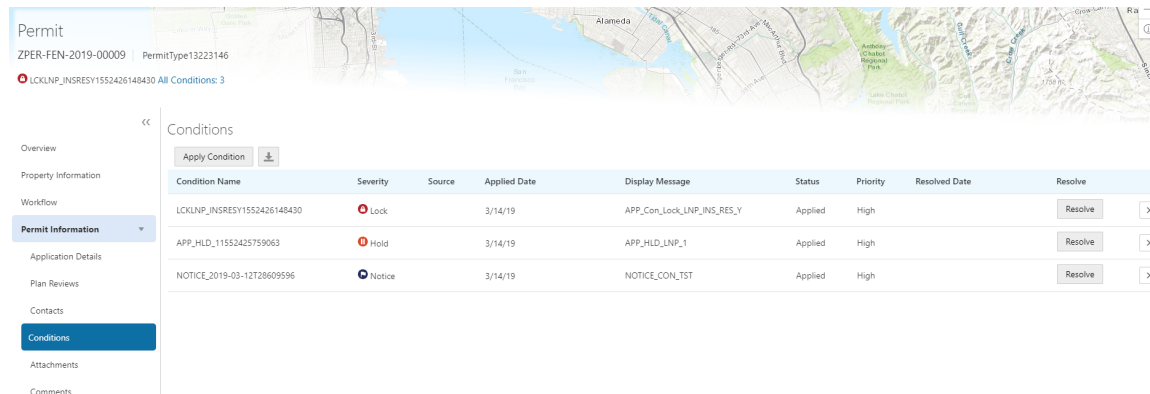
The Conditions page lists all the conditions applied to the selected transaction (such as a permit or a planning application), sorted by the applied ones at the top followed by the resolved ones. The Condition Indicator at the top displays the most severe condition having a high priority. A link – All Conditions allows you to view all the active conditions applied, their severity, applied date, and the display message.

 **Note:** The condition indicator is available on all pages across transactions and appears if one or more active conditions are applied. A condition is active until it is changed to Resolved.

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** page, select **Conditions** under **Permit** or **Planning Application Information**.

The Conditions page lists all the conditions applied to the transaction .

This example illustrates the Conditions page.







2. Select a condition and click the View More Detail button to open the Condition Details page and view the details of the condition. For a detailed description of all the fields, see the next section..
3. You can also edit the values and click Save to update the condition.

Applying a Condition to a Transaction

You apply conditions to transactions on the Apply Condition page.

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** page, select **Conditions** under **Permit** or **Planning Application Information**. Select **Apply Condition**.
2. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	Select a condition from a list of conditions that are enabled in setup.

Page Element	Description
<p>Severity</p> <p> Lock</p>	<p>Displays the level of severity as defined while setting up the condition:</p> <p>At the most severe level, the Lock condition suspends all operations, including workflow advancing, payment processing, inspection scheduling, and inspection results.</p>
<p>Severity</p> <p> Hold</p>	<p>Agency staff can select which rules to apply to conditions with this level of severity.</p>
<p>Severity</p> <p> Notice</p>	<p>This level functions as an alert and has no effect on operations.</p>
<p>Business Rules</p>	<p>Select one or more business rules. Options are:</p> <ul style="list-style-type: none"> ○ Prevent New (applicable to a parcel) ○ Prevent Workflow Advancing ○ Prevent Issue or Final ○ Restrict Payment ○ Prevent Inspection Schedule ○ Prevent Inspection Result <p> Note: The business rules available for selection are based on the severity of the condition you have selected. For example, for a condition whose severity is Hold you must select at least one business rule, and for a condition with Lock severity, all the business rules are automatically applied.</p> <p>For more details on the business rules, see Setting Up Conditions.</p>
<p>Additional Information</p>	<p>Enter additional information regarding the condition applied to the transaction.</p>
<p>Display Message</p>	<p>Displays the message on the Conditions list page as well as on the condition indicator at the top of the page, when you click the All Conditions link.</p>
<p>Priority</p>	<p>Select a priority from options High, Medium, and Low.</p>
<p>Description</p>	<p>Displays the description as entered while setting up the condition. You can change the text here and the condition description is updated when you save the condition.</p>
<p>Applied By</p>	<p>Displays in view mode, the name of the user who applied the condition, or as System if the condition is inherited.</p>

Page Element	Description
Applied Date	Displays in view mode, the date on which the condition was applied.

3. Click **Save** to save the condition and return to the Conditions page.


Resolving a Condition

You can resolve a condition that you applied to a transaction.

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** page, select **Conditions** under **Permit** or **Planning Application Information**.

Select the condition that you want to resolve and click the **Resolve** button to open the Resolve Condition page.

2. Enter a resolution text in the Resolution Action field and click **Save**. The resolution is applied and the resolved condition is listed at the bottom of the condition list.

 **Note:** If you resolve an inherited condition, the condition applied to the transaction alone is resolved. The resolution has no effect on the condition that is applied to any other transactions associated with the parcel on which the condition was applied and inherited.

Viewing a Resolved Condition

You can view the details of a resolved condition on the Condition Details page.

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** page, select **Conditions** under **Permit** or **Planning Application Information**.

2. Select a row with a status of **Resolved** and click **View Details**.

3. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:

- o Applied By
- o Resolution Action
- o Resolved By
- o Resolved Date

4. Click **Cancel** to return to the Conditions page.

Working with Application Attachments

You view a list of files and upload or download documents associated with an application on the Attachments page.

Attachments provide supporting documentation needed by agency staff during the permit or planning application process.

Viewing Application Documents

You view a list of application documents on the Attachments page.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Permit Information** or **Planning Application Information** menu item in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit or planning application.
5. On the Attachment page, view the list of documents, including this information:

Page Element	Description
File Name	View the following information in the Filename field: <ul style="list-style-type: none"> ○ Filename with file type extension ○ File Size ○ Uploaded By user name ○ Uploaded On date
Description	View the description of the attachment as entered by the person who added the attachment.
Uploaded By	View the name of the person who uploaded the document.
Category	View the document category for the attachment.
Actions	Click the actions icon to select and perform an action: <ul style="list-style-type: none"> ○ View Details ○ Download ○ Delete

6. Click the **Sort By** to view attachments grouped by these fields: file name, file size, uploaded by, uploaded on, description, category, and subcategory.
7. To find a specific attachment, you can enter values in the search field.

Adding Application Documents

You upload files to the Attachments page using the Add Attachments page. Inspectors can also add documents in Oracle Inspector.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Permit Information** or **Planning Application Information** menu item in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit or planning application.
5. Click the **Add** icon.
6. Select the file to upload in the browser dialog box and click **Open**.
The filename appears on the Add Attachments page.
7. On the Add Attachments page, you can enter a description of the file, a document category, and a document subcategory, if desired.

Use the look-up prompt to select a document category and subcategory that have been defined by the agency. For more information, see the implementation documentation for [Setting Up Document Categories and Subcategories](#).

8. Click the **Upload** button.

Viewing Application Document Details

You view document details on the Attachments details page.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Permit Information** or **Planning Application Information** menu item in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit or planning application.
5. In the attachments grid, click the **Action** icon for the document you want to download.
6. Select View Details to open the document details page. In addition to the information on the Attachments page, you can see who last updated the document and when.

Downloading Documents

You download a document on the Attachments page.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Permit Information** or **Planning Application Information** menu item in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit or planning application.
5. In the attachments grid, click the **Action** icon for the document you want to download.
6. Select Download and save to the location of your choice.

Deleting Documents

You can use this method for deleting one or more documents.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Permit Information** or **Planning Application Information** menu item in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit or planning application.
5. Click the **Edit** icon above the grid.
6. Select one or more documents to delete.
7. Click the **Delete** icon.
8. To delete a single document, go to the Attachments page, and select Delete in the **Action** menu for the document you want to delete.

Working with Application Comments

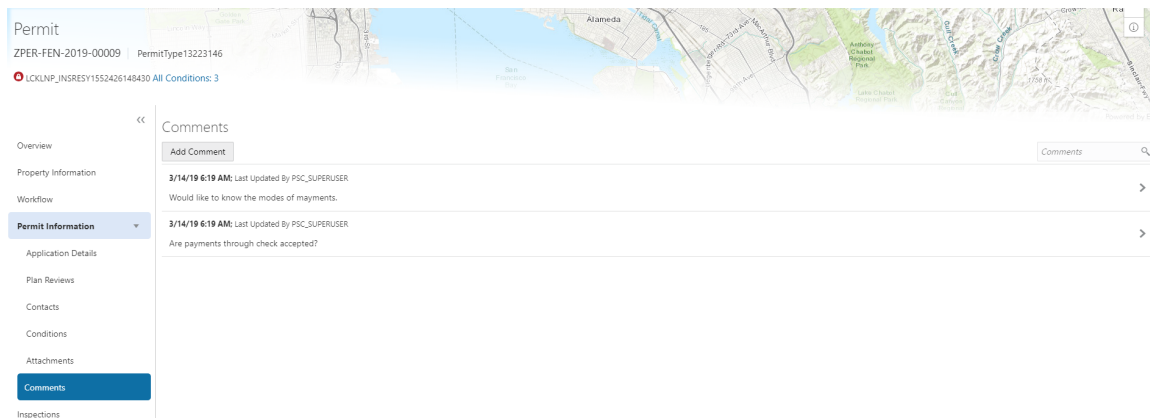
This topic discusses how to use comments. You can view, edit, and add comments on the Comments detail page for an application.

Adding Comments for an Application

You view, edit, and add new comments on the Comments page. You can mark comments you use regularly as your favorite and access them easily from the Favorite comments tab. You can also select and post a comment from the Standard

comments tab, which lists all the pre-defined comments. In addition, Recent comments tab allows you to select and post comments from a list of recently posted comments.

This example illustrates the Comments page, which is described in the following text.



Viewing and Editing Comments

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Comments** link in the navigation panel on the left.

You can view the list of comments and select the comment row to view the comment details. The Comment page opens to show the details of the comment.

4. To view the details of a comment entered earlier click the comment row.

You can edit, delete, or hide the comment from public only if it was entered by you.

5. Click **Save** after making changes to the comment.

Adding a New Comment

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Comments** link in the navigation panel on the left.
4. Click the **Add Comment** button to open the Add Comment page and enter a new comment. You can choose to use the **Rich Text Editor** option for formatting your comment. See Managing Comments documentation to enable the option of **Rich Text Editor** formatting.
5. Click **Post** to post the comment and return to the Comments page.

Adding Favorite, Standard, and Recent Comments

1. You can also post a comment that is already available in the Community Development service. Click the **Select Comments** button to open the Select Comments page and select a comment from one of the three tabs of comments – Favorite, Standard, and Recent.

The Favorite tab lists all the comments you have marked as favorite. The Standard tab lists all the predefined comments available in the Community Development service. The Recent tab lists all the comments that were recently posted.

2. Select a comment from any of these three categories and click the **Insert** button to post the comment.

Note: If you want to mark a standard comment as your favorite, click the * button on the comment row. The Favorite tab will add the comment to its list. Your agency decides the duration for which a comment can be called Recent. The duration can be set up on the Manage Comments page.

See [Managing Comments](#).

Working with Fees and Payments

You view and manage fees and payments associated with a submitted permit or planning application on the Fees and Payments page in the application details.

Tip: As agency staff, you can access this page on a phone as well as on a laptop or desktop computer. The layout changes based on the device you are using.

Fees are calculated based on agency fee setup.

For more information about setting up automatic fee calculations based on permit or planning application type, see [Creating Decision Models for Fees](#).

This example illustrates the Fees and Payments page containing the field values described in the following table.

Fee Description	Amount	Currency	Status	Department	Assessed Date	Payment Date	Payment Reference	Invoice
Application Fee	600.50	USD	Due	1001	07/19/2017			

Viewing Fees and Payments for an Application

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the selected application on the Transactions page.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the application.
4. On the Fees and Payments page, view a list of fees, including this information:

Page Element	Description
Fee Description	The description of the fee item as defined when creating a fee item.
Amount	The amount due for each fee item.

Page Element	Description
Currency	The currency in which the transaction will be paid.
Status	<ul style="list-style-type: none"> ○ Canceled: Indicates the fee payment is no longer required. ○ Pending: Indicates the payment transaction is currently in process. ○ Hold: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved. ○ Due: Indicates the current fee request is due and needs to be paid.
Department	The department within the agency requiring the payment.
Assessed Date	The date the request for payment was issued.
Payment Date	The date payment was received.
Payment Reference	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
Invoice	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
Total Fees	The total amount of fees that may be applicable to the application.
Total Payable	<p>The amount of fees that are designated as payable.</p> <p>The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.</p>
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.

Adding a Fee Item

Using the Fees and Payments page, you can add additional fees to an application if the situation arises, such as a late fee, an unforeseen processing fee, an addition to the project request, and so on. These fees are assessed outside of the automatic fees process. The **Add Fees** button is not available when the application status is Pending Payment or Pending Submittal. When the fee status changes to Due, the system sends a notification to the applicant that new fees have been assessed and are due.

To add a fee item:

1. Click **Add Fees** in the Fees and Payments grid to display the Add Fee Item page.
2. Select the appropriate fee from the **Fee Item** lookup list.
3. Enter the fee required for the item in the **Amount** field.
4. Set the status of the fee item using the **Status** drop-down list, such as Due.

5. Use the **Department** lookup list to select the department to collect the fee.

The department defaults from the fee item, if specified. Otherwise, the system uses the department from the Permit Type or Planning Application Type setup.

6. Set the appropriate date for the fee item using the **Assessed Date** field.
7. Use the **Memo** field to add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the application process.
8. Click Save.

