Oracle Public Sector Compliance and Regulation Cloud

Using Community Development Permits

January 2020

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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.
monospace	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.

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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.

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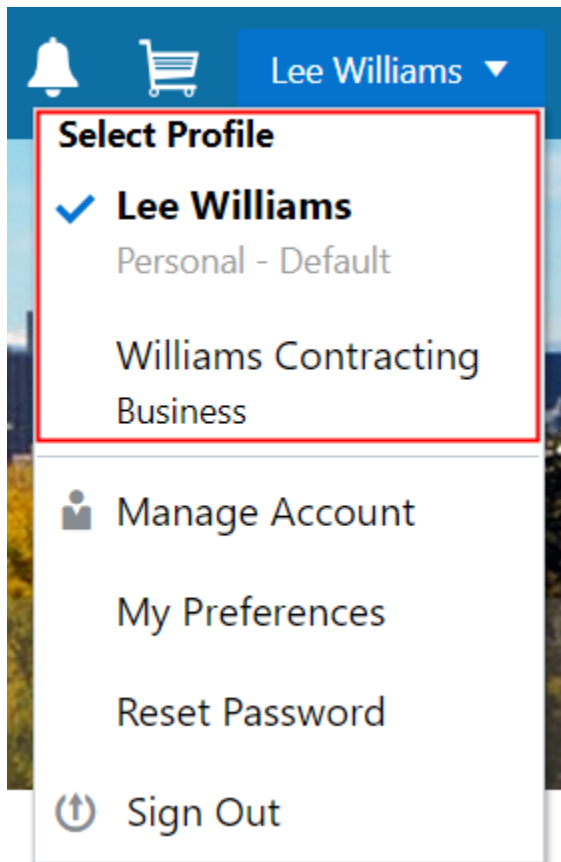
A user who has multiple profiles can switch to another profile on pages that contain profile-sensitive information. When the user changes profiles on a profile-sensitive page, the data on the page reloads to show the selected profile's data. If the page isn't profile-sensitive, the user can go to the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

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.

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- 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.

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Register

* Account Use	○ Personal	● Business
Are You a Contractor?	(toggle off)	Add License
Mask My Contact Information from Public View	(toggle off)	
Salutation	(dropdown)	
* First Name		
* Last Name		
* Business Name		
* Email Address		
* User Name		
Phone	(dropdown)	Ext.

Terms and Conditions
Read and accept the terms and conditions before proceeding

Register

Entering Registration Information

Users enter the following registration information.

Page Element	Description
Account Use	Indicates whether this is a personal account or a business account. 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. For more information about profiles, see *Overview of Public User Accounts and Profiles*.
Are You a Contractor?	The user's contractor status is associated with the default profile that is created during the registration process. 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. Clicking the **Add License** button opens the Contractor License Details page, which includes these fields: **License Type, License Number, Issued On,** and **Expiration Date.** After the user saves license information, the **Add License** button changes to an **Edit License.** button.

Page Element	Description
	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*. **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.
Mask My Contact Information from Public View	Gives the user the option to mask their name and contact information when a member of the public views the user's applications. This question appears only if it is enabled on the Public User Setup page. The default answer to this question is No. 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.
Salutation	A title such as Ms. or Mr. that is used to address the person. This field is optional.
First Name and **Last Name**	The user's name, which is the same across all of the user's profiles.
Business Name	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.
Email Address	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. 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. 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.
User Name	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. Note that the user does not select a password at this point. Password creation occurs after the user submits registration information.
Phone	A phone number for the account holder. This field is optional.

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.

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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 account menu that appears in the page header.

   A drop-down menu appears.

   This example illustrates the account menu under the current profile name.

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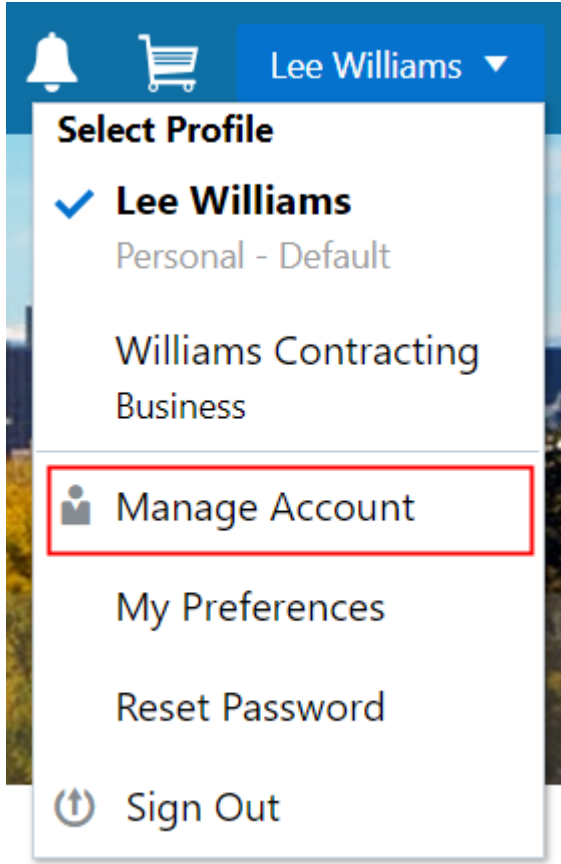
3. Select **Manage Account.**

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.

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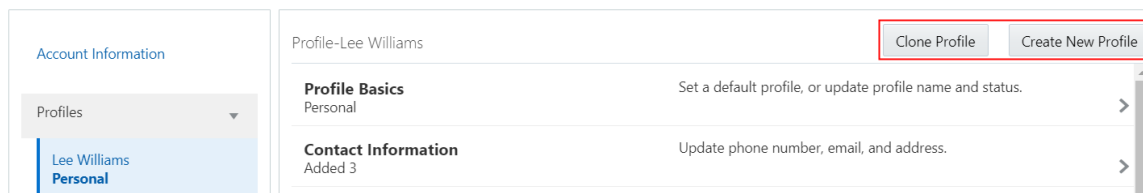
Creating a New Profile

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.

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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.
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.

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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 account menu 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.

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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.**

   c. Click **Save** to save changes and close the page.

4. To view account access information:

   a. Click the **Access** item in the right frame.

      The Access page appears.

   b. Review the following read-only fields: **User Name** and **Email.**

      This email is the one that was provided during registration. It is used for account access notifications such as those related to setting passwords and changing or verifying account or profile information.

   c. Click **Cancel** to close the page.

5. To view or update additional information:

   a. Click the **Additional Information** item in the right frame.

      The Additional Information page appears.

   b. Review or update the setting for the **Mask My Contact Information from Public View** check box.

   c. Click **Save** to save any changes and close the page.

6. To review the most recently accepted terms of use:

   a. Click the **Terms of Use** item in the right frame.

      A window with the full text of the terms of use appears.

      There is no indication if the agency has updated the terms since the user last accepted them. However, with public user self-service, the terms are always current as of the time the user signed into the current session. This is because user must agree to any changes in the terms of use when signing in.

   b. Click the **x** in the top right corner of the window to close it.

Managing Account Attachments

Your agency controls whether attachments can be added to accounts. Set this option on the Public User Setup page. Attachments can be associated with either an account or with a specific profile.

This procedure describes how to manage attachments that are associated with the overall account.

To manage account 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. 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, including attachments. The row for attachments includes information stating how many attachments (if any) have been added. Both account attachments and profile-specific attachments are included in the count.

3. Click the **Attachments** item in the right frame.

   The Attachments window opens. It lists all attachments for the account, including both account attachments and profile attachments. The following information appears:

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.
Category	This column appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories. When visible, this field displays the document category for the attachment. For more information, see *Setting Up Document Categories and Subcategories* and *Setting Up Document Groups*.
Subcategory	This column appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a Licenses category might have subcategories for different types of contractor's licenses. When visible, this field displays the document subcategory for the attachment.
Actions	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.

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Page Element	Description

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. If document groups are enabled for public users, optionally select the appropriate **Category** and **Subcategory** values.

    e. 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. If document groups are enabled for public users, optionally update the **Category** and **Subcategory.**

    e. 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.

    f. 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.

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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
	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. 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. 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.
Profile Type	Displays either Personal or Business. You cannot change the profile type.
Status	Profiles can be Active or Inactive. Only active profiles appear in the Select Profile menu for switching profiles. 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*.

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.

   b. If you are updating a contact method, click the **>** icon at the end of an existing row to open the Details page.

   c. Select the **Type.**

   The Details page displays different fields depending on the type of contact method, but all contact methods include the **Type** field. Address types are Home and Work. Email and Phone types are Home and Business.

   d. If you're adding a new address, either enter the **ZIP Code** or click the **don't know** link.

   Either action reveals additional address fields.

   If you accessed an existing address, the additional address fields are already visible.

   e. Enter the complete contact information: either an address, a **Phone** and **Ext** (extension), or an **Email.**

   f. If this will be the primary address, phone number, or email, select the **Primary** check box.

   Only one contact method of each type can be primary, so if you select the check box, the previous primary address, phone number, or email (if any) is updated to no longer be primary.

   g. Click **Save** or **Cancel** to close the Details page and return to the Contact Information page.
5. To delete a contact method, click **Delete** for the appropriate row.
6. Click **Cancel** to return to the Manage Account page.

Managing Contacts

Contacts are people who can interact with the agency regarding business related to the associated profile. If a user wants a person to be a contact for more than one profile, the system provides a simple way to copy contact information between profiles.

> 🖉 **Note:** When a contact is copied to a new profile, the contact record is duplicated. Information is not kept in sync going forward.

To manage contacts:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Contacts** section to open the Contacts page.
4. To copy existing contacts from other profiles in this account:

   a. Click **Copy from Other Profiles.**

   The Select Contact List page appears. It lists all contacts that are associated with other profiles for this account. A contact who is already associated with multiple profile appears in the list multiple times.

   The contact list displays the contact's name, business name, address, email, and phone number.

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    b. Select one or more contacts to be copied.

    c. Click **Select.**

        The Select Contact List page closes. The selected profile(s) now appear on the Contacts page.

5. To add a new contact or modify an existing contact:

    a. If you are adding a contact, click **Add** to open the Contact Details page.

    b. If you are updating a contact, click the **>** icon at the end of the row to open the Contact Details page.

    c. On the Contact Details page, enter the contact's **First Name, Middle Name, Last Name,** and **Business.**

    d. To enter an address, enter the **ZIP Code** or click the **don't know** link to reveal additional address fields, then enter information in those address fields.

    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.

> **Note:** When users enter contact information in an application, they can create new contacts or choose existing profile contacts. When creating a new application contact, the user can indicate whether the new contact should also be added as a profile contact. When choosing an existing profile contact, the user can modify contact details and indicate whether the original profile contact record should be updated as well.

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	This field is visible if the Public User Setup page is configured to require that contractor status be verified. The default value is Pending verification. Agency staff updates the status to either Verified or Verification failed after independently verifying the user's contractor status.

Page Element	Description
	Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.

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

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	This field is visible if the Public User Setup page is configured to require that accounts be verified. The default value for a new account is Pending verification. 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.

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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.
Category	This field appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories. When visible, this field displays the document category for the attachment. For more information, see *Setting Up Document Categories and Subcategories* and *Setting Up Document Groups*.
Subcategory	This field appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a Licenses category might have subcategories for different types of contractor's licenses. When visible, this field displays the document subcategory for 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:
   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. If document groups are enabled for public users, optionally select the appropriate **Category** and **Subcategory** values.

   e. 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. If document groups are enabled for public users, optionally update the **Category** and **Subcategory.**

   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.**

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.

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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.

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| Page Element	Description

Type (type of request)	Explains what type of information must be verified. Values include:
	
	  o User is a contractor
	
	  o User added or updated license
	
	  o User added or updated trust account

Verification Details	Displays identifying details for a license or trust account. License details include the license number, license type, the date issued, and the expiration date. Trust account details include the account number and status. This column is blank for requests to verify a user's contractor status .
Verification Status	Because this page lists only pending verification requests, all rows initially have the status Pending Verification.

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.

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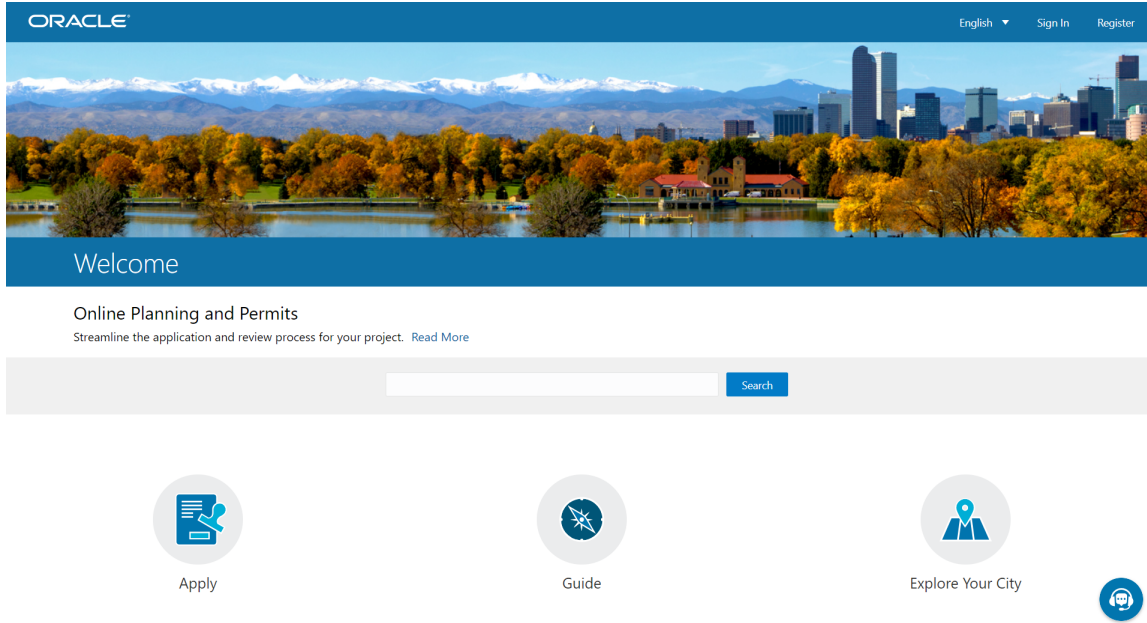
For information about the landing page for agency staff, or Agency Springboard, see *Using the Agency Springboard*.

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
	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. For more information on identifying the OPA policy model to use, see *Setting Up Agencies*
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
🔒 Lock

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	Provides access to a list of the user's own applications, including permit applications and planning applications. The list has a regular list view, a grid view, and a map view. From the list, the user can access application details. The number of active applications appears in the tile label. This number includes both permit applications and planning applications. 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.
Inspections	Provides access to a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.

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Menu Link	Description
	The number of scheduled and requested inspections appears in the tile label.
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. 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*.

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2 Managing Permits

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 looks 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.
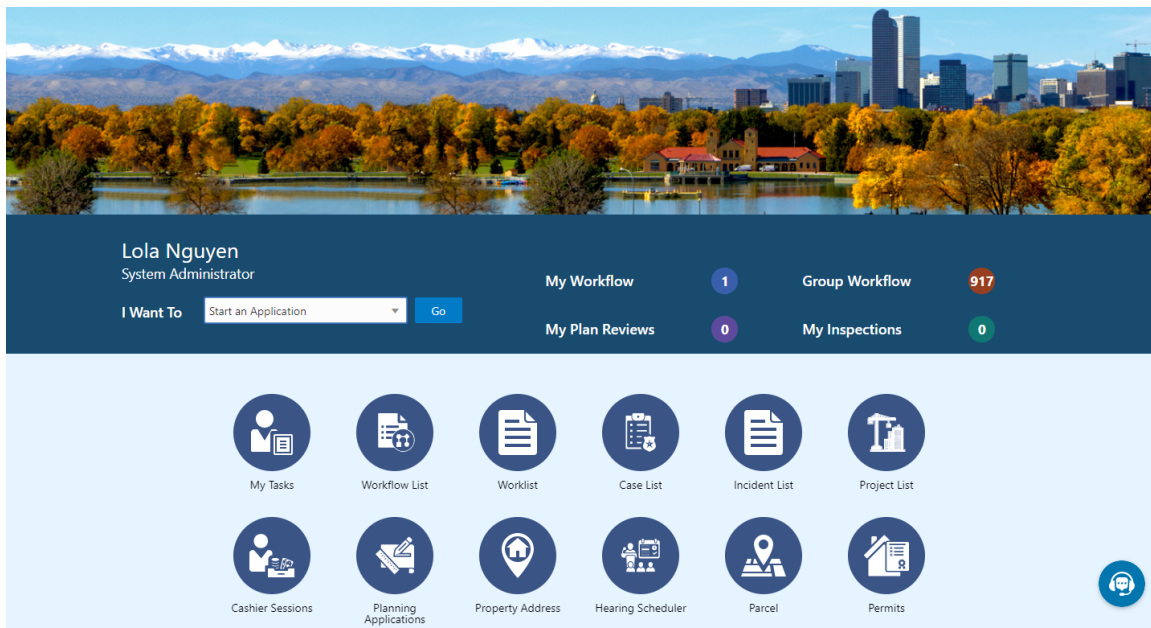
Page Element	Description
Global Banner	The global banner appears as the page header with functionality that might include some or all of these elements:

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Page Element	Description
	• 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.
	• 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.
	• Page finder: If configured by your agency, you can navigate to pages by searching for the page in the page finder.
	• 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	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: • **My Workflow** • **Group Workflow** • **My Plan Reviews** • **My Inspections** **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 do not display My Inspections or My Plan Reviews. For more information about tasks, see *Managing Tasks*.
Tiles	Tiles appear in the springboard section as icons with links to the pages you use to administer specific types of transactions.

For information about setting up these elements on the Agency Springboard, see *Setting Up the Agency Springboard*.
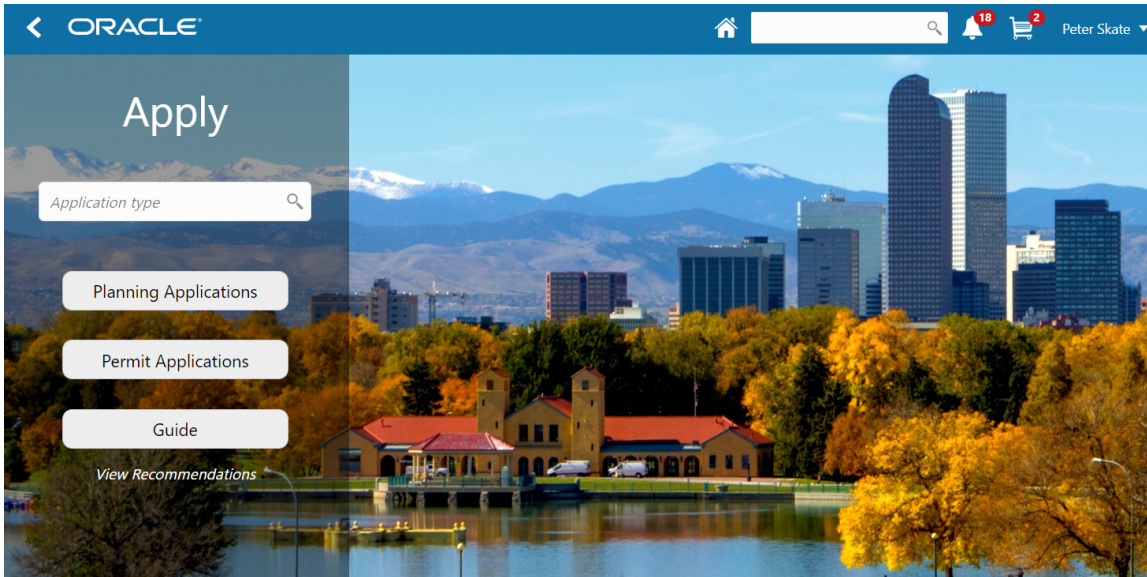
Starting an Application

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.

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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.
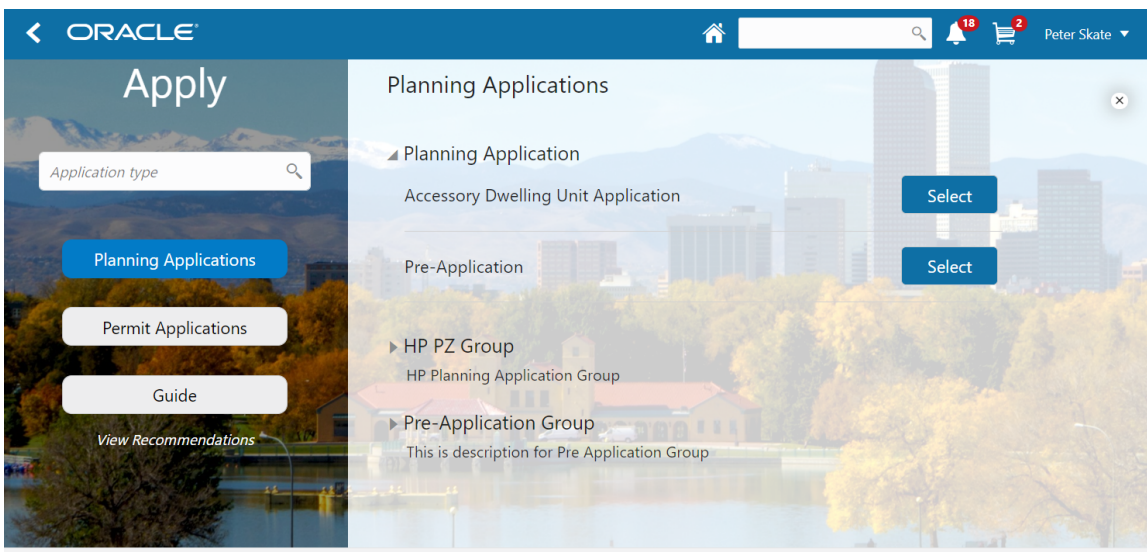
The descriptions of the categories and the application types come from the corresponding setup pages. Initially the overlay displays up to two lines of the description. If the description is longer, an icon at the end of the truncated description enables the user to expand it and see the full description.

If an application type has been configured with a URL for additional information, a **Learn More** link appears at the end of the description. The user clicks this link to open the specified URL.

> **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*.

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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.

   The lists appear 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 users 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.**

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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.

   o 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.
3. Click **Search Saved Recommendations** to open a new window.
4. Enter the **Acknowledgement Number** that was emailed to the user when the recommendations were saved.
5. Enter the **Email**that the user provided when saving the recommendations.
6. 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 enable 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's submitted.

- The **Save** button lets users 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 a 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 list page. You can also perform actions, such as paying fees and accessing detailed application information from here.

> **Tip:** As agency staff, you can access the transactions list 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. Here are some of the things you can do:

- Manage application activity.
- Create or resubmit permit and planning applications on behalf of applicants.
- Cancel pending and payment pending applications on behalf of applicants.

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- 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.

Using the Transactions Page

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. You can go to a specific type of application on the Transactions page:

   - **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, canceled, and withdrawn applications.

3. You can use these actions to display permits or planning applications:

Page Element	Description
Download	Click the download button to export the list to a .csv file.
Search	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. When you search on dates, use this format: MM/DD/YYYY. 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.
Filter By	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. 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.

Page Element	Description
Sort By	Here are some of the sorting options: ○ 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.
Grid View	View the inventory of permits or planning applications on a grid.
Map View	View the inventory of permits or planning applications on an interactive map. The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map. The search and filter options in the map view are the same options that you have in the list and grid views. See *Viewing Map Markers*.

Managing Application Activity

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. You can go to a specific type of application on the Transactions page:

   ○ **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.

   Here are some of the information you can look at:

Page Element	Description
Application	View the application ID, application type, and status. Review the application status, for example, Payment Pending, Submitted, Pending, Permit Issued, and so on.
Property	View parcel information. Review the parcel information, including the street address, if available. 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.
Description	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.
Additional Information	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. Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, Applicant: John Doe. View expiration notifications. For example, Expires in 1 day or Expired on 10/01/2019.
Planner	View the planner assigned to a planning application. This field appears only on the **Planning Applications** list.
Fees	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.
	Select the **Pay** button to submit a payment on behalf of the applicant.
	Select the **Resubmit** button to resubmit an application. The application status is Pending Submit because there may be a problem initiating workflow. Click the **Resubmit** button to retry initiating workflow. Resubmitting the application does not affect the fee calculations.

Page Element	Description
⋮	Select the **Actions** button to access the option for canceling an application. The button appears only when the application has a pending status. Click **Cancel Application** to cancel an application with a pending or payment pending status.

Identifying Transactions Page Icons

The icons on the Transactions page help you identify application activity. Let's look at the icons:

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) 🔒 (Lock) 🏳 (Notice)	Indicates that a condition has been placed on the application. The agency sets up conditions. For more information about conditions, see *Applying Conditions to Applications*.

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 **Apply** on the Transactions page 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.

Created by Joe Green on 12/5/19 Applicant: William Brown	Fees Balance	158.13 USD 158.13 USD
		Copy Application
Created by Lola Nguyen on 12/5/19 Applicant: William Brown	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.

Let's go through the steps 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.

Working with Permit Details

You find permit detail pages in a collection that consolidates all aspects of a permit application, such as contacts, communications, parcel information, fees and payments, plan reviews, inspections, workflow and more.

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

Here's how you access the permit detail pages:

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions page, click the row for a permit.
3. Navigate to permit information using the links in the left panel.

The permit detail pages help you find information about a specific permit:

Page Name	Description
Overview	View the core information regarding the selected permit with links to more detail. See *Viewing the Permit Summary*.
Property Information	View parcel data from the permit application and a map of the parcel location. See *Working with Property Information*.
Workflow	View the workflow status of each task as defined by the agency using Oracle Autonomous Integration Cloud (OIC). See *Using Workflow*.
Application Details	Review information captured during the application intake that is specific to the permit type. For example, for a solar permit, the applicant enters the number of solar panels to be installed. See *Viewing Permit Application Details*.
Plan Reviews	Perform administrative tasks for review cycles as a plan coordinator and perform reviews of building plan documents prior to permit issuance as a plan reviewer on the Plan Review page. See *Managing Manual Plan Review Cycles* and *Managing Electronic Plan Review Cycles*.
Contacts	Review and add contacts for the permit. See *Adding Contacts to Applications*.
Conditions	Review conditions placed on the permit or person that must be resolved to complete the permit process. See *Applying Conditions to Applications*.
Attachments	View a list of files and upload or download documents on this page. *Working with Attachments*.
Comments	Review or add comments pertaining to this permit. *Working with Comments*.
Inspections	Review a consolidated list of inspections related to a permit. As a permit coordinator, you manage inspection activity for the permit on this page. See *Managing Inspections for a Permit*.
Fees and Payments	Review fees assessed and payments due. You can also add additional fee items and pay fee items from this page. See *Working with Fees and Payments*.

Page Name	Description
Projects	View the summary of projects associated with a permit in the permit details. The permit can be assigned to multiple projects. See *Viewing Project Summaries*.
Communications	Send ad hoc email messages and notifications associated with this permit. See *Working with Application Communications* and *Working with Ad Hoc Communications*.
Status History	View the history of application status changes. See *Viewing Application Status History*.
Related Transactions	Create and view links between transactions. See *Working with Related Transactions*.