Paying Fees

To add a payment for all fees that are due, click the **Pay** button. Doing so takes you to the Checkout page, where you can select the payment method.

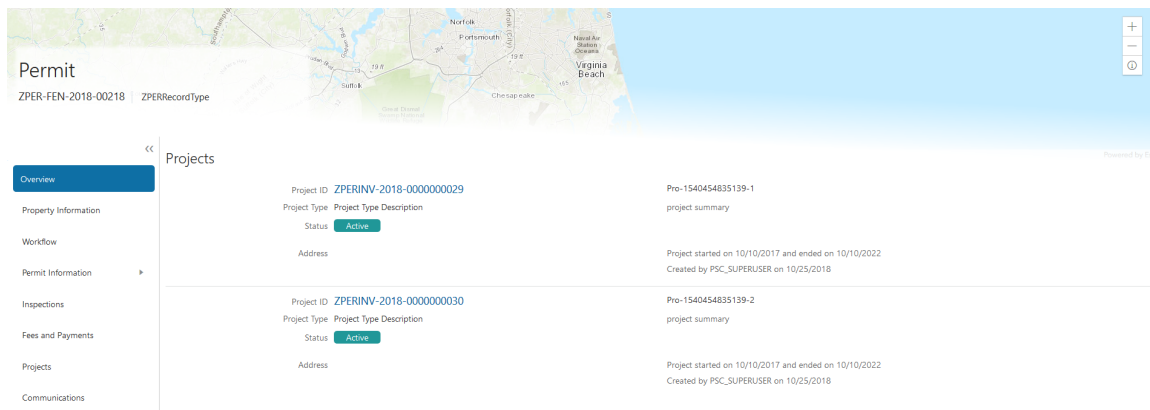
For more information about paying fees, see the [Payment Flow Overview](#).

Viewing Project Summaries

If a permit or planning application is assigned to a project, agency staff and public users can view a summary of the project in the application details. The permit or planning application can be assigned to multiple projects.

Agencies create projects to group various applications. A project provides a summarized, consolidated view across project-related records, for example, a construction project for a residential building or commercial development. Projects can be simple or more complex, including permits and various compliance requirements through to completion.

This example illustrates the Projects summary page in the permit details, which is described in the surrounding text.



Viewing the Project Summary

As an agency employee, you can navigate to the project summary in the application details through the Agency Springboard:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click **Projects** in the left navigation panel.
4. On the Projects page, you see a summary of the project that was created by the agency staff on a master projects page.

Page Elements	Description
Project ID	Click the project ID link to access the projects page that was created by agency staff. The project ID is automatically generated after saving the project.
Project Type	Review the project type. A project type is based on the nature of the project and is set up during implementation, for example, Commercial Project or Residential Project.
Status	Review the status of the project. For example, Active, Canceled, On Hold, Inactive, or Completed.
Address	Review the address of the project.
Project Name	Review the name of the project.
Project Summary	Review a summary of the project. The summary can be a long description of the project, as entered by the agency staff.
Project Start Date and Project End Date	Review the start and end dates.
Project Created By	Review the name of the person who created the project.

Related Topics

- [Adding a New Project](#)
- [Setting Up Project Types](#)
- [Viewing and Updating Project Details](#)

Working with Application Communications




Application-specific messages enable agency staff and applicants maintain correspondence regarding the progress of applications.





Agency users can send emails, notifications, and texts associated with a specific application on the Communication Details page. Agency staff and applicants can also use the Communication Details page to view a record of the messages associated with an application.

Sending Application Communications

1. Click **Permits** or **Planning Applications** on the Agency Springboard.
Select an application on the Transactions page.
Click Communications in the navigation bar.

2. On the Communication Details page, click **Add**.
3. On the Ad Hoc Message page, enter values for the following fields:

Page Elements	Definition
Channel Type	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none">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.o Text: Generates a short message service (SMS) text message that is sent to users. <p> Note: The fields that are available to define on this page vary depending on the channel type that you select.</p>
Visibility	<p>Select which type of user can see this message. Values are:</p> <ul style="list-style-type: none">o Account ownero Public usero Agency staff only
MIME Type (Multipurpose Internet Mail Extensions type)	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none">o HTMLo Text <p> Note: This field does not appear for the Text channel type.</p>
Priority	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p> Note: This field appears only for the Notification channel type.</p>
User Can Delete	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p> Note: This field appears only for the Notification channel type.</p>
Select and Insert	<p>These fields enable you to insert variable attributes into your message. 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> <p>For example, if you select the Body field and the Status attribute, and click Insert, the #{Status} variable is inserted into the Message Body field of the message. When you send this message, the status of the application associated with the message is included in the body text.</p>

Page Elements	Definition
Create Web Form	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message. For each row of the web form, enter the Question text along with the Answer Type that you expect from the recipient for that question. Possible answer types are:</p> <ul style="list-style-type: none">○ Date○ Text○ Number <p>Click OK to save your web form questionnaire and return to the Ad Hoc Message page. The Create Web Form button displays the number of questions included on the web form in parentheses.</p>
Insert Web Form	<p>Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
From	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p> Note: Enter email addresses for the Email channel type, user IDs for the Notification channel type, and phone numbers for the Text channel type.</p>
To	<p>Enter the email address, user ID, or phone number of the person or organization that you want to receive the message.</p> <p> Note: Enter email addresses for the Email channel type, user IDs for the Notification channel type, and phone numbers for the Text channel type.</p>
Cc	<p>Enter the email addresses of the people or organizations that you want to receive a copy of the message.</p> <p> Note: This field appears only for the Email channel type.</p>
Subject	<p>Enter a brief description of the purpose and content of the message.</p> <p> Note: This field does not appear for the Text channel type.</p>
Message Body	<p>Enter the main body text of the message.</p> <p>For the Text channel type and emails and notifications with the Text MIME type, you can enter only plain, unformatted text.</p>

Page Elements	Definition
	For the HTML MIME type, you can enter rich text, links, and images.

4. Click **Send**.

Viewing Application Communications

1. Click **Permits** or **Planning Applications** on the Agency Springboard.

Select an application on the Transactions page.

Click Communications in the navigation bar. The Communication Details displays all of the messages that are associated with the application.

2. For each row on the Communication Details page you can:

- o Click the **Actions** icon to resend or forward the message.

Select the **Resend** action to access the message in the Message Details modal page in display-only mode. Click **Resend** to send the message another time to the same list of recipients.

Select the **Forward** action to access the message in the Message Details modal page. Enter new recipient email addresses, update the message if necessary, and click **Forward** to send the updated message to the new recipients.


- o Click the **View More Details** button to view detailed information about the message.

Working with Ad Hoc Communications

Ad hoc communications enable agency staff to create and distribute alerts, emails, and notifications.

Agency staff can create and update ad hoc communications on the Communication Center page.

Alerts appear as text in the banner of the Agency Springboard or the landing pages for anonymous or registered users. Emails are messages sent to anonymous or registered users, and accessed through an email client. Notifications appear when registered and signed-in users click the notification icon at the top of the page in Oracle Public Sector Community Development. Short message service (SMS) text messages are electronic messages sent to anonymous or registered users over a cellular network or through an internet connection.

 **Note:** Agency staff can also create application-specific ad hoc emails, notifications, and texts on the Communication Details page, which is accessed from the Transactions page. For more information, see [Working with Application Communications](#).

Adding Ad Hoc Alerts

1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. On the Alerts tab of the Communication Center page, click **Add**.
3. On the Alert Details page, enter values for the following fields:

Page Element	Description
Reference Name	Enter a unique name for the alert.
Start Date Time and End Date Time	Enter the date and time when the alert starts and stops displaying.
Enabled	Turn on the switch to activate the alert.
To	<p>Enter a value for the target recipients of the alert:</p> <ul style="list-style-type: none"> ○ Individual Registered Users <p>Enter comma-separated user IDs for the registered users, for example, SYSTEM_ADMIN, BUSINESS_ANALYST.</p> ○ All Registered Users <p>Enter this attribute: #{User}. The application displays the alert when the registered user logs in.</p> ○ All Anonymous Users <p>Enter this attribute: #{Anonymous}.</p> ○ A Combination of Users <p>Enter a string including comma-separated user IDs for the registered users, #{User} for all registered users, and #{Anonymous} for all anonymous users.</p>
Message Body	Enter the main body of the alert using plain, unformatted text.
Select and Insert	<p>These fields enable you to insert variable attributes into your message. 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> <p>For example, if you select the Body field and the Current Date attribute, and click Insert, the #{Current Date} variable is inserted into the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p>
Remarks	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

Modifying Ad Hoc Alerts




1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. Select an alert on the Alerts tab of the Communication Center page.
3. On the Alert Details page you can:
 - Update the alert field values.
 - Delete the alert. You will be prompted to confirm the permanent deletion.
4. Click **Save**.



Deleting Ad Hoc Alerts



1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. On the Alerts tab of the Communication Center page click **Edit**.
3. Select the check boxes next to the alerts that you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Sending Ad Hoc Notifications, Emails, and Texts

1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. On the Emails, Notifications, and Texts tab of the Communication Center page, click **Add**.
3. On the Message Details page, enter values for the following fields:

Page Elements	Definition
Channel Type	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none">o Email: Generates an email that is sent to users.o Notification: Generates a notification that appears when users click the notification icon at the top of the page in the application.o Text: Generates a short message service (SMS) text message that is sent to users. <p> Note: The fields that are available to define on this page vary depending on the channel type that you select.</p>
Visibility	<p>Select which type of user can see this message. Values are:</p> <ul style="list-style-type: none">o Account ownero Public usero Agency staff only
MIME Type (Multipurpose Internet Mail Extensions type)	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none">o HTMLo Text <p> Note: This field does not appear for the Text channel type.</p>
Priority	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p> Note: This field appears only for the Notification channel type.</p>
User Can Delete	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p>

Page Elements	Definition
	<p> Note: This field appears only for the Notification channel type.</p>
Reference	Enter a unique alphanumeric reference for the communication.
Select and Insert	<p>These fields enable you to insert variable attributes into your message. 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> <p>For example, if you select the Body field and the Current Date attribute, and click Insert, the \$(Current Date) variable is inserted into the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p>
Create Web Form	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message. For each row of the web form, enter the Question Text along with the Answer Type that you expect from the recipient for that question. Possible answer types are:</p> <ul style="list-style-type: none"> ○ Date ○ Text ○ Number <p>Click OK to save your web form questionnaire and return to the Message Details page. The Create Web Form button displays the number of questions included on the web form in parentheses.</p>
Insert Web Form	Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.
From	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p> Note: Enter email addresses for the Email channel type, user IDs for the Notification channel type, and phone numbers for the Text channel type.</p>
To	<p>Enter a value for the target recipients of the message.</p> <p>For notifications, enter comma-separated user IDs for the registered users, for example, SYSTEM_ADMIN,BUSINESS_ANALYST.</p> <p>For emails, enter comma-separated email addresses for the recipients, for example, john.doe@example.com.</p> <p>For text messages, enter comma-separated phone numbers for the recipients, for example, +15005550006.</p>
Cc	Enter the email addresses of the people or organizations that you want to receive a copy of the message.

Page Elements	Definition
	 Note: This field appears only for the Email channel type.
Subject	Enter a brief description of the purpose and content of the message.  Note: This field does not appear for the Text channel type.
Message Body	Enter the main body text of the message. For the Text channel type and emails and notifications with the Text MIME type, you can enter only plain, unformatted text. For the HTML MIME type, you can enter rich text, links, and images.

4. Click **Send**.

Viewing Ad Hoc Emails, Notifications, and Texts

1. Select **Communication Center** on the Agency Springboard.
2. For each row on the Emails, Notifications, and Texts tab of the Communication Center page you can:
 - o Click the **Actions** icon to resend or forward the message.

Select the **Resend** action to access the message in the Message Details modal page in display-only mode. Click **Resend** to send the message another time to the same list of recipients.

Select the **Forward** action to access the message in the Message Details modal page. Enter new recipients, update the message if necessary, and click **Forward** to send the updated message to the new recipients.

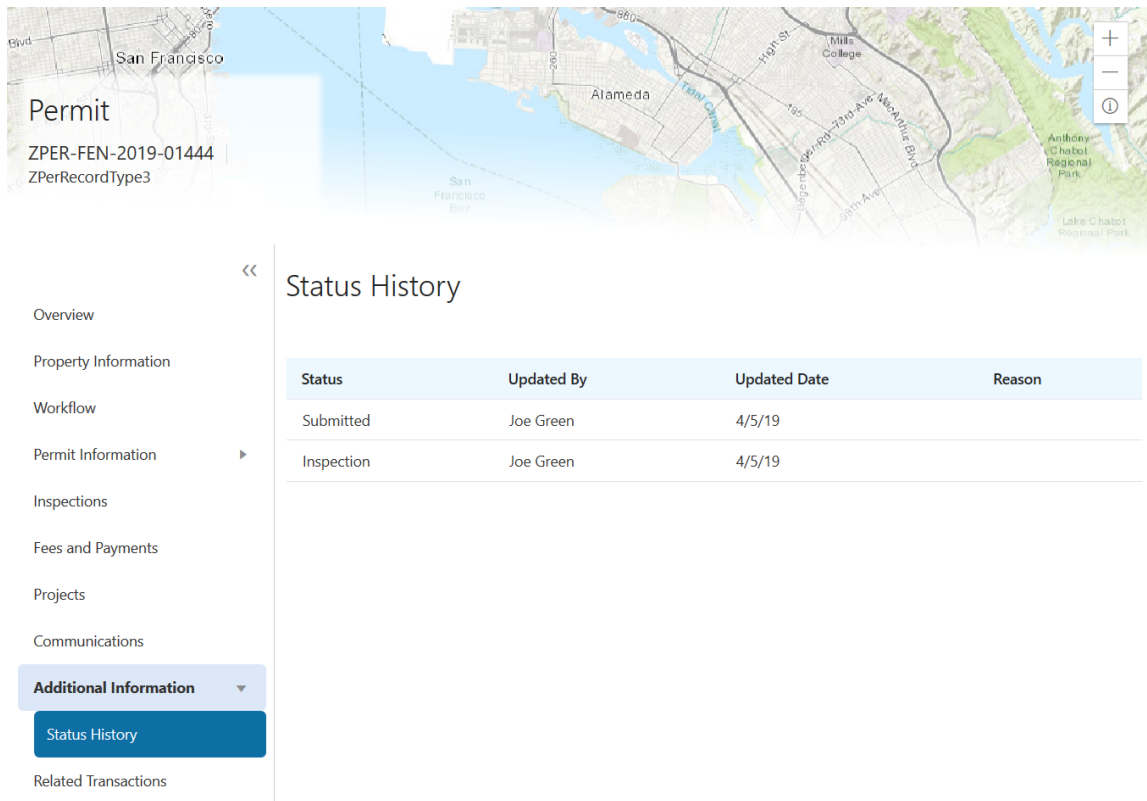
- o Click the **View More Details** button to view detailed information about the message.