Viewing the Permit Summary

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

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

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

> **Tip:** As agency staff, you can access this page on a phone as well as on a laptop or desktop computer. The layout and some functionality change based on the device you are using. For more information about using the Overview page on a phone in the Oracle Inspector mobile application, see the *Oracle Inspector Overview for Permits*.

Using the Overview Page

1. Navigate to **Permits** > **Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Transactions page, click the row for a selected permit to open the Overview page.
3. On the Overview page, review details or enter information in the **Overview** section:

Page Element	Description
Status	Review the application status.
Completed Date	Review the date the application was completed.

Page Element	Description
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	Review the expiration date of the application. If the **Extend** link is available next to the **Expiration Date** field, agency staff can enter a new expiration date that allows more time before the application or permit expires. Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the permit type, you might see a notification that the application expires in the displayed number of days. For more information about working with application expiration, see *Application Expiration Overview* and *Working with Application Expiration*.
Withdraw Application	Click the **Withdraw Application** button to change the application to a withdrawn status. When you withdraw an application, any scheduled inspections or plan reviews are canceled. For more information about withdrawing an application, see *Withdrawing an Application*.
Print Permit	Click to view the permit in PDF format in a separate browser tab. **Note:** This button appears only for permits with the Inspection status. Additionally, your browser's pop-up blocker must allow pop-up windows from the environment domain to generate the PDF of the permit.

4. Review information about the selected permit in the sections and navigate to more details:

Page Element	Description
Applicant	View the applicant's name and contact information.

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Page Element	Description
	Click the **View Details** link to open the Contacts page, where you can add additional contacts.
Workflow	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. Click the **View Details** link to open the Workflow page.
Inspections	View the number of scheduled, upcoming, and completed inspections, as well as the number of inspections that have passed and failed. Click the **View Details** link to open the Inspection List page.
Fees and Payments	View the total fees paid, amount due, and the date and amount of the last payment. Click the **View Details** link to open the Fees and Payments page.
Projects	View the projects to which this permit belongs. 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. The Projects section is available only when the permit is associated with a project.

Note: If you're using a phone, you can review a summary and access details for fees and payments, and projects, from the Overview page. For complete details, access permit applications using a laptop or desktop computer.

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

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- 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.
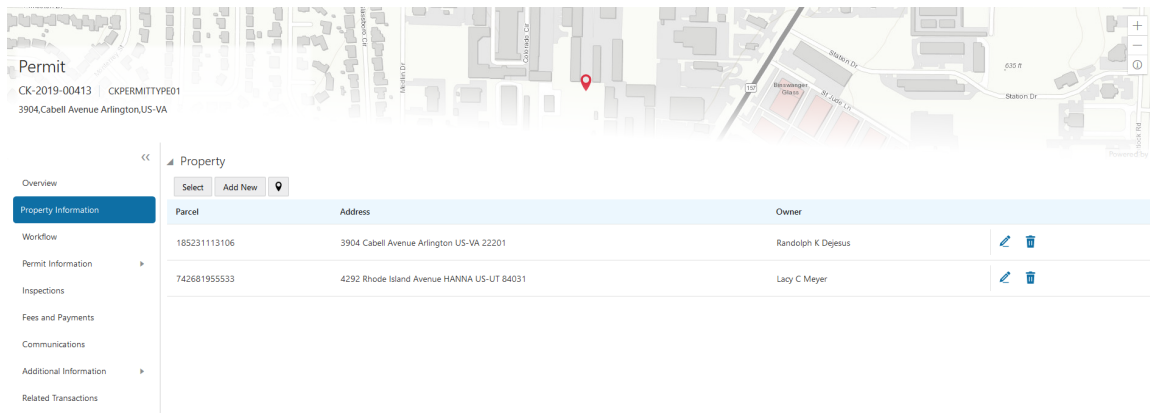
To withdraw an application:

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 Property Information

Property information shows property data from the permit or planning application. You can add, modify, and delete parcels, 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.

This example shows the Property Information page.

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Viewing Property Information

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. Click Property Information in the left panel.

   The Property Information page displays a list of properties associated with the application.
4. Click a row to view detailed parcel, address, and owner information for the property on the Property Information modal page.

Adding New Properties

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. Click Property Information in the left panel.
4. Click **Add New**.
5. Enter parcel, address, and owner information on the Property Information modal page.

   > ✎ **Note:** You can enter only address information and leave the parcel and owner information blank. Likewise, you can enter only parcel information, or only parcel and owner information, and leave the address information blank. You cannot enter owner information without first selecting a parcel.

> ✎ **Note:** By default, the first property that you add is designated as the primary parcel, address, and owner for the application.

Adding Existing Properties

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. Click Property Information in the left panel.
4. Click the **Search Property** icon.
5. On the Map View modal page, search for the property that you want to add and click it.
6. On the Search Property modal page, select the check box next to each parcel of the property that you want to add.
7. Click **Add Selected**.

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Note: By default, the first property that you add is designated as the primary parcel, address, and owner for the application.

Adding a Parcel from the Map View

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. Click Property Information in the left panel.
4. Click the **Search Property** icon.
5. Use map tools such as searching or zooming to locate the parcel on the map.
6. 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.
7. Select the check box for the parcel.
8. Click **Add Selected**.

Note: By default, the first property that you add is designated as the primary parcel, address, and owner for the application.

Modifying Property 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. Click Property Information in the left panel.
4. Click the **Edit** button next to the property that you want to modify.
5. Update parcel, address, and owner information on the Property Information modal page.
6. Click **Save**.

Deleting a Property

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. Click Property Information in the left panel.
4. On the Property Information page, click the **Delete** button next to the property you want to remove from the application.
5. Click **OK** to confirm the deletion.

Note: Deleting a property automatically deletes any associated property conditions that are applied to the permit or planning application you are working with.

Viewing Permit Application Details

You review information captured during the application intake that is specific to the permit type in the application details. Some agency staff can update the permit details captured from the application.

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When an agency designs the application form for a specific type of permit, they use elements that capture the information necessary for evaluating adherence to permit requirements. For example, for a solar permit, an applicant would enter data about the job (type of work, job cost, and so on) and solar details (type of roof, roof area, number of solar panels, and so on). These application details are reflected on the application details page for the permit.

Permit Application Details	Description
Construction Information	Captures Information regarding the current construction site and the proposed construction project.
Demolition	Captures information related to the scope of the demolition and if hazardous materials or utilities need to be considered—such as electricity, gas, water, and so on—when demolition is required as part of the job.
Electrical Equipment	Describes electrical features, such as outlet types, amps, voltage, and electric appliances.
Fence Information	Describes the proposed fence attributes, such as type, material, dimensions, location, and so on.
Grading Information	Describes the scope of grading work, such as the acreage affected, materials to be used and the amount of material.
Insurance	Provides a contractor's insurance type and policy information.
License Qualification	Enables a contractor to add any state licences they have.
Mechanical Equipment	Describes features of the job site related to ventilation, heating, cooling, fire safety, and so on.
Photovoltaic Information	Describes attributes of a site's solar energy configuration, such as roof area, coverage area, inverter information, and so on.
Plumbing Equipment	Describes attributes of a site's plumbing configuration.
Pool Information	Describes attributes of a pool, such as type, depth, location, surrounding fencing, and so on.
Property Information	Describes the parcel as it is registered with the municipality, such as the parcel ID, parcel type, and so on.
Regulated Business Activity	Enables you to specify any regulated activity or controlled substances allowed on the premises, such as alcohol, carnival rides, casino games, and so on.
Right of Way Use	Enables you to provide any details related to the use of a right-of-way on the property or to gain access to the property, such as traffic, parking, or pedestrian impact.
Roof Information	Describes features of a structure's roof, such as existing roof type, proposed roof type, number of layers, and so on.
Site and Zoning	Describes features of the property related to acreage, flood preparedness, as well as zoning and land usage information.

Permit Application Details	Description
Special Event	Enables applicants to specify information about an event, including the safety plan, concessions, facilities, potential impacts, and traffic plans.
Yard Sale	Enables applicants to specify yard sale information, such as the start time, end time, and the number of days.

Updating Permit Application Details

The fields available to update depend on the permit details on the application form.

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit.
3. Click **Permit Information** to expand the section in the left navigation panel.
4. Click **Application Details**.
5. On the Application Details page, click the **Edit** button.
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*.

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Managing Workflow Tasks

Use the Workflow page to see past and current workflow tasks and to manage task assignments, status, priority, and comments.

Access the Workflow page by clicking the Workflow tab.

This example illustrates the Workflow page in two-panel view, which is described in the following text.
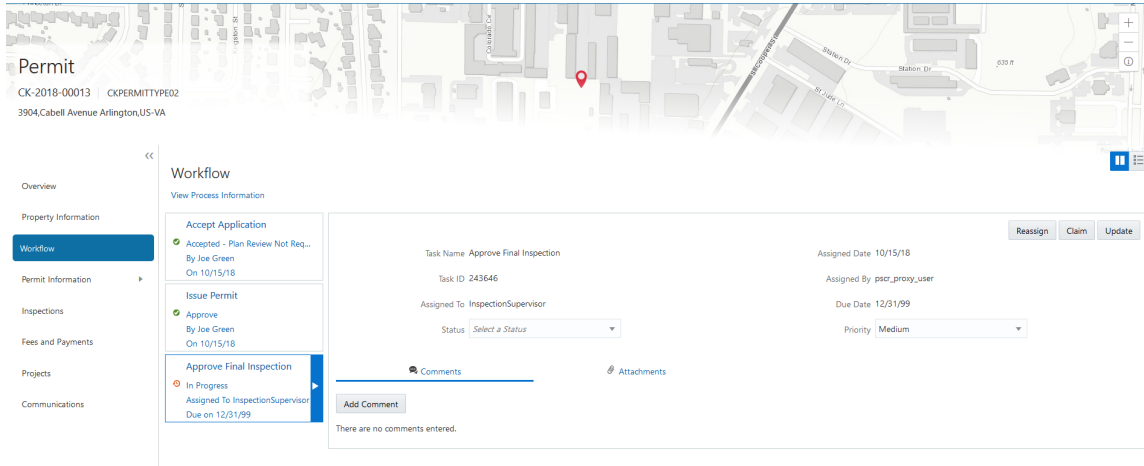
> **Note:** You can update or assign a task only if it is in progress. You can add comments to tasks that are complete, but you cannot make other changes. You cannot make any changes to a task that is not started.

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.	The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information:
	o Task name
	o Task status
	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.
	o Assignee
	Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task.

Panel	Description
	o 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.	The right panel displays more details for the task that is selected in the left panel. If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments. Completed tasks are not updatable, but you can add comments to them.

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

These fields can't be updated 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.
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.

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Page Element	Description
	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 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 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:

   ○ The **Task Name** and **Status.**

   ○ The **Last Updated Date.**

   ○ 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.

   ○ **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, user error, and so on

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:

   ○ **New Workflow Activity Name:** Select the desired workflow step.

   ○ **Update Transaction Status:** Select the proper status for the workflow step.

   ○ **Comments:** It is recommended to note who made the change and describe the circumstances requiring the manual intervention.

> ✎ **Note:** Click **View Workflow,** if you need to review the steps and swimlanes in the underlying workflow process diagram as defined in OIC. This displays an image of the entire workflow process diagram you can view.

6. Click **Save.**

> ✎ **Note:** If the alter request is not successful, supervisors have the option to retry the alter request and try again.

A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- Do not depend on each other to be completed.

- Can be completed simultaneously.

In the case of parallel tasks, the Alter Workflow tab displays each applicable parallel task for you to alter the workflow status accordingly for each.

For example, if a workflow process for a given transaction, requires a Plan Approval and a Structural Approval to occur in parallel, then the Alter Workflow tab will display those two tasks together.

This example illustrates a workflow process definition with parallel tasks.
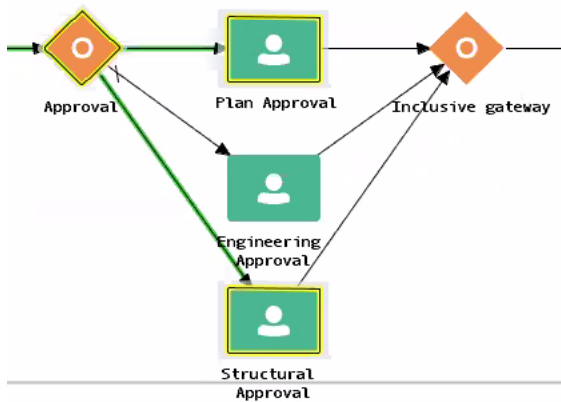
This example illustrates the Alter Workflow tab displaying parallel tasks.

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Alter Workflow ✕

◢ Plan Approval

New Workflow Activity Name Plan Approval ▼

◢ Structural Approval

New Workflow Activity Name Structural Approval ▼

Update Transaction Status Submitted ▼

Comments [   ]

View Workflow   Save   Cancel

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 transactions your agency is processing. For example, tasks can be associated with:

- permit lifecycle
- inspections
- plan reviews
- 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-	Claim Reassign

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Task Tab	Description	Available Actions
	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.	
All Workflow	Lists all tasks assigned to groups to which you belong, including tasks that are assigned to you and to other group members.	Claim 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:
	
	   o Inspection
	
	   o Plan Review
	
	   o Workflow
	
	      The Workflow task type represents overall transaction workflow.

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	Displays a task name and identifier that depend on the task type:
	
	   o For workflow tasks, the workflow process name and task ID appear. The task ID is for the specific instance of the task.
	   o For inspection tasks, the inspection name and ID appear.
	
	   o 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.

Page Element	Description
Assignment	Displays the date that the task assignment was last updated and to whom the task is assigned.
>	Click to access details for the transaction 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.

5. 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. Once a task is claimed, it appears under the tab you find your tasks, such as My Workflow.
   - **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 you can select a new assignee.

Reassigning a Workflow Task

To assign a task to someone else, 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:

1. On the agency springboard, click the **My Workflow** tile.
2. 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.
3. 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.

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.

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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.

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  o 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.
Severity 🔒 Lock	Displays the level of severity as defined while setting up the condition: At the most severe level, the Lock condition suspends all operations, including workflow advancing, payment processing, inspection scheduling, and inspection results.
Severity ⏸ Hold	Agency staff can select which rules to apply to conditions with this level of severity.
Severity ◓ Notice	This level functions as an alert and has no effect on operations.
Business Rules	Select one or more business rules. Options are: ○ Prevent New (applicable to a parcel) ○ Prevent Workflow Advancing ○ Prevent Issue or Final ○ Restrict Payment ○ Prevent Inspection Schedule ○ Prevent Inspection Result **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. For more details on the business rules, see *Setting Up Conditions*.
Additional Information	Enter additional information regarding the condition applied to the transaction.
Display Message	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.

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Page Element	Description
Priority	Select a priority from options High, Medium, and Low.
Description	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.
Applied By	Displays in view mode, the name of the user who applied the condition, or as **System** if the condition is inherited.
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 a 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 initially.

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:

   ○ Applied By

   ○ Resolution Action

   ○ Resolved By

   ○ Resolved Date

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

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Working with Attachments

You view a list of files and upload or download documents associated with a transaction, case, or incident on the Attachments page.

Attachments provide supporting documentation needed by agency staff when processing transactions.

Viewing Attachments

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

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.

   Other than the worklist, cases can also be accessed from the case list and incidents can be accessed from the incident list on the Agency Springboard.

2. Access the detail page for the transaction, case, or incident you are working with.

3. Click the **Attachments** link in the left panel to view the Attachments page.

4. On the Attachment page, view the list of attachments.

   For permits, the attachments are displayed on two tabs. The Permits tab displays attachments added through the Attachments page. The All tab displays attachments added from all sources including the Attachments page, the Workflow page, and Oracle Inspector.

Page Element	Description

File Name	View the following information in the **Filename** field:
	
	  ○ Icon indicating the file type
	
	  ○ Filename with file type extension
	
	  ○ File Size

Description	View the description of the attachment as entered by the person who added the attachment.

Source	View the source of the attached file. Valid values are:
	
	  ○ Permits
	
	  ○ Inspection
	
	  ○ Workflow
	
	  ○ Plan Reviews
	
	      Attachments that are added to a electronic plan reviews have their source changed from Permits to Plan Reviews.
	For example, attachments added through Oracle Inspector display Inspection in this field.

Page Element	Description
	Note: ✏ This column appears only on the All tab for permits.
Uploaded By	View the name of the person who uploaded the file along with the date and time that the person uploaded the file.
Category	View the document category for the attachment. The category is available when a document group is specified during setup for the transaction type. **Note:** ✏ This field in not available for case and incident attachments.
Actions	Click the actions icon to select and perform an action: ○ View Details ○ Download ○ Delete **Note:** ✏ For permits, the Delete action appears only on the Permits tab. Additionally, the security associated with your user ID may limit which actions are available to you.

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

Adding Attachments

You upload files to the Attachments page using the Add Attachments page. For permits, you use the Permits tab of the Attachments page.

✏ **Note:** You add attachments in the two-panel view of the Workflow page for permits. Inspectors can also add documents in Oracle Inspector. For permits, attachments from these sources appear on the All tab of the Attachments page. For more information see *Using Workflow* and *Oracle Inspector Overview for Permits*.

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.

> Other than the worklist, cases can also be accessed from the case list and incidents can be accessed from the incident list on the Agency Springboard.

2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
4. Click the **Add** icon.

> **Note:** For permits, this icon appears only on the Permits tab.

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. You can also select a document category and subcategory, based on the document group defined for the transaction type. If a document group was not specified during setup for the transaction type, the category and subcategory are not available.

    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*.

> **Note:** Once a permit is saved where the permit type has a document group defined, that document group is in effect for the life of the permit.

> **Note:** Document category and subcategory are not applicable to case and incident attachments.

7. Click the **Upload** button.

Viewing Attachment Details

You view document details on the Attachments details page.

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
4. In the attachments grid, click the **Action** icon for the document that you want to view.
5. 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 Attachments

You download an attachment on the Attachments page.

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
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 Attachments

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

> **Note:** For permits, you can delete attachments only from the Permits tab of the Attachments page. Additionally, the security associated with your user ID determines whether you can delete attachments.

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
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, go to the Attachments page, and select Delete in the **Action** menu for the document you want to delete.

Working with Comments

This topic discusses how to use comments. You can view, edit, and add comments on the Comments page for a transaction, case, or incident.

Adding Comments

You view, edit, and add new comments on the Comments page. Three categories of comments are available for use:

- Favorite comments: Mark comments you use regularly as your favorite and access them easily on the Favorite comments tab

- Standard comments: Select and post a comment from a list of pre-defined comments on the Standard comments tab.

- Recent comments: Select and post comments from a list of recently posted comments on the Recent comments tab.

Viewing and Editing Comments

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.

   Other than worklist, cases can also be accessed from case list and incidents can be accessed from incident list on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Comments** link in the left panel to view the Comments page.

   You can view the list of comments and select a specific comment row to view the comment details.
4. To view the details of a comment entered earlier, click the specific comment row.

   You can edit, delete, or hide the comment from public view only if it was entered by you.
5. Click **Save** after making changes to the comment.

Adding a New Comment

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.

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Other than worklist, cases can also be accessed from case list and incidents can be accessed from incident list on the Agency Springboard.

2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Comments** link in the left panel to view the Comments page.
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* 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 post a comment that is already available in the system. On the Add Comment page, click the **Select Comments** button to view the three categories of comments:
   - o Favorite: Comments that you have marked as favorite.
   - o Standard: All the predefined comments available.
   - o Recent: Comments that were recently posted.
2. Select a comment 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 administrator 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're 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 surrounding text.

Fees and Payments

Total Fees	7,537.00 USD	
Total Payable	7,537.00 USD	
Total Paid	7,537.00 USD	
Balance Due	0.00 USD	

Fee Description	Amount	Currency	Status	Department	Assessed Date	Payment Date	Payment Reference	Invoice	
Application Fee	7,537.00	USD	Paid	1001	10/27/19	10/27/19	CD_20191027T164856399Z352842	ZPERINV-2019-0000000061	>

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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 as defined when creating a fee item.
Amount	The amount due for each fee.
Currency	The currency in which the transaction is paid.
Status	- Canceled: Indicates the fee payment is no longer required. - Pending: Indicates the fee is pending the agency's finalization. The fee may or may not become due. - 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	The amount of fees that are designated as payable. 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.

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Page Element	Description
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.

Adding an Ad Hoc Fee

Using the Fees and Payments page, you can manually add ad hoc 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:

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 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 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.

Adjusting Fees

Agency staff can adjust fees as needed when there is a fee change after the application was submitted. For example, if you're adding 6 solar panels instead of 2, the required permit fees might increase. After you update the permit application, you can automatically recalculate the total fees due.

To recalculate fees, click **Recalculate** on the Fees and Payments page.

The fee difference or new fee appears as a separate line in the list of fees. The fee totals for the application are also updated. If no adjustment fees are required, the displayed fees remain the same.

> ✎ **Note:** Fees are also recalculated when you click the **Pay** button on the application detail or Transaction List pages. The applicant will see the adjusted fees in their Payment Cart.

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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.
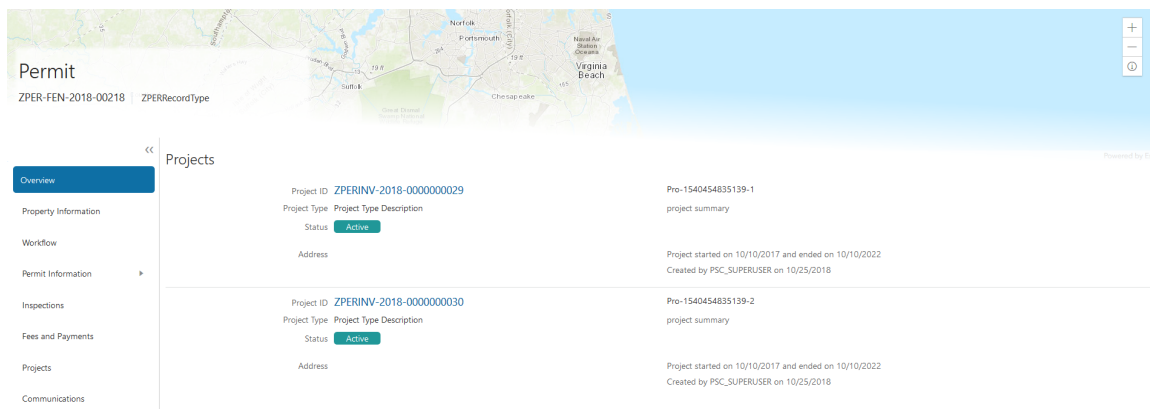
Viewing the Project Summary

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.

   > **Note:** The **Projects** tab is available only when the permit is associated with a project.

4. On the Projects page, you see a summary of the project that was created by the agency staff on a master projects page.

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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.

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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	Specify what type of ad hoc message you want to send. Values are: ○ Email: Generates an email that is sent to users. ○ Emails and Notifications: Generates both an email and a notification with the same message. ○ Notification: Generates a notification that appears when users click the notification icon in the application. ○ Text: Generates a short message service (SMS) text message that is sent to users. **Note:** The fields that are available to define on this page vary depending on the channel type that you select.
Visibility	Select which type of user can see this message. Values are: ○ Account owner ○ Agency staff only
MIME Type (Multipurpose Internet Mail Extensions type)	Select the format of the message. Values are: ○ HTML ○ Text **Note:** This field does not appear for the Text channel type.
Priority	Turn this switch on to display the notification at the top of the notification list. **Note:** This field appears only for the Emails and Notifications and Notification channel types.

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Page Elements	Definition
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists. **Note:** This field appears only for the Emails and Notifications and Notification channel types.
Select and **Insert**	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. 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.

Create Web Form	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:
	
	    o Date
	    o Text
	    o Number
	
	 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.

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	Enter the email address, user ID, or phone number of the person or organization who is sending the generated message. For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service. **Note:**

Page Elements	Definition
	Note: Enter email addresses for the Email and Emails and Notifications channel types, user IDs for the Alert, Emails and Notifications, and Notification channel types, and phone numbers for the Text channel type.
To	Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message. **Note:** Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.
Cc and **Bcc**	Enter the email addresses of the people or organizations that you want to receive a copy of the message. **Note:** These fields appear only for the Emailand Emails and Notifications channel types.
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 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 page displays all of the messages that are associated with the application.

You can view the message reference ID, date and time the message was sent, message subject, channel type, and status, such as Sent.

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

   ○ 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.

   ○ 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 all anonymous, all registered users, or individual users. Emails are messages sent to recipients 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 user mobile numbers over a cellular network or through an internet connection.

The Communications Center lists all of the emails and notifications that have been triggered from the system. This includes communications triggered as part of an event or action that a user or agency staff is performing, or that the agency staff is sending to the user. In-application communications associated with a particular permit or application also appear in the Communications Center.

> **Note:** Agency staff can also create application-specific ad hoc emails, notifications, and texts on the Communication Details page in the transaction detail pages. You access the transaction through Transactions page, where you select a specific permit or planning application and select the Communications tab in the left-panel navigation. For more information, see *Working with Application Communications*.

Alert setup using the either the delivered PSC_GENERIC_ALERT event or the delivered ADHOC-EVENT event is also available. For step-by-step instructions for setting up alerts using the delivered events, see *Defining Alerts*.

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:

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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	Enter a value for the target recipients of the alert: ○ Individual Registered Users Enter comma-separated user IDs for the registered users, for example, `SYSTEM_ADMIN,BUSINESS_ANALYST`. ○ All Registered Users Enter this attribute: `${User}`. The application displays the alert when the registered user logs in. ○ All Anonymous Users Enter this attribute: `${Anonymous}`. ○ A Combination of Users Enter a string including comma-separated user IDs for the registered users, `${User}` for all registered users, and `${Anonymous}` for all anonymous users.
Message Body	Enter the main body of the alert using plain, unformatted text.
Select and Insert	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. 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.
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.
4. Click **Save**.

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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 Emails, Notifications, 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	Specify what type of ad hoc message you want to send. Values are: ○ Email: Generates an email that is sent to users. ○ Emails and Notifications: Generates both an email and a notification with the same message. ○ Notification: Generates a notification that appears when users click the **Notifications** button in the header at the top of the page in the application. ○ Text: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service. **Note:** The fields that are available to define on this page vary depending on the channel type that you select.
Visibility	Select which type of user can see this message. Values are: ○ Account owner ○ Agency staff only
MIME Type (Multipurpose Internet Mail Extensions type)	Select the format of the message. Values are: ○ HTML ○ Text **Note:** This field does not appear for the Text channel type.
Priority	Turn this switch on to display the notification at the top of the notification list.

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Page Elements	Definition
	Note: This field appears only for the Emails and Notifications and Notification channel types.
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists. **Note:** This field appears only for the Emails and Notifications and Notification channel types.
Reference	Enter a unique alphanumeric reference for the communication.
Select and **Insert**	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. 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.
From	Enter the email address, user ID, or phone number of the person or organization who is sending the generated message. For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service. **Note:** Enter email addresses in the **Email Attributes** section for the Email and Emails and Notifications channel types; user IDs in the **Notification Attributes** section for the Alert, Emails and Notifications, and Notification channel types; and phone numbers in the **Compose** section for the Text channel type.
To	Enter a value for the target recipients of the message. For notifications, enter comma-separated user IDs for the registered users, for example, `SYSTEM_ADMIN,BUSINESS_ANALYST`. For emails, enter comma-separated email addresses for the recipients, for example, `john.doe@example.com`.