Viewing Application Status History

You can view the history of application status changes on the Status History page in the application details.

Whenever the status changes for a transaction, the change is recorded and viewable in the details for the application. The status history is display-only.

This example illustrates the Status History page, which is described in the following text.



Reviewing the Status History

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Click the row for a permit or planning application to access the detail.
3. Click the **Additional Information** menu item in the left panel.
4. Click the **Status History** link to view the Status History page for the permit or planning application.

Page Element	Description
Status	Displays all of the transaction statuses that have been applied to the application. For a list of transaction statuses, see Setting Up Transaction Statuses .
Updated By	Displays the name of the person who performed the action that updated the status in the system.
Updated Date	Displays the date when the status changed for the application. The dates are displayed by the first to latest status.
Reason	Displays the justification for withdrawing an in-progress application or for canceling a pending application. A reason is required when the agency staff withdraws or cancels an application.

Related Topics

- [Setting Up Transaction Statuses](#)

Working with Related Transactions

Applicants and agency users can link their permit or planning applications to other transactions using the Related Transactions page. You can establish relationship between transactions and then perform actions such as viewing the related transaction applications and managing comments.

Adding a Related Transaction

As an applicant, you can establish links only from your permit or planning application. Agency staff can however add related transactions for any permit or planning application.

To link a permit or planning application to a transaction:

1. Select the **Permit** or **Planning Application** tile on the Agency Springboard.
2. On the Transactions page select the permit or planning application for which you want to link a transaction.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page.
4. Click the **Link Transaction** button to locate and then link the required permit or planning application. The Related Transactions page lists the new transaction row with a link to access the linked application.

Removing a Related Transaction Link

As an applicant you can remove the link between related transactions from your own permit or planning application. Agency staff have access to all permit and planning applications to remove related transaction links.

To remove an application link:

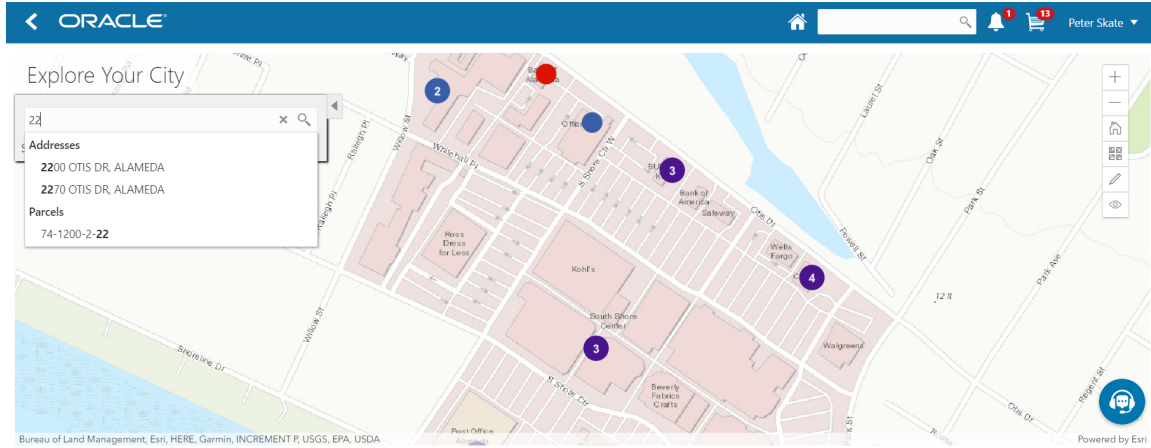
1. Select the **Permit** or **Planning Application** tile on the Agency Springboard.
2. On the Transactions page select the permit or planning application from which you want to remove the application link.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page.
4. Click the **Actions** button on transaction row and select **Remove Application Link**. The Related Transactions page lists the remaining related transaction rows.

Using Maps

Maps provide a convenient way for both agency staff and public users to see application locations and to select parcels when starting an application.

Map functionality relies on integration with a third-party map service such as Esri Global Information Systems (GIS).

This example shows some of the options on the Explore Your City map for registered public users.



Pages With Maps

The following table describes how you access and use maps throughout the system:

Page and Users	Navigation	Usage
Main Map page (agency staff)	Click the Main Menu icon in the page header.	View application locations on a map. Select parcels by searching or by drawing on the map, and start applications for selected parcels. Search applications by address or parcel number, and filter applications by start date, end date, and application type.
Explore Your City page (anonymous and registered public users)	Click the Explore Your City tile on the landing page.	All public users can view and search applications and select parcels. Registered users can additionally filter applications so that only the user's own applications appear on the map. Also, registered users can start new applications for parcels that they select.
Application list pages: <ul style="list-style-type: none"> Transactions page (agency staff) Applications page (registered public users) 	<ul style="list-style-type: none"> Agency staff: click either the Permits tile or the Planning Applications on the agency springboard, then click the Map View icon on the Transactions page. Registered public users: click the Applications tile on the public user landing page, then click the Map View icon on the Applications page. 	View map markers for listed applications. The map view of these pages has a left frame that lists the applications. Clicking a specific application zooms the map to the application location.
Detail pages for an individual application (agency staff and registered public users): <ul style="list-style-type: none"> Permit page Planning Application page 	From the Applications page or the Transactions page, access an individual application in the list.	If the application is associated with a parcel address, the map at the top of the page includes a map marker to indicate the primary address for the application.

Page and Users	Navigation	Usage
		If the application is not associated with a location, the map displays a default area that your agency configures.
Property Picker map (agency staff and registered public users)	<ul style="list-style-type: none"> Start a new application, and continue until you reach the Property section. Click the Find Parcel on Map icon. Access the details for an existing application, and click the Property Information link to display the Property Information page. Click the Find Parcel on Map icon in the Parcel List section. 	Choose a parcel on the map, then add it to the current application.
Generate Notifications List page (agency staff)	<p>From the Planning Application detail page, click Planning Application Information in the left panel, then click the Hearing link.</p> <p>Locate the hearing, then select the Actions button and choose Generate Notifications from the menu that appears.</p>	<p>Create a notification zone by specifying a distance from selected parcels.</p> <p>This page is accessed from a hearing for an application, and the parcels from the application are automatically selected. You can change the selection if necessary.</p> <p>After creating a notification zone, download .csv files with parcel, address, and owner information for all parcels that are at least partially within the zone.</p>
Parcel detail pages (agency staff)	Click the Parcel tile on the agency springboard to access the parcel list, then drill into an individual parcel	The map above the parcel detail pages displays a marker at the parcel address.
Address detail pages (agency staff)	Click the Property Address tile on the agency springboard to access the address list, then drill into an individual address.	The map above the address detail pages displays a marker at the specified address.

Generic Map Tools

The main toolbar on any map has tools that relate to the map itself, without regard to applications.

Use map profiles to configure which tools are available on the main toolbar. Different maps support different tools. For information on configuring which tools appear in the main map toolbar, see [Setting Up Map Profiles](#)

These are the generic map tools that can appear on the main map toolbar:









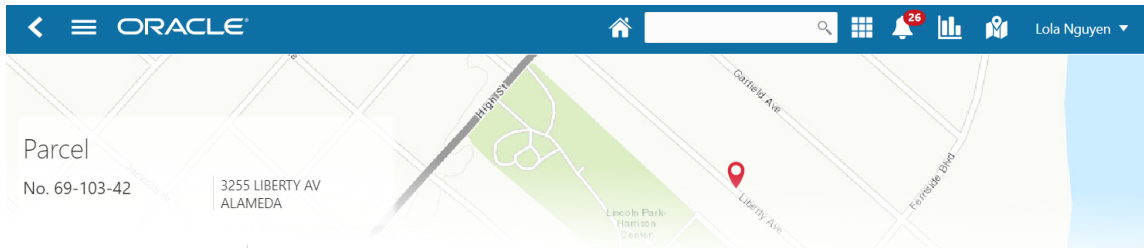
Image	Name	Description
	Zoom In and Zoom Out	<p>These standard zoom controls are available for all maps.</p> <p>You can also double-click a map location to zoom in.</p>
	Show Default Map View	Click to restore the map to its default display area.

Image	Name	Description
		<p>Use map profiles to configure whether this button appears on the toolbar.</p>
	<p>Select Base Map</p>	<p>Click to display a pop-up window with a gallery of map options such as Streets or Topographic.</p> <p>Use map profiles to configure whether this button appears on the toolbar.</p>
	<p>Select Layers</p>	<p>Click to display a pop-up menu for changing the visibility of various map layers. Examples of layers include the parcel layer and address layer provided by the map service.</p> <p>To hide the pop-up menu, click the button again.</p> <p>Use map profiles to configure whether this button appears on the toolbar.</p>
	<p>Show Attribution (for maps in page headers)</p>	<p>Click to display a pop-up window that identifies the third-party map sources.</p> <p>This toolbar button is not configurable. Some maps have this button, while other maps, such as Explore Your City, display attribution information across the bottom of the map page.</p>
	<p>Identify GIS Information (for maps that are not in page headers)</p>	<p>Click to enable the display of object details for map objects (such as parcels) that you click. Details appear in a pop-up window. To stop displaying object details, click the button again to turn off the option to identify GIS information.</p> <p>The location of the pop-up window depends on the docking settings in the map profile.</p> <p>Use map profiles to configure whether this button appears on the toolbar.</p>
	<p>Show Selection Tools or Hide Selection Tools</p>	<p>Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map.</p> <p>This button is not configurable. It appears on the Main Map and Explore Your City map.</p>
	<p>Show Transactions</p>	<p>Click to display the Show Transactions pop-up window. This window has controls for showing or hiding transactions on the map and for filtering those transactions by date or by the kind of application (permit application or planning application)</p>

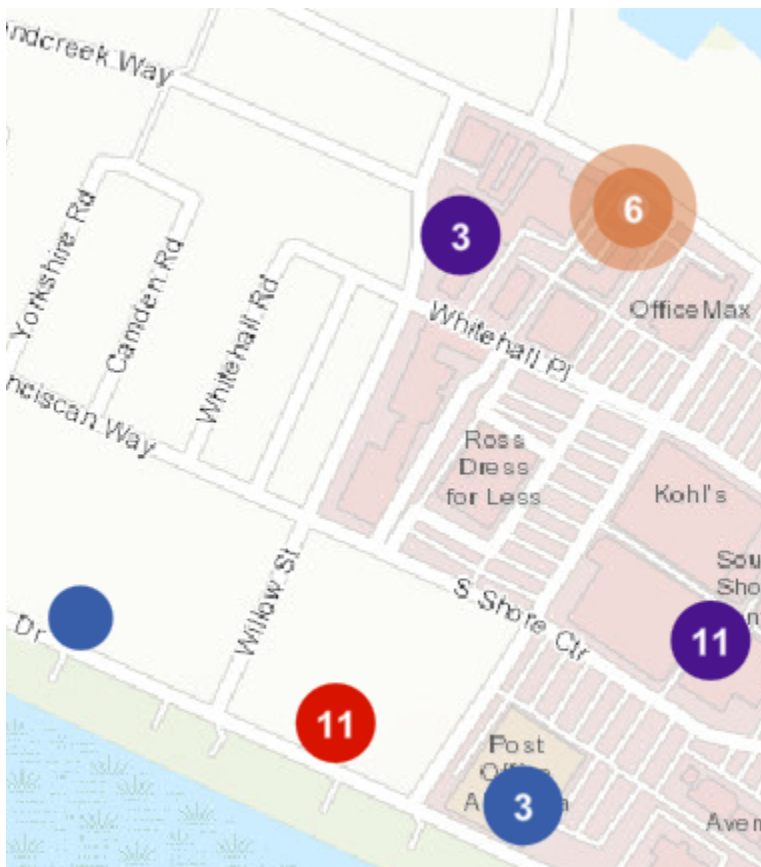
Map Markers

Map markers identify the location of an object such as an application, a parcel, or an address.

This example illustrates the Parcel page, where the map marker shows the parcel's location. Similar markers appear on the detail pages for applications, addresses, and property owners.



This example illustrates the Explore My City page, where map markers show application locations. Numbers on markers indicate the number of applications associated with the location. When there is just one application, the marker does not have a number.