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Page Elements	Definition
Cc and **Bcc**	Enter the email addresses of the people or organizations that you want to receive a copy or a blind copy of the message. **Note:** These fields appear only for the Emailand Emails and Notifications channel types.
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:
   - 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.
   - 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.

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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.
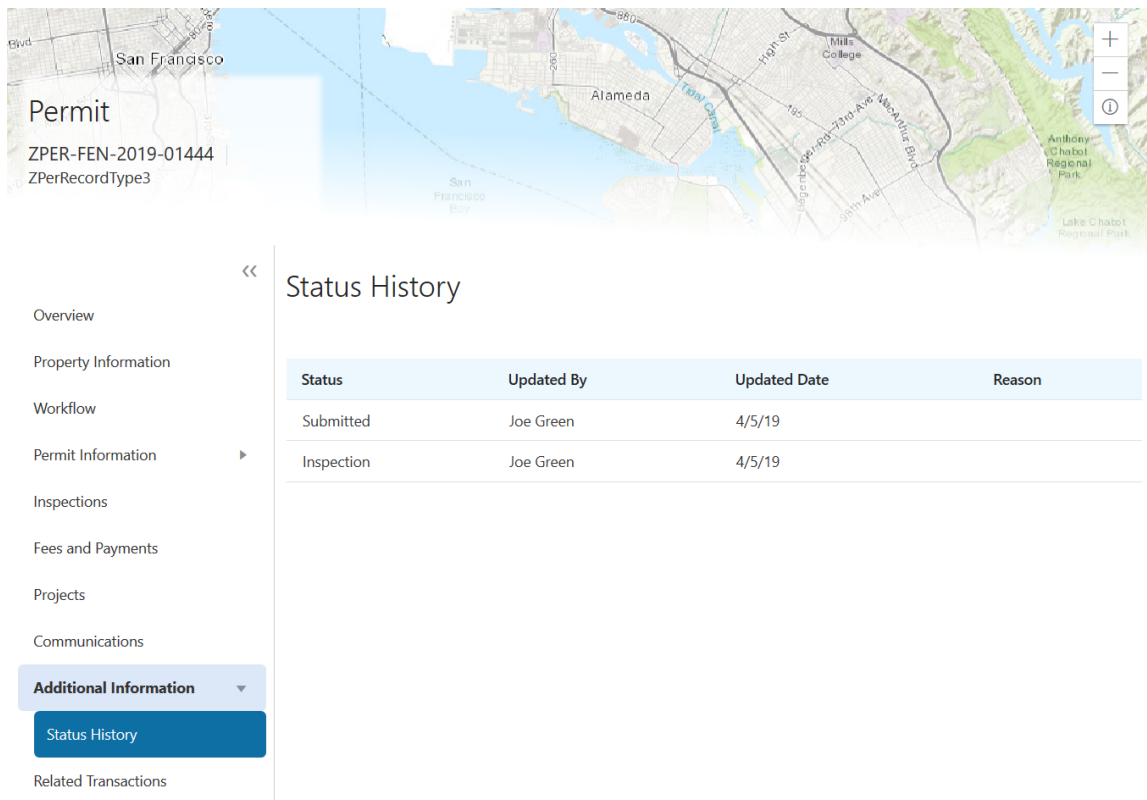
Reviewing the Status History

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.

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Page Element	Description
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 open the Link Transaction page, which lists the applications you can link – along with the status and description of the transaction.
5. Select all the desired applications using the check box and click the **Add Selected** button to establish a link between the transaction applications.

   The Related Transactions page for each of the newly linked transaction now lists the new transaction row with a link to access the linked related transaction 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 **Delete** icon on the related transaction row you want to delete. The Related Transactions page refreshes to list the remaining related transaction rows.

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3 Working with Application Expiration

Application Expiration Overview

You can view the basics about how application expiration works, including application rules, when rules are applied to the different types of permit and planning applications, and expiration status processing.

Application Rules Overview

Your agency defines expiration rules that determine the expiration dates for an application. The application expirations apply to different phases of the application. The rules include grace periods, which provide extra time beyond the expiration date for the user to take action. The rules also include extensions, which provide a way for you to add time to the expiration timeframe. The only exception is pending inactive applications, which cannot be extended.

For information about expiration rules, see *Setting Up Permit Expiration Rules* and *Setting Up Planning Application Expiration Rules*.

Permit Expiration Dates Overview

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

  The expiration timeframe begins when the user saves an application and ends with application submission.

- When the application expires.

  The expiration timeframe begins when the agency accepts an application and ends when the permit is issued.

  > ⚠️ **CAUTION:** When an application expires, all plan review tasks associated with the application are canceled.

- When the permit expires.

  The expiration timeframe begins when the agency issues the permit and ends when the Certificate of Occupancy is issued or the permit is completed.

  > ⚠️ **CAUTION:** When a permit expires, all inspection tasks associated with the application are canceled.

For example, the rules for a permit application may be set up as follows: Require users to submit an application they started within 30 days. Then after the application has been accepted, they have another 45 days to complete requirements and get the issued permit. Once the permit is issued, the applicants must complete the all tasks including the final inspection within 180 days. The rules may provide for a grace period and one or more extensions to allow for more time.

Planning Application Expiration Dates Overview

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

  The expiration timeframe begins when the user starts an application and ends with application submission.

- When the entitlement expires.

  The expiration timeframe begins when the agency issues the completed entitlement and ends when the user submits the permit application.

This example applies specifically to planning applications: After the user submits the planning application and the agency issues an entitlement, the user must submit a permit application within 90 days. There is a grace period of 5 days, so the applicant has a total of 95 days to submit the application before the entitlement expires. The rules may provide one or more extensions to allow for more time.

The expiration rule for pre-applications defines when the pre-application expires.

Pre-Application Expiration Date Overview

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.

  The expiration timeframe begins when the user starts an application and ends with application submission.

- When the pre-application expires.

  The expiration timeframe begins when the user completes the pre-application and ends when the user starts the planning application.

An example for pre-application expiration might be like this: The applicant submits the pre-application within 30 days as specified in the expiration rules. Then the applicant completes the tasks such as meetings and required applications. Then the applicant has 120 days from the time the pre-application is complete until they submit the planning application. There may be a grace period and extensions for pre-application expiration dates.

Processing Expiration Status Overview

You can view the latest expiration statuses in the permit or planning application details, or in the list of transactions. To change the status to Expired, your agency must first run an expiration process. Processing runs against applications with application types for which an expiration rule was defined.

Here's an example of how the processing works: An agency created a rule for solar permits that indicates pending applications expire in 30 days. The period of time when a notification appears for applications about to expire is 5 days. In this case, the system updates the expiration dates for pending solar permit applications to indicate when the application is about to expire and when it expired. That is, when the pending application is inactive for 25 days, the application is about to expire, and at 30 days, the application expires. If the rule includes a grace period, such as 3 days, the system status changes to expired after 33 days of inactivity.

When the application expires, processing changes the system status to Expired and cancels all associated open tasks.

For information about how to process expiration statuses, see *Updating Application Expiration Status*.

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Working with Application Expiration

You can view and extend expiration dates for different types of permit and planning applications that are determined by rules set up by your agency.

You view the expiration dates on the list of transactions with permit and planning application information as well as on the individual application's overview page.

Viewing the Expiration Dates

To view the expiration dates:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. On the Transactions page, you see the agency view of the applications list. Click **Sort By** and select Expiration Date to view the applications with expiration dates. You can also use **Filter By** to filter the results based on expiration date.

   Here's an example of what you would see on the Transactions page: If the expiration rule is set up to show that the permit application is about to expire 5 days in advance, the expiration date displays Expires on <date> starting 5 days before the application expires. When the application expires, the application row displays Expired on <date>.
3. To view the expiration on the application's Overview page, click the row for the application on the Transactions page.

Extending Expiration Dates

Depending on the rules created for an application type, you can extend the deadlines for an application. When one or more extensions are possible, the **Extend** link is available for you to enter a new expiration date. The link appears during the period when the application is about to expire and also during the grace period.

> ✏️ **Note:** With the exception of inactive pending applications, you can extend the expiration dates for applications as defined in the rules setup.

Related Topics
- Application Expiration Overview

Updating Application Expiration Status

You update the application expiration status using a process that runs against predefined rules.

You run the process that updates permit and planning application expiration status on the Process Expiration Rules page, which you access by selecting **Common** > **Process Expiration Rules** .

Processing runs against applications with application types for which an expiration rule was defined.

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Here's an example of how the processing works: An agency created a rule for solar permits that indicates application expires in 30 days. The period of time when a notification appears for applications about to expire is 5 days. During processing, the system updates the status to Expired when the application expires. That is, when the permit is not issued within 25 days, the application is about to expire, and at 30 days, the application expires. If the rule includes a grace period, such as 3 days, the system status changes to Expired after 30 days, but resets if there is activity within the 3-day grace period.

When the application or permit expires, processing changes the system status to Expired and cancels all associated open tasks.

Entering Parameters to Process Expiration Rules

1. Access the Parameters tab on the Process Expiration Rules page.
2. Select the **Classification** for which you are updating expiration dates: Planning and Zoning or Permits.

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: ○ 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. **Note:** Daily is the recommended option for running the expiration status update process. ○ 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**	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.

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Page Element	Description
	Note: These fields are available only if you select a process frequency of Hours or Minutes.
Days	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. **Note:** This field is available only if you select a process frequency of Daily.
Weeks	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. **Note:** This field is available only if you select a process frequency of Weekly.
Repeat – By day	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. 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. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Repeat – 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.

Page Element	Description
	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:

   - On success

   - On error

   - 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.

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4 Reviewing Permit Plans Manually

Manual Plan Review Process Flow

Building projects require a permit plan review to evaluate the projects before permits are issued.

Manual plan reviews are tracked as part of permitting workflow, but are performed without the use of integrated electronic document review software. Manual plan reviews are created for permits when the **Plan Review Type** is set to Manual for the associated permit type. For more information see *Setting Up Permit Types*.

> ✏️ **Note:** Electronic plan reviews are performed through integration with electronic document review software. For more information on electronic plan reviews, see *Managing Electronic Plan Review Cycles*.

The process flow for a manual plan review includes the following steps:

1. A registered public user submits a permit application with attached documents that require review by agency staff.
2. A permit technician accepts the permit application with a status that requires a plan review. For more information, see *Using Workflow*.
3. The plan coordinator adds a plan review cycle for the permit. See *Managing Manual Plan Review Cycles*.
4. The plan coordinator assigns reviewers to the plan review cycle. See *Managing Manual Plan Review Cycles*.
5. The assigned plan reviewers complete their review. See *Performing Manual Plan Reviews*.
6. Repeat steps 3 through 5 for additional plan review cycles as necessary until the review is complete.

Managing Manual Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a building plan review completed by multiple reviewers who work with plan reviews for different types of permits.

As a plan coordinator, you perform these review cycle tasks on the Plan Reviews page in the permit details component:

- Add plan review cycles.
- Cancel plan review cycles.
- Add and remove plan reviewers.
- View the different plan review cycles.
- Add comments for a review cycle.
- View all plan review comments.

This example shows the Plan Reviews page for a manual review.

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Plan Reviews

View Plan Comments

Add Review Cycle   Cancel Review Cycle

Details

Review Name BVPermitType	Review Cycle 2	Switch Cycle
Review Status In Progress	Cycle Days 0	
Open Date 10/7/19 11:23 PM	Decision	
Opened By Joe Green	Decision Date	

Reviewers

	Add Reviewer					Reviewer	
Department	**Reviewer**	**Status**	**Decision**	**Decision Date**	**Override**		
RevFire	Jonathan Powers	In Progress			No	🗑	›

Comments

There are no comments entered.

Add Comment

> **Tip:** You can access this page on a mobile device as well as on a laptop or desktop computer. On a mobile device, this page enables you to view plan review status and comments. It does not enable you to add or edit plan review information.

Manual Plan Review Cycle Workflow

The plan review workflow for the plan coordinator appears on the Task Management page. As a plan coordinator, you sort tasks by Workflow.

When the last reviewer provides a decision status for a plan review cycle, it is automatically closed. Upon closing, the overall review status changes to Complete.

The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: Rejected, Revision Required, Approved with Comments, Approved, and Not Required. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

If you configured a template for the delivered Plan Review Completed or Canceled communication event, the completion or cancelation of the review cycle triggers the generation of a communication to the designated users. For example, the completion of a review cycle can send a notification to the plan coordinator. For more information on communication event templates, see *Setting Up Communication Events*.

Workflow is automatically moved forward to the next step when the current plan review cycle status is Complete and the plan review decision is Approved, Approved with Comments, or Not Required. The workflow process definition needs to identify the plan review task and the action to take when auto-advancing. For more information, see *Using Custom Properties*.

Once a plan review cycle or permit is closed or canceled, you can no longer edit comments.

Adding Manual Plan Review Cycles

Before assigning reviewers, you add plan review cycles for a permit on the Plan Reviews page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Add Review Cycle** button to add a new plan review cycle.

   This button is available only when:

- You're adding the first plan review cycle for a permit.

- All other plan review cycles for the permit are complete or canceled.

5. For the initial plan review cycle, the default review cycle name is the Permit Type value, but you can enter a different cycle name on the Add Review Cycle page.

6. If you are resubmitting a plan review, select the check box on the Add Review Cycle page to copy the reviewers from the most recent review cycle.

7. Click the **Add** button.

The cycle must be canceled or complete before you can add another new plan review cycle. That is, you can have only one active plan review cycle at a time. The number of review cycles is shown in the Plan Reviews page header details, and you can switch between multiple cycles to view reviewer and decision details.

Canceling Manual Plan Review Cycles

You cancel a plan review cycle for a permit on the Plan Reviews page.

Canceling a cycle sets the review cycle status to Canceled. After canceling, the cycle and review details are read-only. All active tasks associated with the plan review are canceled when the plan review cycle is canceled.

> **Note:** An active plan review cycle is canceled when the permit application that it is associated with is withdrawn.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Cancel Review Cycle** button to cancel a plan review cycle that is active.

   This button is available only when the plan review cycle has a status of In Progress.

Adding Reviewers to Manual Plan Reviews

After creating a plan review cycle, you add plan reviewers on the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Reviewers** field, and select from the available reviewers, which are listed by plan reviewer department. For more information on plan reviewer departments, see *Setting Up Plan Reviewer Departments*.

   > **Note:** Reviewers are available in the list only when they have a permit type job attribute that matches the permit type of the permit. For more information on assigning job attributes, see *Managing Agency Staff Profiles*.

5. Click the **Add Reviewer** button.

   This button is available only when the review cycle is active.

   When the Reviewers grid refreshes, you'll see the reviewer with an In Progress status.
6. Repeat steps 4 and 5 to add more reviewers.

> **Note:** If you're resubmitting a plan for review, you can elect to copy the original set of reviewers when you add a new plan review cycle. See *Managing Manual Plan Review Cycles*.

Removing Reviewers from Manual Plan Reviews

As a plan coordinator, you can remove or delete plan reviewers from a plan review cycle on the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Review** .
4. In the Reviewers grid, click the **Delete** button for a reviewer.

   You can remove reviewers when:

   - The plan review cycle is active.
   - The reviewer's status is In Progress.
   - You entered an override decision for a reviewer, but the reviewer did not enter comments or a decision before the override.

   You cannot delete a reviewer if the reviewer has added comments or entered a decision.

> **Note:** Removing the last plan reviewer who hasn't yet submitted a decision permanently closes the plan review cycle. If desired, you can add a new reviewer before removing the last reviewer, or close the cycle and open a new one.

Viewing the Different Plan Review Cycles

You can switch between plan review cycles to view the **Reviewers** grid for each cycle.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Switch Cycle** link in the plan review header details.

   This link is available only when there are two or more plan review cycles.
5. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

   The refreshed page shows the cycle header details and reviewers for the selected cycle.

Adding Comments for a Review Cycle

Plan coordinators can add comments at the review cycle level on the Plan Reviews page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

   All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or permit is closed or canceled.

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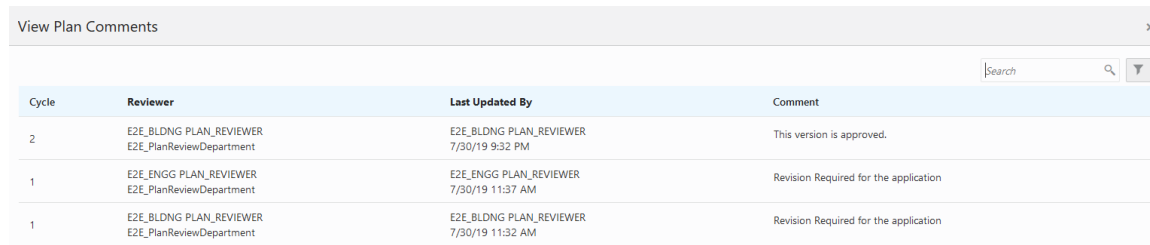
Viewing All Plan Review Comments

Plan coordinators, plan reviewers, and applicants can view all comments entered for all cycles of a plan review on the Plan Reviews page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. On the Plan Reviews page, click the **View Plan Comments** link.

   This example shows the View Plan Comments page for a manual review.

Cycle	Reviewer	Last Updated By	Comment
2	E2E_BLDNG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_BLDNG PLAN_REVIEWER 7/30/19 9:32 PM	This version is approved.
1	E2E_ENGG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_ENGG PLAN_REVIEWER 7/30/19 11:37 AM	Revision Required for the application
1	E2E_BLDNG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_BLDNG PLAN_REVIEWER 7/30/19 11:32 AM	Revision Required for the application

   The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. The comments listed on this page are searchable and filterable.

Performing Manual Plan Reviews

Plan reviewers perform reviews of building plan documents prior to permit issuance.

As a plan reviewer, you view a list of plans assigned to you on the Task Management page and provide your plan review decision on the Plan Reviewer Decision Details page.

This example shows the Plan Reviewer Decision Details page.

Plan Review Decision Details

Reviewer Details

Assigned Date 5/14/19 12:04 AM	Last Updated Date 5/14/19 12:04 AM
Assigned By Success with No User Found	Last Updated By Lola Nguyen
Review Status In Progress	

Reviewer Decision

Reviewer Jonathan Powers	Decision Approved
Decision Date	

Override Reviewer Decision

Override By	Override Decision
Override Date	

Comments

There are no comments entered.

Add Comment

Cancel   Save

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An agency's plan coordinator can also use this page to override a plan reviewer's decision.

The plan review functionality derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status.

Viewing Plan Reviews Assigned to You

As a plan reviewer, you can find the plan reviews assigned to you on the Task Management page.

1. Select **My Plan Reviews** on the Agency Springboard.
2. The Task Management page opens with a predefined filter to select tasks with the Plan Review type.

   You can also use the filter button to filter by additional parameters, including task name, permit ID, permit type, status, last updated date, or assigned by.
3. Plan review assignments appear in the task grid. Click the **View More Details** button for a permit record to open the Plan Reviews page.

> ✏️ **Note:** Both manual and electronic plan reviews that are assigned to you appear on this page. For more information on electronic plan reviews, see *Performing Electronic Plan Reviews*.

The plan review workflow tasks for plan coordinators also appear on the Task Management page. Plan coordinators sort tasks by Workflow.

Adding a Manual Plan Review Decision

As a plan reviewer, you can add your plan review decision on the Plan Reviewer Decision Details page in the permit details pages. You can modify your decision until the plan review cycle is closed or canceled, but you cannot modify your decision if the plan coordinator overrides your decision.

The system derives the overall plan review status from the individual plan reviewer decisions, and updates the overall plan review with the most severe decision status. The system-defined decision statuses are listed here from most to least severe: Rejected, Revision Required, Approved with Comments, Approved, and Not Required. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. In the **Reviewers** grid, click the **View More Details** button for your row.
5. On the Plan Reviewer Decision Details page, select a value from the **Decision** list.

   You can select from these system-defined decision statuses:

   - Approved
   - Approved with Comments
   - Revision Required
   - Rejected
   - Not Required

   The decision status names in the **Decision** list may not match the system status names, because displayed statuses can be modified by the agency. For example, if the agency changes the displayed status of Rejected,

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you might see Declined or Failed. However, the severity of the decision remains the same. Any displayed status associated with the system status Rejected, for example, is always calculated as the most severe status.

6. Click **Add Comments** to enter comments for your review.

   You can't edit comments once the plan review cycle or permit is closed or canceled.

7. Click the **Save** button.

   The system updates the **Decision Date** field with a timestamp.

> ✏️ **Note:** An agency's plan coordinator can override a plan reviewer's existing decision but can't change decisions. When a plan coordinator overrides a decision, the decision status and timestamp appears in the **Reviewers** grid in the reviewer's row.

Overriding Plan Reviewer Decisions

In some cases, the agency's plan coordinator overrides a plan reviewer's existing decision.

As a plan coordinator, you can override the individual plan reviewer's decision on the Plan Reviewer Decision Details page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. In the **Reviewers** grid, click the **View More Details** button for the selected plan reviewer.
5. On the Plan Reviewer Decision Details page, select a value from the **Override Decision** list.

   You can select from these decisions:

   - Approved
   - Approved with Comments
   - Revision Required
   - Rejected
   - Not Required

6. Click the **Save** button.

   The system updates the plan reviewer's **Decision Date** timestamp and enters Yes in the **Override** field.

> ✏️ **Note:** If the plan coordinator overrides the last review in the plan review cycle, the override action changes the status of the plan review cycle to complete.

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5 Reviewing Permit Plans Electronically

Electronic Plan Review Process Flow

Building projects require a permit plan review to evaluate the projects before permits are issued.

Electronic plan reviews are tracked as part of permitting workflow, and are performed through an integration with Bluebeam™, a collaborative electronic document review tool.

> ✏️ **Note:** To enable the Bluebeam™ integration contact Oracle Support.

Electronic plan reviews are created for permits when the **Plan Review Type** is set to Electronic for the associated permit type. For more information see *Setting Up Permit Types*.

> ✏️ **Note:** Manual plan reviews do not include document review or integration with Bluebeam™. For more information on manual plan reviews, see *Managing Manual Plan Review Cycles*.

The process flow for a electronic plan review includes the following steps:

1. A registered public user submits a permit application with attached documents that require review by agency staff.
2. A permit technician accepts the permit application with a status that requires a plan review. For more information, see *Using Workflow*.
3. The plan coordinator adds a plan review cycle for the permit, which creates a Bluebeam Studio™ Session. See *Managing Electronic Plan Review Cycles*.
4. The plan coordinator adds documents to the plan review cycle and assigns reviewers to the documents. See *Managing Electronic Plan Review Cycles*.
5. The assigned plan reviewers complete their review. See *Performing Electronic Plan Reviews*.
6. The plan coordinator finalizes the plan review cycle. See *Managing Electronic Plan Review Cycles*.
7. Repeat steps 3 through 6 for additional plan review cycles as necessary until the review is complete.

Managing Electronic Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a building plan review completed by multiple reviewers who work with plan reviews for different types of permits.

Your agency conducts electronic document reviews in Bluebeam Studio™ Sessions.

As a plan coordinator, you perform these review cycle tasks on the Plan Reviews page in the permit details component:

- Add plan review cycles.
- Cancel plan review cycles.
- Add and remove electronic documents.
- Add and remove plan reviewers.

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- View the different plan review cycles.

- Add comments for a review cycle.

- View all plan review comments.

- Finalize plan review cycles.

This example shows the Plan Reviews page for an electronic review.

> **Tip:** You can access this page on a mobile device as well as on a laptop or desktop computer. On a mobile device, this page enables you to view plan review status and comments. It does not enable you to add or edit plan review information.

Electronic Plan Review Cycle Workflow

The plan review workflow for the plan coordinator appears on the Task Management page. As a plan coordinator, you sort tasks by Workflow.

An electronic plan review cycle for a permit is automatically completed when all reviewers have provided a decision status for all of the documents added to the electronic document review session.

The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: Rejected, Revision Required, Approved with Comments, Approved, and Not Required. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

Workflow is automatically moved forward to the next step when all of the following criteria are met:

- The current plan review cycle status is Complete.

- The plan review decision is Approved, Approved with Comments, or Not Required.

- The review cycle has been finalized.

The workflow process definition needs to identify the plan review task and the action to take when auto-advancing. For more information, see *Using Custom Properties*

Once a plan review cycle or permit is completed or canceled, you can no longer edit comments.

> ✎ **Note:** Once the plan review cycle is complete, the plan coordinator finalizes the review cycle to download the reviewed electronic documents and close the Bluebeam™ Studio Session.

Electronic Plan Review Communications

The following communication events enable you to generate notifications for plan reviews.

Event Name	Communication Description
Plan Review Completed or Canceled	Generates a notification when an electronic plan review is canceled. This event is also triggered when the permit associated with a plan review expires or is withdrawn. > ✎ **Note:** > This event generates a notification when a manual review is completed or canceled. For more information on manual plan reviews, see *Managing Manual Plan Review Cycles*.
Plan Review Finalized	Generates a notification when a plan review is finalized.
Plan Review Ready To Finalize	Generates a notification when a plan review is ready to be finalized.

You must configure templates to define the content of the generated notifications and determine who receives them. For more information on configuring communication event templates, see *Setting Up Communication Events*

Adding Electronic Plan Review Cycles

Before assigning electronic documents and reviewers, you add plan review cycles for a permit on the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Add Review Cycle** button.

   This button is available only when:

   - You're adding the first plan review cycle for a permit.

   - All other plan review cycles for the permit are finalized or canceled.

5. For the initial plan review cycle, the default review cycle name is the Permit Type value, but you can enter a different cycle name on the Add Review Cycle page.
6. Click the **Add** button to add a review cycle and create a Bluebeam Studio™ Session for it. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

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> **Note:** If an error occurs while creating the Bluebeam Studio™ Session, a **Create Session** button appears next to the Add Cycle button. Click it to retry creating the Bluebeam Studio™ Session. You can't add documents or reviewers to a review cycle until you successfully create a Bluebeam Studio™ Session.

After the Studio Session is created, the **View Session** link appears on the Plan Review page.

The cycle must be canceled or finalized before you can add another new plan review cycle. That is, you can have only one active plan review cycle at a time. The number of review cycles is shown in the Plan Review page header details, and you can switch between multiple cycles to view reviewer and decision details.

Canceling Electronic Plan Review Cycles

You cancel a plan review cycle for a permit on the Plan Review page.

Canceling a cycle sets the review cycle status to Canceled. After canceling, the cycle and review details are read-only. All active tasks associated with the plan review are canceled when the plan review cycle is canceled.

> **Note:** An active plan review cycle is canceled when the permit application that it is associated with it is withdrawn.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Cancel Review Cycle** button to cancel a plan review cycle that is active.

   This button is available only when the plan review cycle has a status of In Progress.

Adding Documents to Electronic Plan Reviews

After creating a plan review cycle, you add documents on the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Add** button in the Documents grid.
5. On the Add Documents modal page, select the check box next to the documents you want to add to the review. Only documents in PDF format that are added as attachments for the permit are available to select. For more information on attachments, see *Working with Attachments*.

   > **Note:** Documents that have been added to the plan review do not appear in the Add Documents modal page.

6. Click **Save** to add the documents to the review cycle and upload them to the Bluebeam Studio™ Session. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

   When the Documents grid refreshes, you'll see the documents to be reviewed with an In Progress status. Reviewed versions of the documents from the previous cycle also appear in the grid, but they have a status of Completed.