Each color represents different types of transactions:

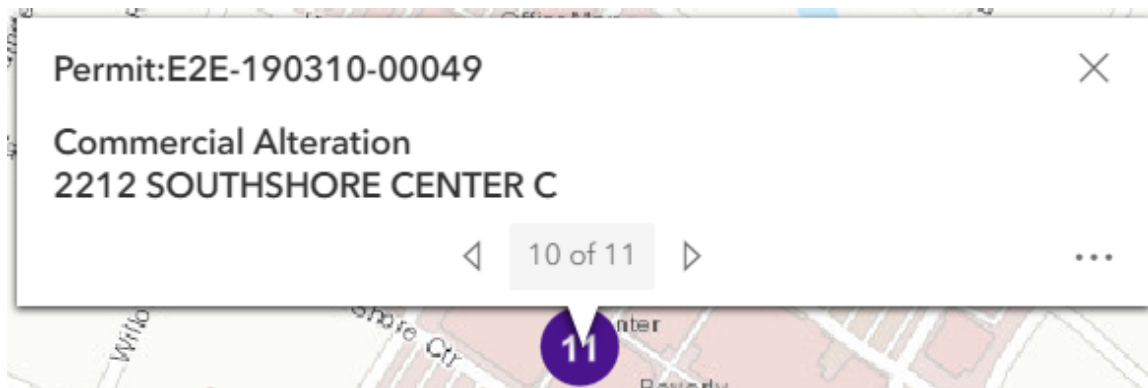
Application Map Marker	Description
Red	One or more permit applications for the same location.
Blue	One or more planning applications for the same location.

Application Map Marker	Description
Purple	A mix of permit applications and planning applications for the same location.
Orange (darker circle within a lighter circle)	Multiple parcels clustered together. This marker is used when the map's zoom level would cause the markers for neighboring transactions to overlap. As you zoom in, the cluster marker disappears and markers for the individual parcels appear.

Viewing Application Details

Clicking an application marker displays a pop-up window with additional details. (However, if the selection toolbar is visible and there is an active selection tool, clicking performs the selection action rather than opening the details pop-up.)

This example illustrates the detailed information for a map marker. The location of the pop-up window depends on the docking settings in the map profile



The detail window includes this information:

Map Marker Detail	Description
Permit or Planning Application followed by the application number	Identifies whether this is a permit application or a planning application, and identifies the individual application.
<Application Type>	Identifies the specific permit application type or planning application type.
<Address>	Identifies the location for the application.
<sequence number> of <total number of applications> and controls for paging through multiple applications.	Indicates that there are multiple applications associated with the marker, and enables you to page through the applications.
...	Click to open a menu with these actions:
Button to display an action menu.	<ul style="list-style-type: none"> • Zoom To: select to zoom in on this applications' location on the map. • Go: select to open the corresponding application details page in a new window.

Searching for Applications and Parcels On Maps

This table describes search, filter, and selection functions on various maps.

Map	Description
Main Map (agency staff)	These maps have robust options for working with parcels and applications, including:
Explore My City (public users)	<ul style="list-style-type: none"> Viewing all applications in the map area. Filtering applications by date and kind of application (permit applications or planning applications). For registered public users, filtering applications to show only the user's own applications. Selecting parcels by searching either addresses or parcel numbers. Selecting parcels using tools for drawing point, polylines, or polygons. Starting applications for selected parcels. <p>For more detailed information about working with the Main Map and the Explore My City map, see Using the Main Map and Explore Your City Map.</p>
Transactions (agency staff)	On these list pages, the map view shows the location of the listed applications. The search and filter options in the map view are the same options that you have in the list view.
Applications (registered public user)	The map view includes a left frame with a list of permits, and you can click a permit to zoom to its marker on the map.
Generate Notifications List (agency staff)	<p>This maps has the same parcel selection options as the Main Map, including:</p> <ul style="list-style-type: none"> Selecting parcels by searching either addresses or parcel numbers. Selecting parcels using tools for drawing point, polylines, or polygons.
Property picker map within an application (all users)	<p>The property picker map has a single search field where users can enter an address. If a match is found, the map zooms to the to the desired location and displays a pop-up box that points to the location so the user can click it to select the parcel.</p> <p>Clicking a parcel on the map retrieves the parcel identifier from the map service. This value is used as criteria for searching the Parcel table, and the search results appear in a modal window. As long as the parcel number has a unique match in the Parcel table, the search results include just one value, representing the selected parcel. From the search results window, you can select the parcel and add it to the application.</p>

Using the Property Picker to Select a Parcel for an Application

The property picker is a map-based tool for choosing the parcel to association with an application.

To select a parcel using a map:

- Access the page where you select a parcel to associate with the application:.
 - In an unsubmitted application, find the **Property** section and click the **Select** button.
 - In a submitted application, access the application detail page, click the Property Information link, and find the **Parcel List** section.
- Click the **Find Parcel on Map** icon to open the map-based property picker.
- Use map tools such as searching or zooming to locate the parcel on the map.

4. Click the parcel.

The map closes, and the Search Property window opens. The system searches properties using the parcel ID provided by the map service, so the list of search results shows the parcel that you selected.

5. Select the check box for the parcel.

6. Click the **Add Selected** button.

The selected parcel is now added to the application.

Using the Main Map and Explore Your City Map

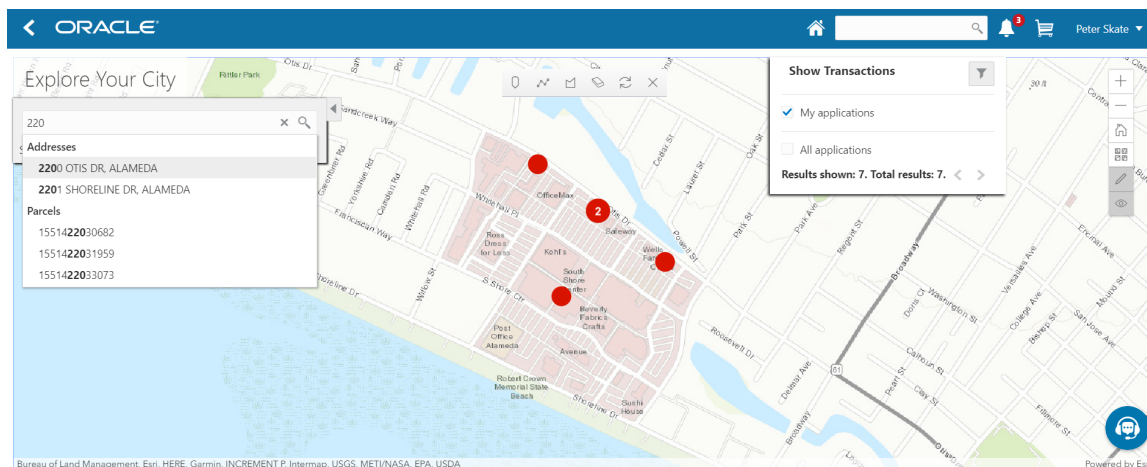
The agency-facing Main Map and the public-facing Explore Your City map provide a variety of options for viewing existing applications on the map and for selecting parcels so that you can start new applications.

To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps have different map profiles, giving you control over whether various map options are available to each audience. However, these maps provide the same functionality, enabling users to:

- Search for and select parcels, and then start an application for the selected parcels.
- View transaction locations on the map.

There are some differences depending on whether the user is a registered public user, an anonymous user, or agency staff. These differences are noted in the documentation.

This example shows the Explore Your City map for registered public users.



Selecting Parcels

Selecting parcels on the map enables you to start applications for those parcels. The system brings the parcel information into the application intake form.

To select parcels, use the search feature, or the drawing tools on the selection toolbar, or a combination of both. When parcels are selected:

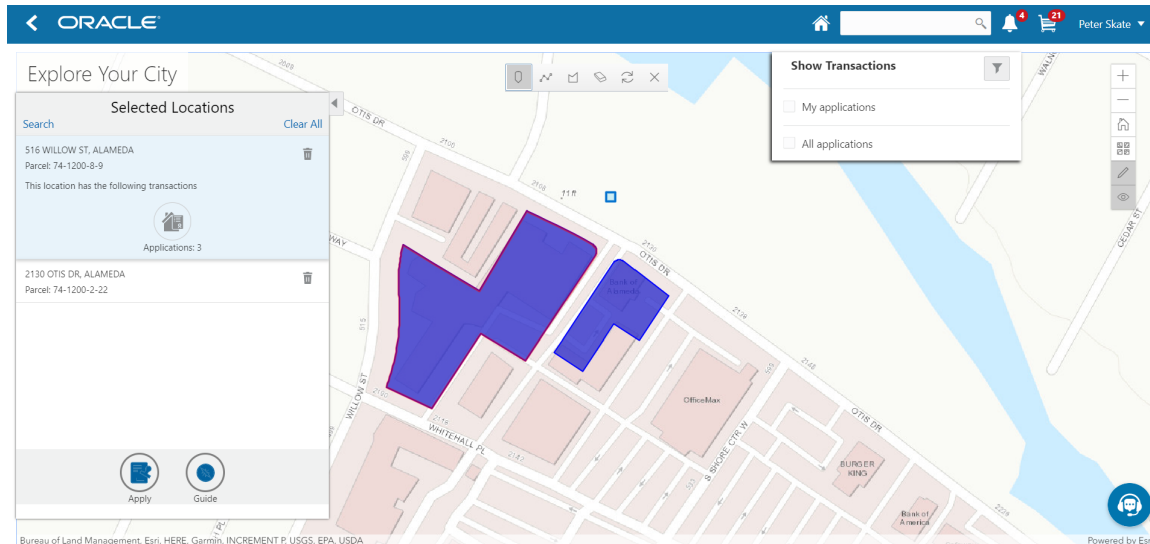
- The parcel polygons on the map are solid blue.

- The Selected Locations overlay replaces the Search overlay and provides additional information about the selected locations.
- **Apply** and **Guide** buttons appear on the Selected Locations overlay so that you can start an application for the selected parcels.

The **Guide** button provides access to a questionnaire that is configured using Oracle Policy Automation (OPA). The button appears only if your agency has implemented this functionality.

Anonymous public users cannot start applications, so they don't see the **Apply** button. They still see the guide button.

This example shows a map with selected parcels.











To select and deselect parcels using the Search overlay:

1. Enter a full or partial address or parcel number in the search field.
As you type in the search field, up to five matching addresses/parcels appear in a type-ahead drop-down list. The type-ahead list includes headings to indicate which items are **Addresses** and which are **Parcels**.
2. Press the Return key or click the magnifying glass icon to perform a full search.
The Search window expands to show lists for Addresses and Parcels with a count for each type of result. Initially a maximum of five items appears in each list.
If more results exist, click the **More** link to show all results in a scrolling list. When the list is expanded, click the **Less** link to shrink the list back down to five locations.
3. To select a parcel, click a single address or parcel number from either the type-ahead list or the full results list.
The corresponding parcel on the map is selected, and the search field is replaced by the Selected Locations list.
4. To deselect a single parcel from the Selected Locations list, click the **Delete** icon for that parcel.
5. To deselect all parcels from the Selected Locations list, click the **Clear All** link at the top of the list.
6. To re-display the search field without losing your selection, click the **Search** link.
Perform as many searches as needed to select the desired parcels. Each time you select a parcel, it is added to the Selected Locations list.
7. To return to the Selected Locations overlay from the Search overlay without performing a search, click the **Selected Locations** link.

This link appears if at least one parcel is selected.

To select and deselect parcels using drawing tools:

1.  Click the **Show Selection Tools** button on the map's general toolbar.
The drawing toolbar appears.
2. Use these tools to make your parcel selection:

Selection Toolbar Button	Description
 Draw a Point	Click one or more points on the map to select the parcels that contain the points.
 Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All parcels that intersect the resulting polyline are selected.
 Draw a Polygon	Click three or more points on a map to draw a polygon. The system redraws the polygon after each click. Double-click on the final point to stop drawing. All parcels that are at least partially within the resulting polygon are selected.
 Deselect One	Click a selected parcel to deselect it. <div style="color: blue; font-weight: bold;">  Note: </div> Selecting a parcel does not deselect previously selected parcels. You must use the Deselect One or the Deselect All tool to remove parcels from your selection.
 Deselect All	Click this button to deselect all parcels.
 Close	Click to close the toolbar.

3. Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever parcels are selected.

Working With the Selected Locations List

The Selected Locations overlay enables you to review information about the locations you have selected. It also provides options for deselecting individual locations or all locations.


This example illustrates the Selected Locations overlay. In this example, the addresses and parcel numbers of selected locations are links to the corresponding detail pages. These links are only present for agency staff. When public users see the Selected Locations overlay, the addresses and parcel numbers appear as plain text.

Selected Locations

Search Clear All

2200 OTIS DR, ALAMEDA
Parcel: 74-1200-32

This location has the following transactions



Applications: 40

2201 SHORELINE DR1, ALAMEDA
Parcel: 74-1200-32

To use the Selected Locations overlay:

1. Review the address and parcel information for locations that you selected.
Each location card represents an address. If you select a parcel with multiple addresses, each address appears on a separate card.
Agency staff can access the detail pages for selected addresses and parcels by clicking the address link or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.
2. Click a location card to select it and learn more about the parcel.
On the map, the polygon for the selected location is outlined.
If the selected parcel is associated with applications, the selected card expands and displays an **Applications** icon with an application count. If the parcel is not associated with any applications, the selected card looks the same as it does when it's collapsed.
3. To see a list of applications for a parcel, click the **Applications** icon.
The Applications list replaces the Selected Locations list. The list includes these elements:

Page Element	Description
<Address> and Parcel ID for the parcel.	The identifying information for the parcel appears at the top of the list.
<Application ID> and Application Type>	The first column in the application list displays identifying information about the application.

Page Element	Description
<Application Status>	The second column in the application list displays the application status.
	The last column in the application list displays the Go icon. Click this icon to open the appropriate application details page (the Permit page or the Planning Application page) in a new window.

- To return to the Selected Locations list, click the return button in the window header.

Starting an Application

The purpose of selecting parcels on a map is to start an application for the specified location.

To start an application:

- Confirm that the correct parcels are selected.
- To go to the Apply page, click the **Apply** button.

This button is not visible to anonymous public users.

The Apply page provides multiple options to help you choose the correct application type and start the application.

As long as the application intake form includes a Property section, the property information will be pre-filled based on the parcels that were selected when you clicked the **Apply** button.

See also [Starting an Application](#).

- To use the Guide to choose an application type, click the **Guide** button.

The Guide is a questionnaire to help identify the recommended applications for a project. The Guide button is available only if an Oracle Policy Automation (OPA) definition is associated with the agency record. For more information, see [Setting Up Agencies](#) and [Managing OPA Policies for Agency](#).

If you start an application at the end of your guided questionnaire, the property information section of the intake form will be pre-filled based on the parcels that were selected when you clicked the **Guide** button.

Showing Transactions

Agency staff, registered public users, and anonymous public users can all view transaction markers on the map. Registered public users can additionally filter the map to show only their own transactions.

To show transactions on the map:

-  Click the **Show Transactions** button on the map's general toolbar.

The Show Transactions overlay appears.

- In the Show Transactions overlay, use these check boxes to choose if map markers identify application locations:

Page Element	Description
All Applications	When you select this check box, the map displays markers for all applications in the mapped area. Deselecting this check box clears the map markers.


Page Element	Description
My Applications	<p>Only registered public users see this check box. They can select this check box to filter applications so that only the user's own applications are marked on the map. Deselecting this check box clears the map markers.</p> <p>This check box and the All Applications check box are mutually exclusive, so selecting one deselects the other.</p>

- If you choose to show map markers, use the **Results Shown** message at the bottom of the window to see how many map markers are shown.

The message informs you how many results have been mapped and how many total results exist. The number of results shown is based on the whole map extent and does not change as you zoom and pan.

Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons to scroll to a different block of results and update the map to show markers for the new block of results.

- To filter applications by date or by the type of application (permit versus planning):

-  Click the **Filter By** button to display additional filter fields.
- Enter filter criteria in these fields:

Page Element	Description
Start Date	If you enter a start date, only applications that were submitted on or after this date are included.
End Date	If you enter an end date, only applications that were submitted on or before this date are included.
Type	Select Permit or Planning Application to show just one kind of application. To go back to seeing all applications, clear the selection by choosing Type.

- Click **Apply**.

The filter section of the window is hidden, and the **Filter By** icon changes from gray to blue to show that filters are active.

- To clear filters, display the filter area and click the **Clear** button.

-  To close the Show Transactions overlay, click the **Show Transactions** button on the map's general toolbar again.

3 Managing Projects

Using Projects

This topic discusses how to use the Public Sector Compliance and Regulation Projects.

A Project is a collection of various records from transactions, which include permits, planning applications, and pre-applications. It provides a summarized, consolidated view across project-related records.

Agency staff create and manage such inventory of projects comprising of various records and their attributes, and maintain detailed project information – all easily accessible from one location – the Projects page.

You use the Projects page to manage a complete list of projects with all the details, and perform various tasks.

This example illustrates the Projects page:

Projects

Project	Summary	Contact	Status	Start Date	End Date
Pro-2018-00522 AAA-2018	AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the art equipment, allowing new offices to just plug and play their systems.	SIMMONS Robert +1 (751) 852-9632	Completed	10-21-15	
Pro-2018-04462 Pro2469	Connuire Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.	Robert M Jacob +1 (751) 852-9562	On Hold	10-04-17	11-20-19
PROI-OCT2018-4 John Tumac	Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops.	ALBERT MICHAEL SIMMONS +1 (951) 852-9632	Inactive	09-05-17	11-01-19

Page 1 of 3 (1-3 of 18 items) | 1 2 3 > | Show Default

Use the project list on the Projects page to perform these tasks:


- Manage project activity
- Create new or update existing project details
- Assign or Unassign transactions
- Add and maintain project attachments
- Add and maintain project contacts
- Access comprehensive project record details

You can access the Projects page by clicking the **Project List** tile on the Agency Springboard, or by clicking **Projects > Project List** in the navigation bar.

Using the Projects Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, you can perform these actions:

Page Elements	Description
Add	Click to add a new project, assign transactions, and create contacts.
Search	Search by alphanumeric characters on the fields for projects in the list. The projects that meet the search criteria are displayed on the page.

Page Elements	Description
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort by	Select an option to sort the projects in the list by these fields: <ul style="list-style-type: none"> ○ Project ○ Project Summary ○ Contact ○ Status ○ Start Date ○ End Date
	Click the Details button to access the details for the selected project.

Adding a New Project

As an agency staff, you can create new projects to include transactions and contacts.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Add** button.
3. On the Project Details page, add values for the fields in the Projects section:

Page Elements	Description
Project ID	Displays the system generated project ID after you save the project.
Name	Enter the name of the project.
Summary	Enter a detailed description of the project.
Type	Select the type of project from the list of options.
Status	Select the status of the project: <ul style="list-style-type: none"> ○ Active ○ Canceled ○ On Hold ○ Inactive ○ Completed
Estimated Valuation	Enter an estimated amount for the project.


Page Elements	Description
Start Date	Enter the start date for the project.
End Date	Enter the end date of the project.
Primary Contact	Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the Search option. Select the desired contact and use the Select Contact Type option to select the type of contact.

4. In the **Primary Address** section, click the prompt to open the Search Property page.
5. Use the Search box to filter the parcel, address, or owner values by keyword. Select the record you want by clicking the **Select** button. The Search Property page closes and the selected address appears on the Project Details page.
6. Click **Save** to save the new project and return to the Projects page. The new project record now appears in the projects list.

Assigning Transactions to a Project

As an agency staff, you assign permits to a project that you have created. You use the Assign page to assign transactions to your project. Transactions include permits, planning applications, and pre-applications.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record that you want to assign transactions to.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page, click the **Assign** button.
5. The Assign page opens with a list of all transactions available in the system. Use the **Search** option to search transactions by address, applicant, or transaction ID.
6. The **Filter** allows you to refine your search results further using the permit applicant's name and address.
7. Select the transactions using the check box available against each transaction record.
8. Click the **Assign** button to assign the selected transactions and return to the Transactions page, which lists the new transaction assignments.

 **Note:** As a project manager, you can assign transactions to your project. The **Assign** page lists only those permits, planning applications, and pre-applications that were applied by you. The system ensures that project managers can assign only those transactions that were created by them. See the documentation on Security.

Unassigning Transactions from a Project

As an agency staff, you can unassign transactions from a project that you have created. You use the Transactions page to unassign transactions from your project.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record from which you want to unassign transactions.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page click the **Edit** button, which enables you to select transaction records to unassign.
5. Use the check box available against each transaction record that you want to unassign and then click the **Unassign** button.

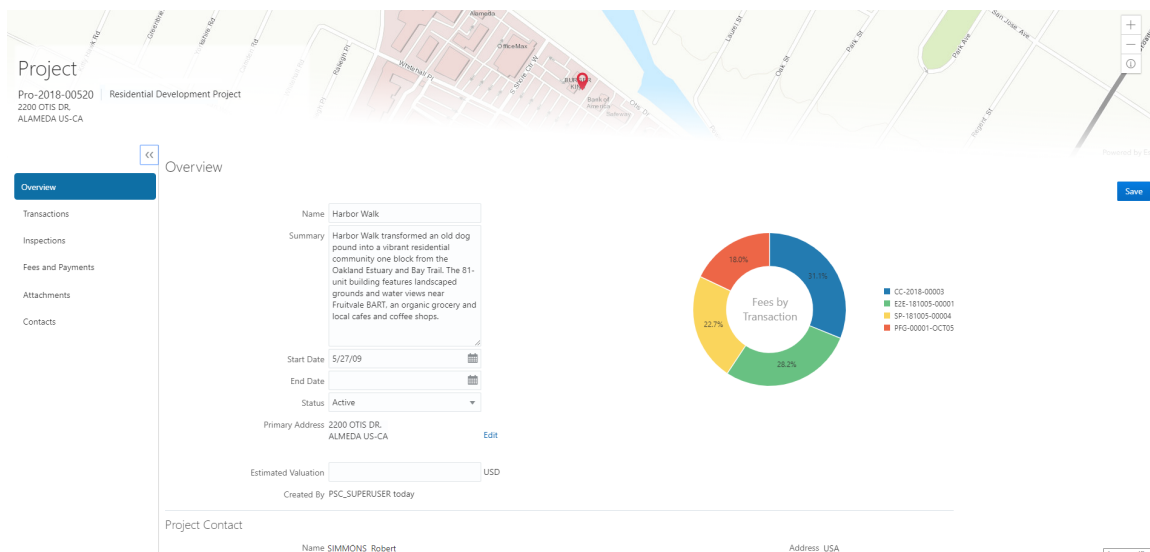
Viewing and Updating Project Details

You view and manage projects comprising of transaction assignments, project attachments, and project contacts on the Project Details page.

The header displays the project code, project type description, and the project primary address. A map marker displays the primary location of the selected project on the map.

The left panel lists the six links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, and Contacts. Clicking each link opens the detail view on the right panel.

This example illustrates the Project Details page:



Using the Overview Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. The Overview page displays the information about the selected project in three sections – Overview, Primary Contact, and Fees and Payments.
4. The Overview section lists the basic information about the project. You can edit values for all the fields except for the **Project ID** and the **Created By** fields, which are system generated. The field descriptions are detailed under [Adding a New Project](#).
 - o A graphical chart displays the top five transactions and their percentage fees distribution, calculated using the transaction total fees from all the assignments for the project.. Others accounts to the fees from the rest of the transactions assigned to the project.
 - o The Primary Contact section displays the details of the contact that was entered at the time of creating the project. You cannot edit the values for these fields on this page.

Note: You can change the primary contact from the Contacts page.

- o The Fees and Payments section displays:

Page Elements	Description
Total Fees	The sum of all the fee values from all the transactions assigned to the project.
Total Payable	The sum of the payable amounts from all the transactions assigned to the project.
Total Paid	The sum of the amounts paid for all the transactions assigned to the project.
Balance Due	The sum of the amounts that is due for all the transactions assigned to the project.



Note:

Balance amount is the difference between the total payable amount and the total paid amount.


The fields in this section are displayed if there is at least one assignment (permit, planning application, or pre-application) for the project. You cannot edit the values for these fields on this page.

5. Click **Save** to save your changes, if any.

Using the Transactions Page


1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Transactions** on the left panel to access the list of transactions that are assigned to the project. The Transactions page provides these details:

Page Elements	Description
Edit	Click to enable the selection of transactions for unassigning them from the project. See Unassigning Transactions from a Project under Adding a New Project .
Assign	Click to open the Assign page and select transactions to assign to the project. See Assigning Transactions under Adding a New Project .
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort	Sort the list of transactions by: <ul style="list-style-type: none"> o Date o Transaction ID o Status
Alert icon	Identify transactions with a status affected by a condition or if they are pending submit.

Page Elements	Description
Transaction	Displays the name and description of the transaction.
Status	Displays the status of the transaction.
Created By	Displays the name of the user who created the transaction, with the date and time of creation.
Applicant	Displays the name, email ID, and contact number of the applicant associated to the transaction.
Property	Displays the address of the property for which the transaction is applied.
Fees	Displays the total fees paid and the balance due, if any.
	Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See Navigating to Planning Application Details .


Using the Inspections Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click Inspections on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

Page Elements	Description
Permit	Displays the permit ID.
Inspection	Displays the inspection ID.
Status	Displays the schedule status of the inspection, for example, Scheduled, Requested, Completed, and Canceled.
Inspector	Displays the inspector assigned to the inspection.
Property	Displays the property associated with the inspection.
Result	Displays the result of the inspection, Pass or Fail.
	Click to access the Inspection Detail page and review the details of the inspection assigned the project. All sections on this page are display-only. See Reviewing Inspection Details .

Using the Fees and Payments Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid. Click Fees and Payments on the left panel to access the details of the fees and payments associated with a submitted transaction. The Fees and Payments page provides these details:

Page Elements	Description
Total Fees	Displays the total amount of fees that may be applicable to the transaction.
Total Payable	Displays the amount of fees that is designated as payable. Fees that are not payable include fees on hold, for example.
Total paid	Displays the amount of the total fees already collected.
Balance Due	Displays the remaining portion of the fees yet to be collected.
Transaction	Displays the transaction ID.
Fee Description	Displays the description of the fee item as defined when creating a fee item.
Amount	Displays the amount due for each fee item.
Currency	Displays the currency in which the transaction will be paid.
Status	Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due.
Assessed Date	Displays the date the request for payment was issued.
Payment Date	Displays the date payment was received.
Payment Reference	Displays the payment reference issued for the transaction.
Invoice	Displays the invoice number of the agency associated with the permit transaction application.
	Click to access the Fee Item Details page and review the details of the fees.

Using the Attachments Page

Attachments provide supporting documentation needed by users while managing projects. You view a list of files and upload or download documents associated with your project on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.