> **Note:** If an error occurs while uploading a document to the Bluebeam Studio™ Session, a **Retry** button appears in the Documents grid. Click it to upload the documents in the grid that failed to upload when they were added.

Removing Documents from Electronic Plan Reviews

As a plan coordinator, you can remove documents from a plan review cycle on the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Review** .
4. In the Documents grid, click the **Delete** button for a document.

   You can delete documents when:

   - The plan review cycle is active.

   - The document's status is In Progress.

   - No reviewers have been added to the document.

5. Click **OK** to confirm the deletion and remove the file from the Bluebeam Studio™ Session.

Adding Reviewers to Electronic Plan Reviews

As a plan coordinator, after adding electronic documents to a plan review, you add reviewers for each document on the Reviewers page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Expand a document row to view its reviewer information.
5. Click the **Reviewers** field, and select from the available reviewers, which are listed by plan reviewer department. For more information on plan reviewer departments, see *Setting Up Plan Reviewer Departments*.

   > **Note:** Reviewers are available in the list only when they have a permit type job attribute that matches the permit type of the permit. For more information on assigning job attributes, see *Managing Agency Staff Profiles*.

6. Click the **Add Reviewer** button to add the reviewer to the document in the Bluebeam Studio™ Session. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

   When the Documents grid refreshes, you'll see the reviewer with an In Progress status.

   > **Note:** If an error occurs while uploading a document to the Bluebeam Studio™ Session, a **Retry** button appears next to the **Add Reviewer** button. Click it to add the reviewers in the grid that failed to add.

> **Note:** If you're resubmitting a document for review, the reviewers assigned to the document during the last review cycle are automatically assigned to the resubmitted document when you add it to the new plan review cycle.

Accessing a Studio Session

You can access created Studio Sessions using from the Plan Review page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **View Session** link to access the Studio Session using an external Bluebeam™ application.

Viewing the Different Plan Review Cycles

You can switch between plan review cycles to view the **Documents** grid for each cycle.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Switch Cycle** link in the plan review header details.

   This link is available only when there are two or more plan review cycles.
5. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

   The refreshed page shows the cycle header details and documents for the selected cycle.

Adding Comments for a Review Cycle

Plan coordinators can add comments at the review cycle level on the Plan Reviews page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

   All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or permit is closed or canceled.

Viewing All Plan Review Comments

Plan coordinators and plan reviewers can view all comments entered for all cycles of a plan review on the Plan Reviews page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. On the Plan Reviews page, click the **View Plan Comments** link.

   This example shows the View Plan Comments page for a manual review.

Cycle	Reviewer	Last Updated By	Comment
2	E2E_BLDNG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_BLDNG PLAN_REVIEWER 7/30/19 9:32 PM	This version is approved.
1	E2E_ENGG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_ENGG PLAN_REVIEWER 7/30/19 11:37 AM	Revision Required for the application
1	E2E_BLDNG PLAN_REVIEWER E2E_PlanReviewDepartment	E2E_BLDNG PLAN_REVIEWER 7/30/19 11:32 AM	Revision Required for the application

The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. The comments listed on this page are searchable and filterable.

Finalizing a Plan Review Cycle

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews**.
4. Click the **Finalize Review Cycle** button to finalize the plan review cycle. This process closes the Studio Session and downloads the marked up documents with CycleX appended to the file name where X is the number of the review cycle. These downloaded files are added to the list of documents for the plan review cycle and the list of attachments for the permits. Reviewers can compare these marked up document to new versions of the document in subsequent review cycles. To perform actions on these downloaded files outside of the plan review process, use the Attachments page. See *Working with Attachments*.

   If any of the documents for the review cycle have a **Decision** of Rejected or Revision Required, the Finalize Review Cycle process automatically adds a new review cycle that includes the marked up documents in the Documents grid.

   Note: The **Finalize Review Cycle** button is available only when the status is Completed for all documents added to the plan review cycle.

The Finalize Review Cycle process includes many different steps. The following table provides resolutions to errors that might occur during these steps.

Finalization Error	Resolution
Document Download	Click **Finalize Review Cycle** to retry finalizing from the point of error.
Close Session	Click **Finalize Review Cycle** to retry closing the Bluebeam Studio™ Session.
Create Cycle	Click **Add Review Cycle** to retry creating the next review cycle and Bluebeam Studio™ Session, and uploading the marked up documents from the previous review cycle.
Create Session	Click **Create Session** to retry creating the Bluebeam Studio™ Session and uploading the marked up documents from the previous review cycle.
Upload Marked Up Documents	Click **Retry** to retry uploading the marked up documents from the previous review cycle.
Unrecoverable Error	Click **Cancel Review Cycle** to cancel the review cycle.

Performing Electronic Plan Reviews

Plan reviewers perform reviews of building plan documents prior to permit issuance.

As a plan reviewer, you view a list of plans assigned to you on the Task Management page and provide your plan review decision on the Plan Reviewer Decision Details page.

This example shows the Plan Reviewer Decision Details page.

An agency's plan coordinator can also use this page to override a plan reviewer's decision.

The plan review functionality derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status.

Viewing Plan Reviews Assigned to You

As a plan reviewer, you can find the plan reviews assigned to you on the Task Management page.

1. Select **My Plan Reviews** on the Agency Springboard.
2. The Task Management page opens with a predefined filter to select tasks with the Plan Review type.

   You can also use the filter button to filter by additional parameters, including task name, permit ID, permit type, status, last updated date, or assigned by.
3. Plan review assignments appear in the task grid. Click the **View More Details** button for a permit record to open the Plan Reviews page.

> **Note:** Both manual and electronic plan reviews that are assigned to you appear on this page. For more information on manual plan reviews, see *Performing Manual Plan Reviews*.

The plan review workflow tasks for plan coordinators also appear on the Task Management page. Plan coordinators sort tasks by Workflow.

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Adding an Electronic Plan Review Decision

As a plan reviewer, you can add your plan review decision on the Plan Reviewer Decision Details page in the permit details pages. You can modify your decision until the plan review cycle is completed or canceled, but you cannot modify your decision if the plan coordinator overrides your decision.

The system derives the overall plan review status from the individual plan reviewer decisions, and updates the overall plan review with the most severe decision status. The system-defined decision statuses are listed here from most to least severe: Rejected, Revision Required, Approved with Comments, Approved, and Not Required. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. In the Documents grid, expand the row for the document you want to review.
5. Click the **View More Details** button for your row.
6. On the Plan Reviewer Decision Details page, select a value from the **Decision** list.

   You can select from these system-defined decision statuses:

   - Approved
   - Approved with Comments
   - Revision Required
   - Rejected
   - Not Required

   The decision status names in the **Decision** list may not match the system status names, because displayed statuses can be modified by the agency. For example, if the agency changes the displayed status of Rejected, you might see Declined or Failed. However, the severity of the decision remains the same. Any displayed status associated with the system status Rejected, for example, is always calculated as the most severe status.
7. Click **Add Comments** to enter comments for your review.

   You can't edit comments once the plan review cycle or permit is closed or canceled.
8. Click the **Save** button.

   The system updates the **Decision Date** field with a timestamp.

> **Note:** An agency's plan coordinator can override a plan reviewer's existing decision but can't change decisions. When a plan coordinator overrides a decision, the decision status and timestamp appears in the reviewer's row in the Documents grid.

Overriding Plan Reviewer Decisions

In some cases, the agency's plan coordinator overrides a plan reviewer's existing decision.

As a plan coordinator, you can override the individual plan reviewer's decision on the Plan Reviewer Decision Details page.

1. Select **Permits** on the Agency Springboard.
2. On the Permits page, select a permit record with a status of Plan Review.

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3. In the navigation panel, select **Permit Information** > **Plan Reviews** .

4. In the Documents grid, expand the row for the document you want to review.

5. Click the **View More Details** button for the row you want to override.

6. On the Plan Reviewer Decision Details page, select a value from the **Override Decision** list.

   You can select from these decisions:

   ◦ Approved

   ◦ Approved with Comments

   ◦ Revision Required

   ◦ Rejected

   ◦ Not Required

7. Click the **Save** button.

   The system updates the plan reviewer's **Decision Date** timestamp and enters Yes in the **Override** field.

> **Note:** If the plan coordinator overrides the last review for the last document in the plan review cycle, the override action changes the status of the plan review cycle to Completed.

6 Working with Permit Inspections

Managing Inspections for a Permit

The permit information includes a consolidated list of inspections related to a permit. As a permit coordinator, you manage inspection activity for a permit—including status, inspection results, code or requirement violations, and more—on the Inspection List page.

As agency staff or a registered public user, you use the Inspection List page to view a complete list of inspections for a permit application. Go to the inspection list in the permit details to perform these tasks:

- Manage inspection activity.

- View inspections in a calendar format.

- Perform actions, including access inspection details, and request and schedule an inspection.

💡 **Tip:** You can access this page on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using. For more information about using the Overview page on a phone, see the *Oracle Inspector Overview*.

This example shows the Inspection List page for a permit containing the field values for inspections described in the following table.

Monitoring Inspection Activity

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions – Permits page, click the row for the permit application you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.
4. On the Inspection List page, you can monitor inspection activity in these fields:

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Page Element	Description
Inspection	View the inspection number that was automatically generated based on the autonumbering definition in the inspection type. The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see *Setting Up Inspection Types*.

Status	View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:
	
	   o Scheduled
	   o Requested
	   o Completed
	   o Canceled
	
	A date and time is displayed beneath the Completed statuses to indicate when the inspection was completed.

Inspector	Identifies the inspector assigned to the inspection. The date and time of the scheduled inspection is displayed beneath the inspector's name.
Property	View the address of the property associated with the inspection.
Result	View whether the inspection passed or failed.

Viewing the Inspection Calendar

You can view the inspections for a permit using the list view, grid view, or on a calendar. To change the view on the Inspection List page:

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions - Permits page, click the row for the permit application you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.
4. On the Inspection List page, use the following buttons to change your view:

Page Element	Description
☰	Click to display inspections using the list view. This is the default view for public users.
▦	Click to display inspections using the grid view. This is the default view for agency staff.
📅	Click to view inspections on a calendar. Click the inspection entry in the calendar to view more inspection information.

Performing Actions from the Inspection List

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions - Permits page, click the row for the permit application you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.
4. You can perform these actions from the Inspection List page:

Page Element	Description
Request Inspection	Click to request an inspection on the Inspection Request page. See *Requesting Inspections*.
Actions	Click the icon in this column to select one of the following actions: ○ View Request: Click to review, update, or cancel an inspection on the Inspection Request page. See *Requesting Inspections*. ○ View Detail: Click to view the inspection details on the Inspection Detail page. See *Reviewing Inspection Details*.

Managing Inspections for an Agency

Agency staff and system administrators manage activity for all of their agency's inspections on the Inspections page.

Use the Inspections page to view a complete list of inspections for the entire application. From this page you can access inspection details, view inspection schedules, and submit inspection requests.

> 💡 **Tip:** You can access this page on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using. For more information about using the Overview page on a phone, see the *Oracle Inspector Overview*.

This example shows the Inspections page.

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Viewing Inspection Information

1. Select **Inspections** on the Agency Springboard.
2. On the Inspection List page, use the following buttons to change your view:

Page Element	Description
	Click to display inspections using the list view. This view is intended for public users.
	Click to display inspections using the grid view. This is the default view when you access the Inspection List page.
	Click to view inspections on a calendar. Click the inspection entry in the calendar to view more inspection information.

3. On the Inspections page, you can view inspection information in these fields:

Page Element	Description
Inspection	Displays the automatically generated inspection number. The inspection type is displayed beneath the inspection number. For more information on inspection types, see *Setting Up Inspection Types*.
Permit	Displays the automatically generated permit number associated with the inspection. The permit type is displayed beneath the permit number. For more information on permit types, see *Setting Up Permit Types*.
Status	Displays the inspection status. Valid values are: ○ Scheduled ○ Requested

Page Element	Description
	o Completed o Canceled A date and time is displayed beneath the Completed status to indicate when the inspection was completed.
Inspector	Displays the name of the inspector assigned to the inspection. The date and time of the scheduled inspection is displayed beneath the inspector's name.
Property	Displays the address of the property associated with the inspection.
Result	Indicates whether the inspection passed or failed.

Performing Actions for Inspections

1. Select **Inspections** on the Agency Springboard.
2. On the Inspections page, you can perform the following actions:

Page Element	Description
Request Inspection	Click to request an inspection on the Inspection Request page. See *Requesting Inspections*.

Actions	Click the icon in this column to select one of the following actions:
	
	   o View Request: Click to review, update, or cancel an inspection on the Inspection Request page. See *Requesting Inspections*.
	
	   o View Detail: Click to view the inspection details on the Inspection Detail page. See *Reviewing Inspection Details*.

Requesting Inspections

Agency users can request inspections for permits to ensure that they are in compliance.

You request, modify, and cancel inspection requests on the Inspection Request page.

Tip: You can access this page on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using. For more information about using the Overview page on a phone, see the *Oracle Inspector Overview*.

Requesting an Inspection

1. Click the **Request Inspection** button from one of the following locations:

   o Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.

   o Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

   > **Note:** The button is also available to registered public users on the Inspection List page, which they access from the Registered Public Landing Page by clicking **Inspections** or by selecting Schedule an Inspection from the **I Want To** field.

2. On the Inspection Request modal page, select the **Permit** for which you want to request an inspection and an **Inspection Type**.

   > **Note:** If you are requesting an inspection from the Inspection List page for a specific permit, the **Permit** is already selected on the modal page. Additionally, the inspection types available to select on the modal page are determined by the inspection group that is associated with the permit type. See *Setting Up Inspection Types*.