2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Attachments** on the left panel to access the attachments associated with the project. The Attachments page provides these details:

Page Elements	Description
File Name	View the following information in the Filename field: <ul style="list-style-type: none">o Filename with file type extensiono File Sizeo Uploaded By user nameo Uploaded On date
Description	View the description of the attachment as entered by the user who added the attachment.
Category/ Subcategory	View the document category and subcategory for the attachment. This field appears only if a document group is set up on the Project Type Details page while setting up the project type. See Setting Up Project Types .
Actions	Click the actions icon to select and perform an action: <ul style="list-style-type: none">o View Detailso Downloado Delete

4. Click the **Sort By** to view attachments grouped by these fields: file name, file size, uploaded by, uploaded on, description, category, and subcategory.
5. To find a specific attachment, you can enter values in the search field.

Adding Project Attachments

You upload files to the Attachments page using the Add Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Add** icon.
5. Select the file to upload in the browser dialog box and click **Open**. The filename appears on the Add Attachments page.
6. On the Add Attachments page, you can enter a description of the file, a document category, and a document subcategory, if desired.
7. Use the look-up prompt to select a document category and subcategory that have been defined by the agency. For more information, see [Setting Up Document Categories and Subcategories](#).
8. Click the **Upload** button.

Downloading Project Attachments

You download a document on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. In the attachments grid, click the **Action** icon for the document you want to download.
5. Select **Download** and save to the location of your choice.


Deleting Project Attachments

You can use this method for deleting one or more documents.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Edit** icon above the grid.
5. Select one or more documents to delete.
6. Click the **Delete** icon.
7. To delete a single document, access the Attachments page, and select **Delete** in the Action menu for the document you want to delete.

Using the Contacts Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Contacts** on the left panel to access the list of contacts that are added to the project. You will see the primary contact that was added at the time of creating the project.
4. Click the **Details** button for the contact record to open the Contact Details page. You can view the contact details and edit certain fields.

 **Note:** You cannot delete a primary contact or turn off the **Primary Flag** option. Only agency staff such as an administrator can select from the registered profiles to assign a primary contact. Such an assignment will automatically update the earlier primary contact as not primary.

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:
 - o Add a contact from registered contacts: You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.

As a user, you cannot make primary contact assignments for your project. Only agency staff such as an administrator can assign a primary contact from the registered profiles.

The primary contact that was selected at the time of creating the project will longer be a primary contact.

- o Add a brand new contact manually: You create a new contact by entering all the contact details and then include in the transaction.

Again, as a user, you cannot make primary contact assignments for your project.

Related Topics

- [Applying Conditions to Applications](#)

4 Managing Property Information

Working with Parcel Attachments

Attachments provide supporting documentation needed by agency staff to manage parcels. You view a list of files and upload or download documents on the Attachments page.

Viewing Parcel Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.

 **Note:** You can also access these pages through the Property Information menu in the Navigator.

2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. On the Attachments page, view the list of parcel attachments, including this information:

Page Element	Description
Filename and Description	View the filename and description entered by the user upon upload.
File Size	View the size of the attachment.
Category and Subcategory	View the document category and subcategory for the attachment.
Actions	Click to select an action: <ul style="list-style-type: none">○ View Details: Select to view detailed information about the attachment.○ Download: Select to download the attachment.○ Delete: Select to delete the attachment. You will be prompted to confirm the permanent deletion.

Adding Parcel Attachments


1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.

 **Note:** You can also access these pages through the Property Information menu in the Navigator.

2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. Click **Add**.
5. Select the file to upload in the browser dialog box and click **Open**.

The filename appears on the Add Attachments page.

6. On the Add Attachments page, enter a description of the file, a document category, and a document subcategory.

 **Note:** The description, document category, and document subcategory fields are optional and can be left blank.

For more information on document categories and subcategories, see [Setting Up Document Categories and Subcategories](#).

7. Click the **Upload** button.

Deleting Parcel Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.

 **Note:** You can also access these pages through the Property Information menu in the Navigator.

2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. Click **Edit**.
5. Select the check boxes next to all the attachments that you want to delete.
6. Click **Delete**. You will be prompted to confirm the permanent deletion.

 **Note:** You can delete a single attachment on the Attachments page by selecting **Delete** in the **Actions** menu.

Applying Conditions to Parcels



Agency staff can apply conditions to parcels so that users interacting with that parcel are notified of any issues with the parcel.

Agency staff apply, modify, and resolve parcel conditions on the Conditions page. The Conditions page lists all of the conditions applied to the selected parcel, with applied conditions at the top followed by resolved conditions. The condition indicator at the top displays the most severe condition having a high priority. Click the **All Conditions** link at the top of the page to open a modal window that displays all the active conditions applied along with their severity, applied date, and display message.

Applying a Condition to a Parcel

1. Click **Parcel** on the Agency Springboard.
Select a parcel on the Parcel page.
Click Conditions in the navigation bar.
2. Click **Apply Condition**.
3. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	Select the condition that you want to apply. For more information on conditions, see Setting Up Conditions .

Page Element	Description
Severity	<p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none">○ Lock: This severity suspends all operations and selects all business rules for the condition.○ Hold: This severity enables agency staff to select the business rules that apply to the condition.○ Notice: This severity functions as an alert and has no effect on operations.
Business Rules	<p>Select the Prevent New business rule.</p> <p> Note: The business rule is available for selection based on the severity of the condition you select. For example, for a condition with a Hold severity you must select the business rule, and for a condition with a Lock severity, the business rule is automatically applied.</p>
Additional Information	<p>Enter additional information for the condition.</p>
Display Message	<p>Displays the message associated with the selected condition.</p>
Priority	<p>Select a priority for the condition. Values are High, Medium, and Low.</p>
Description	<p>Displays the description associated with the selected condition. You can edit this text.</p>
Inherit to Transactions	<p>Turn on the switch to inherit the condition to all the new transactions that will be associated with the selected parcel.</p> <p>The following business rules are also inherited, If selected at the time of applying the condition:</p> <ul style="list-style-type: none">○ Prevent Workflow Advancing○ Prevent Issue or Final○ Restrict Payment○ Prevent Inspection Schedule○ Prevent Inspection Result <p> Note: The business rules listed above appear for selection only when the Inherit option is selected. The condition setup determines whether the Inherit switch is turned off or on by default.</p> <p>For more information on business rules, see Setting Up Conditions.</p>

4. Click **Save**.

Resolving a Condition

You can resolve a condition that you applied to a parcel. If you resolve the parcel condition, the condition that was inherited by any transactions associated with the parcel will also be automatically resolved.

1. Click **Parcel** on the Agency Springboard.

Select a parcel on the Parcel page.

Click Conditions in the navigation bar.

2. Click Resolve for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Click **Save**.

Modifying a Condition

1. Click **Parcel** on the Agency Springboard.

Select a parcel on the Parcel page.

Click Conditions in the navigation bar.

2. Click the View More Details button for the condition you want to modify.
3. On the Condition Details page you can update the priority, description, and additional information for the condition.

 **Note:** You can't edit any fields for a resolved condition.

4. Click **Save**.

5 Working with Payments

Payment Flow Overview

This topic provides a high-level overview of fees and the payment flow. Applicants can make payments online, and agency staff can assist applicants with payments.

After completing an application for a permit, the fees are calculated and applied to the applicant's account. The applicant manually adds fees to the payment cart, and selects which fees to pay in one transaction. Agency staff can initiate payment from the Permits list page or from the fees and payments page in the permit details. System processing for payments triggers workflow and generates accounting and invoices.

For information about setting up fees and payments, see the documentation for Implementing Oracle Public Sector Permits.

Understanding Fees

Some basics about fees include the following:

- Fees for a permit are determined by decision modeling and associated with fee schedules.
- Fees may be applied during the application process or later for additional fees or adjustments.
- Fees appear on the My Permits page for applicants, on the Permits list page for agency staff, and on the Fees and Payments page in the permit details for both agency staff and applicants.
- If a condition is applied to the permit, such as a hold or lock on the permit, the applicant may not be able to pay until the condition is resolved.
- Agency staff can add or adjust fees on the Fees and Payment page in the permit details.

Fee Payments Process for Applicants

Applicants can make a payment by following this process:

1. On the My Permits page, add fees items to the payment cart.
2. Select fees for payment in the payment cart.
Fees not selected for payment remain in the cart.
3. Click the **Continue to Checkout** button.
4. Review the Checkout page, which lists the different secured payment methods available.
Only agency staff can process cash and check payments.
5. Select one of the payment methods for payment processing.
Depending on the payment service being used, the payment steps differ.

After successful payment, the applicant is returned to the My Permits page.

Fee Payments Process for Agency Staff

Agency staff can use the following process to assist an applicant with a payment:

1. Click the **Pay** button for a permit listed on the Permits page or on the Fees and Payments page in the permit details.

Agency staff skip the payment cart and go directly to the Checkout page.

2. Review the Checkout page, which lists the different payment methods available, such as cash or check.
3. Select one of the payment methods for payment processing.


Depending on the payment service being used, the payment steps differ.

After successful payment, the agency user is returned to the Permits list page.

Payment Cart Overview

Applicants can pay fees over the Internet using a payment cart and checkout process. The Cart page is used to accumulate fees and review them before making a payment.

The payment cart shows fees associated with applications belonging to one customer profile at a time. When a user switches profiles, the payment cart is updated to show fees for the selected profile.

 **Note:** The payment cart is available only to applicants. Agency staff can process payments from the agency's Applications page as well as from the Fees and Payments page for a specific application. When an agency staff member submits an application on behalf of a registered user, the registered user can see the application on the Applications page and then add the application fees to their payment cart.

Viewing Fees in the Payment Cart Summary

The payment cart icon appears in the global header when a registered user logs into Oracle Public Sector Community Development. The number of items in the payment cart, if any, appears on the icon:

This is an example that illustrates the payment cart icon, showing 17 items for payment in the cart.



Clicking the payment cart icon opens the Payment Cart summary page, which lists the fees that are awaiting payment:

This example illustrates the Payment Cart summary page.

Payment Cart ×

[View Cart](#)

Application Type	Application	Amount
CV Permit	CK-2019-00007	25.00 USD
E2EResPermit	E2E-190218-00011	50.00 USD

Total Amount 75.00 USD

If the cart is empty, the summary of fees is not available.

Clicking the **View Cart** button opens the Cart page.

Paying Fees in the Payment Cart

The system applies fees to the user's account when an application is submitted. The applicant can then move fees into the payment cart, where the fees remain until the applicant pays the fees. Fee adjustments are automatically reflected in the cart before checkout processing.

This example illustrates the Cart page. In this example, the items belong to one or more projects defined by the agency.

Page Elements

Usage





Click to group the fees by Address or Application Type.



Click to sort the fees by Added Date, Application Type, or Application.

Total Amount

Review the number of items to pay now and the total amount selected for payment.

Page Elements	Usage
Application number	Click the application number—for example, RA-2018-0008—to open a page with the application details.
 All projects: <Number of projects>	Click the projects link next to the application number to see a list of the projects to which this application belongs.
Application type	View the type of application, such as Residential Addition.
Fee amount	View the fee amount for the application, for example: \$215.17. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees and the total fees due for the application.
	The Fee Amount Changed alert indicates the fee has been adjusted. Adjusted fees are updated automatically in the cart before checkout processing.
Property address	View the location of the property to which the fee applies.
Aging information	View the aging information for the fee, for example: Added 5 days ago.

Conditions that have been applied to the application appear as icons next to the application ID. For more information about conditions, see [Applying Conditions to Applications](#) and [Setting Up Conditions](#).

After reviewing fees, the applicant can choose from several actions:

Page Element	Usage
Continue to Checkout	Click the button to continue to checkout with the fees selected to pay now.
Pay Now	Select the fees for payment by turning on the Pay Now switch.
Remove from Cart	Click to remove a fee from the cart. Removing fees from the cart does not affect the application. The user can make changes to the application if needed and add the fees to the cart later.
Return to Applications	Click the link to return to the user’s Applications page.

The system validates the application in the payment cart and identifies applications with a conditional status. The applicant must correct any conditions associated with an application before proceeding to checkout.

Users cannot make any changes to the application and associated fees submitted for payment during processing. After the payment processing is complete, the items are removed from the cart, and the system directs the user back to the Cart page to pay remaining fees. If the cart is empty after a successful payment, the user is directed their Applications page. If the payment fails, the fees remain in the cart and can be updated or resubmitted for payment.

Working with Cashier Sessions

Cashier sessions are instances of a cashier using a specific cash drawer to receive payments from customers. Cashiers add and modify cashier sessions on the Cashier Session page.

Opening a Cashier Session


1. Select **Billing and Payment** > **Cashier Sessions** .
2. On the Cashier Session page, click **Add**.
3. On the Cashier Session Details page, enter values for the following fields:

Page Element	Description
Cashier Drawer ID	Select the cash drawer that you want to use for this session.
Session ID	Displays the unique, system-generated ID for the cashier session.
Start Time	Displays the date and time the session was created.
Status	All new cashier sessions have a status of Open.
Cashier ID	Displays the unique ID of the cashier who is opening the cashier session. Administrators assign cashier IDs to agency staff on the Agency Staff page. You cannot open a cashier session if you do not have a cashier ID assigned to you.
Opening Balance	Enter the amount in the cash drawer at the beginning of the cashier session.

4. Click **Save**.

Modifying a Cashier Session

1. Select **Billing and Payment** > **Cashier Sessions** .
2. Click a row with a status of Open or Suspended on the Cashier Session page.

 **Note:** You view cashier sessions with a status of Closed, but you can't edit them.

3. On the Cashier Session Details page you can:
 - o Suspend an open cashier session by setting the **Status** to Suspended.
 - o Reopen a suspended cashier session by setting the **Status** back to Open.
 - o Close a cashier session by setting the **Status** to Closed. When you close a cashier session enter an amount for the **Closing Balance**.

 **Note:** The system populates the **End Time** field with the date and time the session was closed.

4. Click **Save**.

Printing Deposit Slips

Agencies that collect payments use deposit slips to deposit the money collected in the form of cash and checks into the Agency's bank account.

You print deposit slips using the Print Deposit Slip page.


Prerequisites

Before you generate deposit slips for your agency, you must define the P_DEPOSIT_SLIP_NUMBER parameter for the DepositSlip001 report. For more information on defining report parameters, see [Setting Up Reports](#).


Generating Deposit Slips

1. Select **Billing and Payment, Deposit Slip**.
2. On the Print Deposit Slip page, enter values for the following fields:

Page Element	Description
Agency ID	Select the agency for which you want to print a deposit slip.
From Receipt Date and To Receipt Date	Select the date range of receipts that you want to include in the deposit slip.
Payment Method	Select the payment methods that you wanted to include in the deposit slip. Options are Cash, Cashier Check, and Personal Check .
Cash Drawer ID	Select a value to print a deposit slip for the receipts of a specific cash drawer. If you leave this field blank, the deposit slip will include all cash drawers for the specified date range.
Session ID	Select a value to print a deposit slip for the receipts of a cashier session. If you leave this field blank, the deposit slip will include all cashier sessions for the specified date range.
Cashier ID	Select a value to print a deposit slip for the receipts of a specific cashier. If you leave this field blank, the deposit slip will include all cashiers for the specified date range.

 **Note:** The values available in the Cash Drawer ID, Session ID, and Cashier ID drop down fields represent the cash drawer payment history rows within the entered date range that have not yet been printed. Therefore, the values available in the drop down fields change based on the entered date range. If a selected drop down value becomes invalid because you change the date range, the field with the invalid value becomes blank. If the selected drop down value remains valid after changing the date range, the drop down value is unchanged.

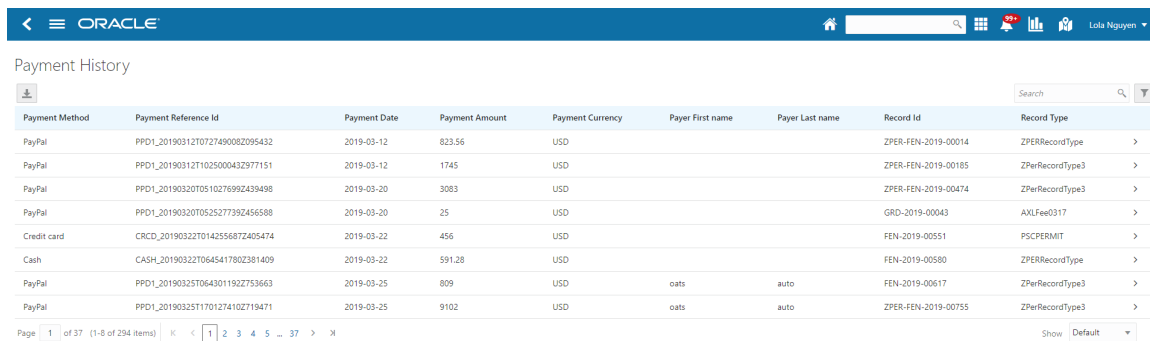
3. Click **Print**. The generated deposit slip PDF opens in a separate browser tab.

 **Note:** If your browser has a popup blocker, make sure it allows popups from the URL associated with Oracle Public Sector Compliance and Regulation.

Viewing Payment History

Agency staff can view payment history on the Payment History page.

This example shows the Payment History page.




The screenshot shows the Oracle Payment History page. At the top, there is a navigation bar with the Oracle logo and a search bar. Below the navigation bar, the page title "Payment History" is displayed. A search bar is located on the right side of the table. The table contains the following data:

Payment Method	Payment Reference Id	Payment Date	Payment Amount	Payment Currency	Payer First name	Payer Last name	Record Id	Record Type
PayPal	PPD1_20190312T0727490082095432	2019-03-12	823.56	USD			ZPER-FEN-2019-00014	ZPERRecordType
PayPal	PPD1_20190312T1025000432977151	2019-03-12	1745	USD			ZPER-FEN-2019-00185	ZPerRecordType3
PayPal	PPD1_20190320T0510276992439498	2019-03-20	3083	USD			ZPER-FEN-2019-00474	ZPerRecordType3
PayPal	PPD1_20190320T0525277392456588	2019-03-20	25	USD			GRD-2019-00043	AXLFee0317
Credit card	CRCO_20190322T0142556872405474	2019-03-22	456	USD			FEN-2019-00551	PSCPERMIT
Cash	CASH_20190322T0645417802381409	2019-03-22	591.28	USD			FEN-2019-00580	ZPERRecordType
PayPal	PPD1_20190325T064301192753663	2019-03-25	809	USD	oats	auto	FEN-2019-00617	ZPerRecordType3
PayPal	PPD1_20190325T1701274102719471	2019-03-25	9102	USD	oats	auto	ZPER-FEN-2019-00755	ZPerRecordType3

At the bottom of the table, there is a pagination bar showing "Page 1 of 37 (1-8 of 294 items)" and a "Show Default" dropdown menu.

Reviewing Payment History

1. Select **Billing and Payment > Payment History** in the navigator.

 **Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting View Payment History from the **I Want To** field. Public users can view only the payments that they submitted.

The Payment History page displays all of the payments received by the agency. You can search for and sort payments by:

- Payment method
- Payment reference ID
- Payment date
- Payment amount
- Payment currency
- Payer first name
- Payer last name
- Record ID
- Record type

2. Select a payment to view additional details on the Payment History Details page.

This example shows the Payment History Details page.

The screenshot shows the Oracle Payment History Details page. At the top, there is a navigation bar with the Oracle logo and user information (Lola Nguyen). Below the navigation bar, the page title is "Payment History Details". The main content area contains a form with the following fields:

- Agency: 1
- Payment Method: Cash
- Payment Reference Id: CASH_20190402709524844281691
- Payment Date: 2019-04-02
- Payment Amount: 432
- Payment Currency: USD
- Payer First name: (empty)
- Payer First name: (empty)

Below the form, there are two tables:

Payment History Lines


Line	Item Description	Item Amount	Item Currency
1	First fee item 1	432	USD

Cash Drawer Lines

Line	Receipt Number	Payment Amount	Payment Currency
2	23	32	USD
1	23	400	USD

The Payment History Lines grid displays the transaction lines associated with the payment. You can select a payment history line to view additional details on the Payment History Line Details modal page.

The Cash Drawer Lines grid displays the cash drawer transaction lines associated with the payment. You can select a cash drawer line to view additional details on the Cash Drawer Line Details modal page.

 **Note:** The Cash Drawer Lines grid does not appear for electronic payments.

6 Working with Accounting

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

This page displays the fee items for agency transactions that require accounting journals. Each fee item row displays the transaction ID of the transaction from which it originated and the name of the source table that contains the detail for that transaction. These accounting transactions are processed by the Generate Accounting process.

Viewing Accounting Transactions

1. Select **Accounting > Accounting Transactions** , or click **Accounting Transactions** on the Agency Springboard.
2. Select an accounting transaction on the Accounting Transactions page to view additional information about the transaction.

Each accounting transaction has one of the following statuses:

- o Created: The Generate Accounting process couldn't create a journal for the accounting transaction because there is no applicable accounting rule.
- o Generated: The Generate Accounting process created a journal for the accounting transaction.

For accounting transactions with a status of Generated:, the **Journal** grid displays information about the journal entry associated with it including the Journal ID, Accounting Event, and Journal Status. For more information on journal entries, see [Reviewing Journal Entries](#).

The **Accounting Transaction Errors** grid displays any error messages associated with the accounting transaction. These errors must be corrected before a journal can be created for the transaction.

Generating Journal Entries

You generate journal entries from the accounting transactions that are created in Oracle Public Sector Compliance and Regulation.

You run the process that generates journal entries on the Generate Accounting page, which you can access by selecting **Accounting > Generate Accounting** .

The Generate Accounting process includes only accounting transactions with a status of Created. The status of processed transactions is changed to Generated. The process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.




Entering Generate Accounting Process Parameters




1. Access the Parameters tab on the Generate Accounting page.
2. Select the **Accounting Event** for which you are generating journal entries.

- Use the **Accounting Date From** and **Accounting Date To** fields to specify the range of accounting dates for which you are generating journal entries.

Scheduling the Process

- Access the Schedule tab.
- To immediately add the process to the queue, select the **As soon as possible** option.
- To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
Frequency	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> ○ Once: Select to run the process one time only. ○ Hourly or minute: Select to run the process at regular time intervals. ○ Daily: Select to run the process at regular intervals in days. ○ Weekly: Select to run the process at regular intervals in weeks. ○ Monthly: Select to run the process on specific days of the month. ○ Yearly: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing. You can leave this field blank to make the process schedule open-ended.
Hours and Minutes	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p> Note: These fields are available only if you select a process frequency of Hourly or minute.</p>
Days	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p> Note: This field is available only if you select a process frequency of Daily.</p>
Weeks	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p> Note: This field is available only if you select a process frequency of Weekly.</p>

Page Element	Description
By day	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the Second and Wednesday options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p> Note: This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.</p>
By date	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p> Note: This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.</p>
Month	<p>Select the months in which you want your process to run.</p> <p> Note: This option and its associated fields are available only if you select a process frequency of Yearly.</p>

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

Viewing Journal Entries

Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- **Created**: Indicates that the journal has been created but not validated.
- **Error**: Indicates that the journal has one or more validation errors.
- **Valid**: Indicates that the journal has been validated and is ready to be exported.
- **Sent**: Indicates that the journal has been exported to a file that can be used to update an ERP system.

Reviewing Accounting Lines

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
 - **Account**
 - **Division**
 - **Department**
 - **Fund**
 - **Function**
 - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

Viewing Journal Entry Errors


1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.

You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

You can create a file containing accounting transactions that can be imported into an Enterprise Resource Planning (ERP) system.

 **Note:** If you use Oracle Financials Cloud as your ERP system, we recommend using the Financials Cloud Subledger Accounting feature to enable ERP accounting integration instead of using the Export Journals to ERP process.

You run the process that exports journal entries on the Export Journals to ERP page, which you can access by selecting **Accounting > Export Journals**.

Entering Export Journals to ERP Process Parameters





Access the Parameters tab on the Export Journals to ERP page and enter values using the following fields:



Page Element	Description
Mapping Name	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see Setting Up Data Format Exchange Maps .
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.
Accounting Date From and Accounting Date To	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Scheduling the Process

1. Access the Schedule tab.
2. To immediately add the process to the queue, select the **As soon as possible** option.
3. To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are:

Page Element	Description
	<ul style="list-style-type: none"> ○ Once: Select to run the process one time only. ○ Hourly or minute: Select to run the process at regular time intervals. ○ Daily: Select to run the process at regular intervals in days. ○ Weekly: Select to run the process at regular intervals in weeks. ○ Monthly: Select to run the process on specific days of the month. ○ Yearly: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing. You can leave this field blank to make the process schedule open-ended.
Hours and Minutes	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p> Note: These fields are available only if you select a process frequency of Hourly or minute.</p>
Days	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p> Note: This field is available only if you select a process frequency of Daily.</p>
Weeks	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p> Note: This field is available only if you select a process frequency of Weekly.</p>
By day	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the Second and Wednesday options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p> Note: This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.</p>

Page Element	Description
By date	Select this option to run the process on specific dates of the month. You can select more than one date.  Note: This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Month	Select the months in which you want your process to run.  Note: This option and its associated fields are available only if you select a process frequency of Yearly.

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Processing the Journal Entry Output

Use the publicSectorMappingAttachments REST API to process the output file generated by the Export Journals to ERP. For more information on this REST API, see [REST API for Oracle Public Sector Cloud](#).


7 Working with Processes


Using the Process Monitor





The Process Monitor enables users to initiate and manage processes for Oracle Public Sector Compliance and Regulation.

This example shows the Process Monitor page.

Process Monitor

Schedule New Process 

Last 12 hours 

Name	Process ID	Status	Submitted By	Submission Time	Scheduled Time	Actions
Export Journals to ERP	14336	Running	SYSTEM_ADMIN	5/8/19 3:08 PM PDT	5/8/19 3:08 PM PDT	 
Generate Accounting	14306	Succeeded	SYSTEM_ADMIN	5/8/19 3:01 PM PDT	5/8/19 3:01 PM PDT	 

Scheduling a New Process

1. Select **Common > Process Monitor**.
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the Generate Accounting process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.

 **Note:** Processes can be run immediately or scheduled to run at a specific time.

6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

Managing Processes

Select **Common > Process Monitor**.

The Process Monitor page displays the following information for each process:

- **Name**
- **Process ID**
- **Status**
- **Submitted By**
- **Submission Time**
- **Scheduled Time**

 **Note:** The **Submission Time** and **Scheduled Time** columns use the time zone specified in the user's preferences, not the time zone for the agency.

Click **Filter By** to filter the displayed process information by Name, Process, and Submission Time.

You can manage processes using the following page elements:

Page Element	Description
Actions	Click the icon in this column to select one of the following actions: <ul style="list-style-type: none">• Put on Hold• Release Process• Cancel Process
View More Details	Click to view additional information about the process on the Process Details page.

8 Using the Digital Assistant

Overview of Digital Assistant

Create your own digital assistant from scratch using your Oracle Digital Assistant instance and configure its parameters to suit your requirement before making it available for your users.

Create and add skills to your digital assistant. You can also use the Oracle delivered sample skills and re-configure its parameters, or clone the skill for the digital assistant you create.

Enable your digital assistant to provide generic information about processes or answer specific questions about your offerings, and enlist your own set of frequently asked question with answers.

Asking Details

The delivered digital assistant skills, for example, facilitates responses and recommendations to questions raised by an anonymous user regarding the permitting process:

- With the PERMIT SEARCH skill, the digital assistant can access information from the Permit implementation and list the permits that match one of the search parameters – Permit Number, Parcel ID, and Street. Users can also review the permit detail page, if they want to look into a permit they just searched.
- With the PERMIT RECOMMENDATIONS skill, the digital assistant can access information from Oracle Policy Automation (OPA) and list permit recommendations. The skill prompts the user with questions from the OPA questionnaire and retrieves a list of recommended permits based on the user's responses to the questions.

For details on configuring your digital assistant for use, such as intents and the dialog flow, see the documentation [Configure for Use in a Digital Assistant](#).

Asking Questions

Your digital assistant can store a list of questions and answers to be available as Frequently Asked Questions (FAQs) regarding the processes your agency follows.

The content for the FAQs are entered in a spreadsheet and attached to the digital assistant. The Oracle delivered spreadsheet can be updated with information from your knowledge-base.

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).

9 Using Accessibility Features

Overview of Accessibility

This topic provides an overview of the approach towards accessibility in the Public Sector Compliance and Regulation services.

The Public Sector Compliance and Regulation services are developed with the latest industry standards for accessibility in mind, which is in keeping with the overall development approach within Oracle.

Oracle recognizes the need for our applications, and our customers' and partners' products built with our tools, to be usable by the disabled community. The Oracle Accessibility Program Office, reporting to the office of the Chief Corporate Architect, is responsible for defining the corporate standards for accessibility, and developing materials to train all employees so that they can successfully create products that meet those standards.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

Oracle uses the Voluntary Product Accessibility Template (VPAT) to represent the degree of conformance to various accessibility standards and guidelines, including Section 508 (as released in 2001), WCAG 1.0, and WCAG 2.0. Depending on when a product was developed and released, different standards may be listed. Oracle is an active member on the ITI group that is working to enhance the VPAT to address future standards.

For more information about Oracle's published VPAT documents, see the Product Status (VPATs) page at <http://www.oracle.com/us/corporate/accessibility/vpats/index.html>.

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

Keyboard Shortcut	Description
<TAB>	This is the primary key used by all keyboard users to move from each control that can accept focus. <ul style="list-style-type: none">• Use <TAB> to select any actionable or field just like you can use the mouse to select any field on the page.• For folder tabs, the <TAB> key will take you to a tab, and then you have to use other keys to select and navigate within that tab.• For radio buttons the <TAB> key will take you to the first radio button in a radio button set, and then you have to use other keys to select items within the radio button set.• For drop-down lists, the <TAB> key will take you to the list field, and then you have to use other keys to move through values and select values.
<SHIFT>+<TAB>	This keyboard combination works the same as <TAB>, except it works in the opposite direction. For example, it enables you to switch focus to the previous control or field, rather than the next control or field.

Keyboard Shortcut	Description
<SPACEBAR>	Use for: <ul style="list-style-type: none">• Selecting a tab• Activating a button• Selecting a check box• Selecting a radio button that is not selected
<ENTER>	Use to: <ul style="list-style-type: none">• Press a button.• Click a link.• Select an item from a drop-down list.
<DOWN ARROW>	Use for: <ul style="list-style-type: none">• Moving through values in a drop-down list• Selecting different values in a set of radio buttons• Moving between different folder tabs
<UP ARROW>	Works the same as the <DOWN ARROW>, except it enables you to move in the opposite direction (previous instead of next).
<LEFT ARROW>	Works similar to the <UP ARROW>.
<RIGHT ARROW>	Works similar to the <DOWN ARROW>.
<HOME>	When in the context of tabs, sets focus to the first tab.
<CTRL>+<HOME>	Takes you to the very top of a page.

Using the Keyboard with Data Collections

This topic describes examples of how to use keyboard shortcuts to navigate within the various collections, such as tables and lists, and select actionable items.

Tables

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.

Country

Country Code	ISO Alpha 2 Code	ISO Numeric 3 Code	Country Name
COG	CG	178	Congo >
COK	CK	184	Cook Islands >
COL	CO	170	Colombia >
COM	KM	174	Comoros >
CRI	CR	188	Costa Rica >
CUB	CU	192	Cuba >
CUW	CW	531	Curacao >
CXR	CX	162	Christmas Island >
CYM	KY	136	Cayman Islands >
CYP	CY	196	Cyprus >
DEU	DE	276	Germany >

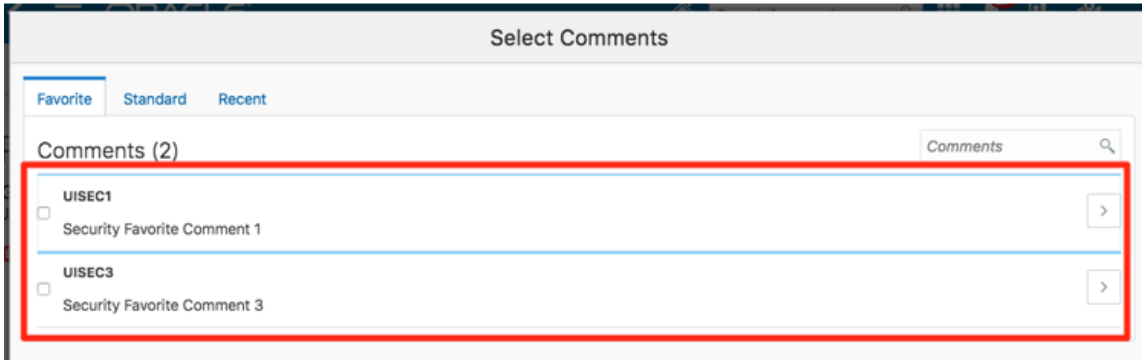
Page 1 of 22 (1-11 of 240 items) | < > | 1 2 3 4 5 ... 22 > >>

Target	Key	Description
Cell	Tab	The first Tab into the table moves focus to the first column header.
		The second Tab moves focus to the next focusable element outside of the table.
		If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row.
		If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.
	Shift + Tab	The first Shift+Tab into the table moves focus to the first column header.
		The second Shift+Tab moves focus to the previous focusable element outside of the table.
		If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row.
		If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.
	Down Arrow	Move focus to the next row.
	Shift + Down Arrow	Select and move focus to the next row.

Target	Key	Description
	Up Arrow	Move focus to the previous row. If at the first row, then move to the column header.
	Shift+Up Arrow	Select and move focus to the previous row.
	Home	Move focus to first row.
	End	Move focus to last row.
	Space	If chevron icon is used, drill down to the detail.
	Enter	Toggle the current row to actionable mode if there exists a tabbable element in the row. Once toggled to actionable mode, focus will be moved to be first tabbable element in the row.
	F2	Toggle the current row to actionable mode if there exists a tabbable element in the row.
Column Header	Tab	Navigate to next focusable element on page (outside table).
	Shift+Tab	Navigate to previous focusable element on page (outside table).
	Down Arrow	Move focus to the first row.
	Left Arrow	Move focus to previous column header.
	Right Arrow	Move focus to next column header.
	Home	Move focus to first column header.
	End	Move focus to last column header.
	Space	Select column.

List View

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.



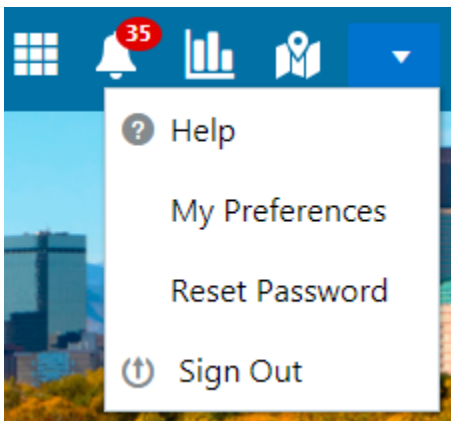
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item. No op if the item is already selected.

Using the Keyboard to Work with Page Controls

This topic describes examples of how to use the keyboard to work with various controls in the interface and select actionable items. Controls are UI constructs such as buttons, accordions, page tabs, and so on.

Buttons

This section describes how to use the keyboard to control buttons in the global header or on pages.



Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

Calendar

This section describes the hot keys you can use when working with the calendar control and date picker to select date field values.

Auto Number Rule | Electrical Permit 🔍

* Valid from Date 📅

Valid to Date 📅

Public User Enabled

* Department

Workflow Space Name

Workflow Application ID

< July 2018 >

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

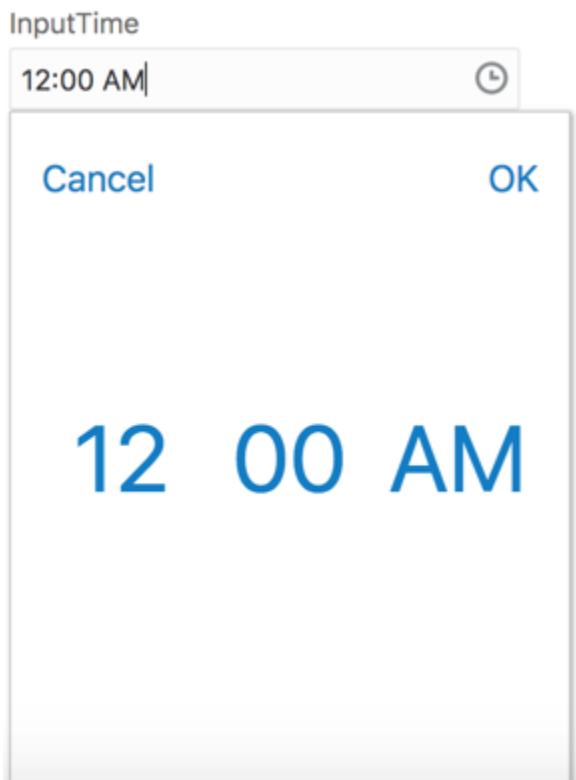
Today

Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calendar grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
	Enter	Select the currently focused day
Picker	Up Arrow	Move up in the grid.
	Down Arrow	Move down in the grid.
	Right Arrow	Move right in the grid.
	Left Arrow	Move left in the grid.
	Esc	Close the grid.

Target	Key	Description
	Home	Move focus to first day of the month.
	End	Move focus to last day of the month.
	Page Up	Switch to previous month.
	Page Down	Switch to next month.
	Alt + Page Up	Switch to previous year.
	Alt + Page Down	Switch to next year.
	Ctrl + Alt + T	Places focus on Today button if it exists.

Time

This section describes the hot keys you can use when working with the time picker control to select time field values.



Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker

Key	Description
Tab In	Set focus to the input. If hints, title, or messages exist in a note window, displays the note window.

Accordion

This section describes the hot keys you can use when working with the accordion control to expose and access items. An accordion is a set of expandable sections where only one section can be expanded at a time. When a new section gets expanded, the previous section automatically closes.

Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements

Group box

Text field

Number field

Date time field

Switch

Text area

Radio button set

Check box set

Drop-down list

Multi-Select list

The following table lists the keyboard options for working with the collapsible headers.

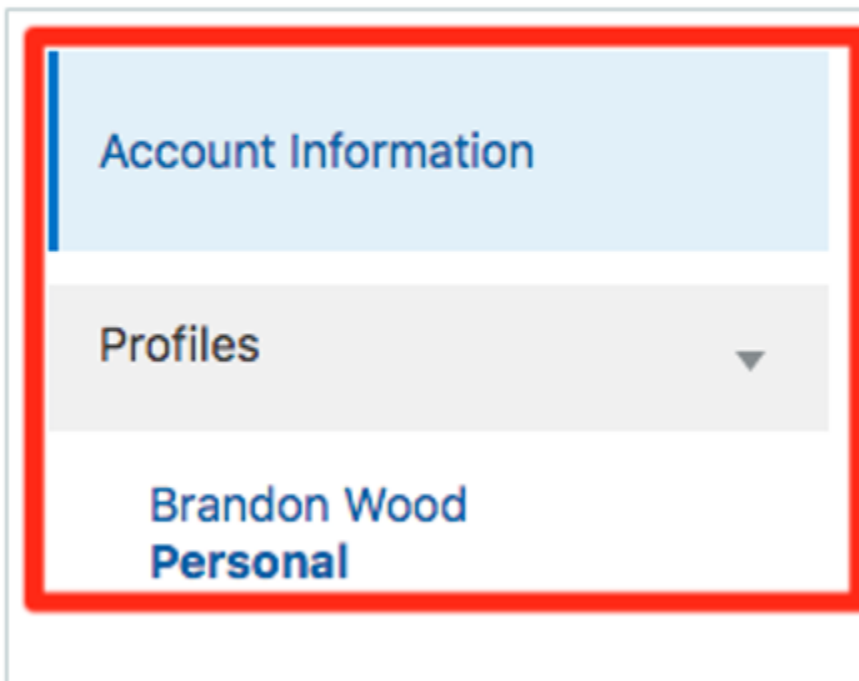
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift + Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move focus to the previous collapsible header with wrap around.
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.

Key	Description
Home	Move focus to the first collapsible header.
End	Move focus to the last collapsible header.

Navigation Lists

This section describes how to use the keyboard to work with navigation lists to access items used take you to different locations or display additional content.

Manage Account



The following table lists the keyboard options used for accessing list items.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to next visible item.

Key	Description
Left Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift + Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

Tab Bars

This section describes how to use the keyboard to work with tab bars.



Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item.
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl + X	Marks the current item to move if reorderable is enabled.

Key	Description
Ctrl + V	Paste the item that are marked to directly before the current item
DELETE	Delete the current item.