3. Click **Continue**.

   > **Note:** If you selected a permit for which a condition has been applied that prevents inspection scheduling, you will receive an error when you click **Continue** and you won't be allowed to request the inspection. For more information on applying and resolving conditions, see *Applying Conditions to Applications*.

   This example shows the Inspection Request page.

4. On the Inspection Request page, enter values using the following fields:

Page Element	Description
Ready by Date and **Ready by Time**	Enter the date and time by which the permit will be ready for the inspection you are requesting.

Page Element	Description
	Note: These fields appear only for inspection types with a **Scheduling Method** of Request. See *Setting Up Inspection Types*.
Comments	Enter any comments for the inspection.
Address	Displays the address associated with the inspection. For new inspection requests, this field displays the default address associated with the permit record. The default address is the primary address for the primary parcel associated with the permit record. For more information on parcel addresses, see *Setting Up Parcel Addresses*
Change Address	Click to associate the inspection with another address that is already defined for the permit record. **Note:** This button appears only if multiple addresses have been defined for the permit record.
Inspection Location	Enter location information associated with the inspection.
Location Contact	By default, the system populates this field with the primary contact associated with the permit. Click the **Change Location Contact** icon to select a different contact name on the Change Location Contact modal page. **Note:** When you change the location contact, the **Contact Method, Email,** and **Phone** fields are populated with the new contact's information.
Contact Method, Email, and **Phone**	Select a contact method from the following values: o None o Email When you select this value, the **Email** field becomes available. Use it to enter the contact's email address. o Phone

Page Element	Description
	When you select this value, the **Phone** field becomes available. Use it to enter the contact's phone number.

> **Note:**
> By default, the value of the **Contact Method** is Phone and the phone number of the applicant for the permit associated with the inspection request is displayed in the **Phone** field. If a phone number is not entered for an applicant, the default value of **Contact Method** is Email and the email address of the applicant is displayed in the **Email** field. If neither a phone number nor an email address are defined for the applicant, the default value of **Contact Method** is None and the **Phone** and **Email** fields are not displayed.

5. Click **Select a Time** to access the Scheduling modal page where you can select a date and time for the inspection.

   This example shows the Scheduling modal page.

Scheduling   ✕

Permit E2E-190529-00008	**Duration in Hours** 2
Inspection Type E2E_InsElectric Description	**District** E2E_District

Date	Time	Select
Wednesday, July 17, 2019	9:00 AM ▼	Select
Thursday, July 18, 2019	9:00 AM ▼	Select
Friday, July 19, 2019	9:00 AM ▼	Select
Saturday, July 20, 2019	9:00 AM ▼	Select
Sunday, July 21, 2019	9:00 AM ▼	Select
Monday, July 22, 2019	9:00 AM ▼	Select

The dates and times that are available for inspection scheduling are based on the following factors:

- Type of inspection and when the inspection can be performed.
- District of the parcel.
- Inspectors assigned to the district and inspection type.
- Availability of the inspectors according to work and holiday schedules.

For more information, see *Setting Up Inspection Scheduling*.

> ✎ **Note:** The **Select a Time** button appears only for inspection types with a **Scheduling Method** of Schedule.

6. Click **Save**.

If the Inspection Requested communication event is configured, the system can automatically create an email notification to the permit technician that an inspection request has been created. For more information, see *Delivered Communication Events*.

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Modifying an Inspection Request

1. Select the **View Request** action for an inspection from one of the following locations:

    o   Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.
    o   Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

    > **Note:** The action is also available to registered public users on the Inspection List page, which they access from the Registered Public Landing Page by clicking **Inspections** or by selecting Schedule an Inspection from the **I Want To** field.

2. Update the field values on the Inspection Request page.

    > **Note:** You can't edit the **Inspection Type** field. In addition, you can't edit any fields on this page if the status of the inspection is Canceled or Completed.

3. If an inspection time has already been selected, you can click **Select a Different Time** to select a different inspection date and time on the Scheduling modal page.

    > **Note:** The **Select a Different Time** button appears only for inspection types with a **Scheduling Method** of Schedule. The button is not available if the status of the inspection is Canceled or Completed. In addition, the button is not available once the time to the scheduled inspection is less than the number of hours defined in the **Schedule Change Policy** field for the inspection type. For more information on inspection types, see *Setting Up Inspection Types*.

4. Click **Save**.

When you or the applicant reschedule an inspection, the applicant, inspection contact, inspector, and inspection supervisor can receive a notification, depending on the communication template setup.

Canceling an Inspection Request

> **Note:** An inspection request is canceled automatically when an agency staff member withdraws the application associated with the request.

1. Select the **View Request** action for an inspection from one of the following locations:

    o   Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.
    o   Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

    > **Note:** The action is also available to registered public users on the Inspection List page, which they access from the Registered Public Landing Page by clicking **Inspections** or by selecting Schedule an Inspection from the **I Want To** field.

2. Click **Cancel Inspection**.

> **Note:** The **Cancel Inspection** button does not appear for inspections with a status of Canceled or Completed. In addition, the button is not available once the time to the scheduled inspection is less than the number of hours defined in the **Schedule Change Policy** field for the inspection type. For more information on inspection types, see *Setting Up Inspection Types*.

3. Enter a **Cancellation Reason** on the Cancel Inspection modal page.
4. Click **Confirm**.

When you or the applicant cancel an inspection, the applicant, inspection contact, inspector, and inspection supervisor can receive a notification, depending on the communication template setup.

Assigning Inspections Using the Supervisor Calendar

Inspections supervisors assign and schedule inspections using the Supervisor Calendar page.

Assigning Individual Inspections

1. Click **Supervisor Calendar** on the Agency Springboard.

   This example shows the Unassigned tab of the Supervisor Calendar page.

   The Unassigned tab of the Supervisor Calendar page lists inspections that meet all of the following criteria:

   - No inspector is assigned.
   - The status is Requested.
   - The inspection request ready by date is less than or equal to the date selected at the top of the page.
   - The inspections are associated with the district and inspection types that are assigned to the current supervisor user.

   For each inspection, the tab displays the following information:

Page Element	Description
Permit	Displays the permit ID associated with the inspection. Click to access the Permit Details page. **Note:** Because this page displays the permit ID for inspections, you may see multiple inspections with the same permit ID.
Inspection	Displays the inspection number that was automatically generated based on the autonumbering definition in the inspection type. The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see *Setting Up Inspection Types*.
District	Displays the district associated with the inspection.
Property	Displays the address of the property associated with the inspection.
Duration in Hours	Displays the expected duration of the inspection in hours.
Ready by Time	Displays the date and time when the permit is ready for the inspection.

2. (Optional) Use the **Previous Day, Next Day,** and **Select a Date** buttons at the top of the page to adjust which inspections are displayed. The tab displays unassigned inspections with a ready by date that is less than or equal to the selected date.

3. Click **Assign** for the inspection that you want to assign.

   The Scheduling modal page lists the dates that are available for you to schedule the inspection.

   This example shows the Scheduling modal page for an inspections supervisor.

4. Select an available **Time** from the drop down list and click **Select** next to the inspector and date on which you want to schedule the inspection.

   If an inspector is not available for the date and time that you want, you can expand the **Override Availability** section of the modal page to manually assign an inspector for a specific date and time. Select the **Inspector**, **Date**, and **Time** and click **Select** to assign the inspection. This is useful when supervisors need to load balance inspectors and ensure that each inspection is assigned to an inspector.

If the Inspection Scheduled communication event is configured, the system can automatically create an email notification to the inspector and inspection contact when the inspection has been scheduled and assigned to the inspector. For more information, see *Delivered Communication Events*.

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Assigning Inspections in Batch

1. Click **Supervisor Calendar** on the Agency Springboard.
2. (Optional) Use the **Previous Day, Next Day,** and **Select a Date** buttons at the top of the page to adjust which inspections are displayed. The tab displays unassigned inspections with a ready by date that is less than or equal to the selected date.
3. Click **Edit**.

   This example shows the Unassigned tab of the Supervisor Calendar page with the Edit button selected.

   Supervisor Calendar

	Permit	Inspection	District	Property	Duration in Hours	Ready by Time
☐	CK-2019-00092	CKFNL-2019-00074 FNL Security Inspection	CK_INSPECTION_DISTRICT_FNL	3904 Shree2, Cabell Avenue Shree2 Arlington	2	6/30/19 05:00 PM
☐	CK-2019-00076	CKFNL-2019-00076 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	2	6/30/19 05:00 PM
☑	CK-2019-00097	CKFNL-2019-00084 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	2	7/6/19 10:00 PM
☐	CK-2019-00137	CKFNL-2019-00091 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	2	7/9/19 12:06 AM
☑	CK-2019-00039	CKFNL-2019-00103 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	2	7/16/19 09:00 AM
☐	CK-2019-00176	CKFNL-2019-00108 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	1	7/13/19 12:00 AM
☑	CK-2019-00177	CKFNL-2019-00109 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	1	7/13/19 12:00 AM
☐	CK-2019-00181	CKFNL-2019-00111 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Shree1, Cabell Avenue Shree1 Arlington	1	7/15/19 12:00 AM

4. Select the check box next to each inspection that you want to assign.
5. Click **Assign** to run the automatic batch assignment process. The process assigns inspections based on:

   - Inspector qualifications
   - Inspector availability
   - Work schedules
   - Holiday schedules

   For more information on these inspection scheduling factors, see *Setting Up Inspection Scheduling*.

Reassigning Inspections

1. Click **Supervisor Calendar** on the Agency Springboard.
2. Select the **Assigned** tab.

   This example shows the Assigned tab of the Supervisor Calendar page.

Supervisor Calendar

The Assigned tab of the Supervisor Calendar page lists inspections that meet all of the following criteria:

- o An inspector is assigned.

- o The status of the inspection is Scheduled.

- o The inspection scheduled start date is equal to the date selected at the top of the page.

- o The inspections are associated with the district or inspection types that are assigned to the current supervisor user.

Assigned inspections display the following information:

Page Element	Description
Permit	Displays the permit number associated with the inspection. Click to view detailed information about the permit. **Note:** Because this page displays the permit ID for inspections, you may see multiple inspections with the same permit ID.
Inspection	Displays the inspection number that was automatically generated based on the autonumbering definition in the inspection type. The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see *Setting Up Inspection Types*.
District	Displays the district associated with the inspection.
Property	Displays the address of the property associated with the inspection.

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Page Element	Description
Duration in Hours	Displays the expected duration of the inspection in hours.
Inspector	Displays the name of the inspector assigned to the inspection.
Schedule Start Date and **Schedule End Date**	Displays the dates and times when the inspection is scheduled to start and end.

3. (Optional) Use the **Previous Day, Next Day,** and **Select a Date** buttons at the top of the page to adjust which inspections are displayed. The tab displays assigned inspections with a scheduled start date that equal to the selected date.

4. Click **Reassign** for the inspection that you want to reassign.

   The Scheduling modal page lists the dates that are available for you to reschedule the inspection.

   This example shows the Scheduling modal page for an inspections supervisor.

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5. Select an available **Time** from the drop down list and click **Select** next to the inspector and date on which you want to schedule the inspection.

If an inspector is not available for the date and time that you want, you can expand the **Override Availability** section of the modal page to manually assign an inspector for a specific date and time. Select the **Inspector**, **Date**, and **Time** and click **Select** to assign the inspection. This enables supervisors to assign inspectors outside the hours of their normal work schedules, schedule inspectors on holidays, or double book inspectors by assigning them to two inspections at the same time. Double booking may occur when multiple inspections are required at the same address.

Viewing Assigned Inspections

Inspectors access property inspections assigned to them and inspection supervisors can view their inspectors' assignments on pages they access on their laptops or desktops, and also through the Oracle Inspector mobile inspections application on their phones.

Viewing Inspections Assigned to Me

As a building inspector, you can find the inspections assigned to you on the Task Management page on your desktop or laptop.

Your scheduled inspections on a phone appear on the My Inspection Tasks page when access the application, Oracle Inspector. For more information, see *Oracle Inspector Overview*.

To view a list of the scheduled inspections assigned to you on the Task Management page:

1. Select the **My Inspections** link on the Agency Springboard.
2. The Task Management page opens with a predefined filter to select tasks with the Inspection type.

   You can also use the filter button to filter by additional parameters, including task name, permit ID, permit type, status, last updated date, or assigned by.

   Inspection assignments appear in the task grid.
3. Click the **View More Details** button for a permit record to open the Inspection Detail page.

For information about inspection details for a permit, see *Reviewing Inspection Details*.

Viewing Inspections Assigned to My Inspectors

As an inspection supervisor, you can view the assignments for your inspectors on the Inspections page on your desktop or laptop.

This example illustrates the Inspections page with these field values: permit ID and permit type, inspection ID and inspection type, inspection status, assigned inspector, property address, and inspection results.

To view a list of inspections:

1. Select the **Inspections** tile on the Agency Springboard or in the menu go to **Inspections** > **Inspections** .

2. The Inspections page opens. You can sort by these values in the list:

   o Permit

   o Permit Type

   o Inspection

   o Inspection Type

   o Status

   o Date

   o Inspector

3. Click the **Schedule** button to open the Inspection Request page, where you can view the inspection schedule as well as schedule a different time or cancel the inspection.

   For more information the schedule for an inspection, see *Requesting Inspections*.

4. Click the **View More Details** button to open the inspections information for a permit in the permit details pages.

Viewing the Daily Schedule for Inspections Assigned to My Inspectors

As an inspection supervisor, you can view the inspection assignments for a selected day on the My Inspection Tasks page on your desktop, laptop, or phone. The My Inspection Tasks page provides access to the Oracle Inspector mobile inspections application. You see the inspections that are assigned to inspectors in your inspection district.

This example illustrates the My Inspection Tasks page containing the field values described in the following table. There is no inspection result, rating, or score for the scheduled inspections, because the inspector has not entered results. The inspection isn't complete until the inspector submits the inspection results with required signatures.
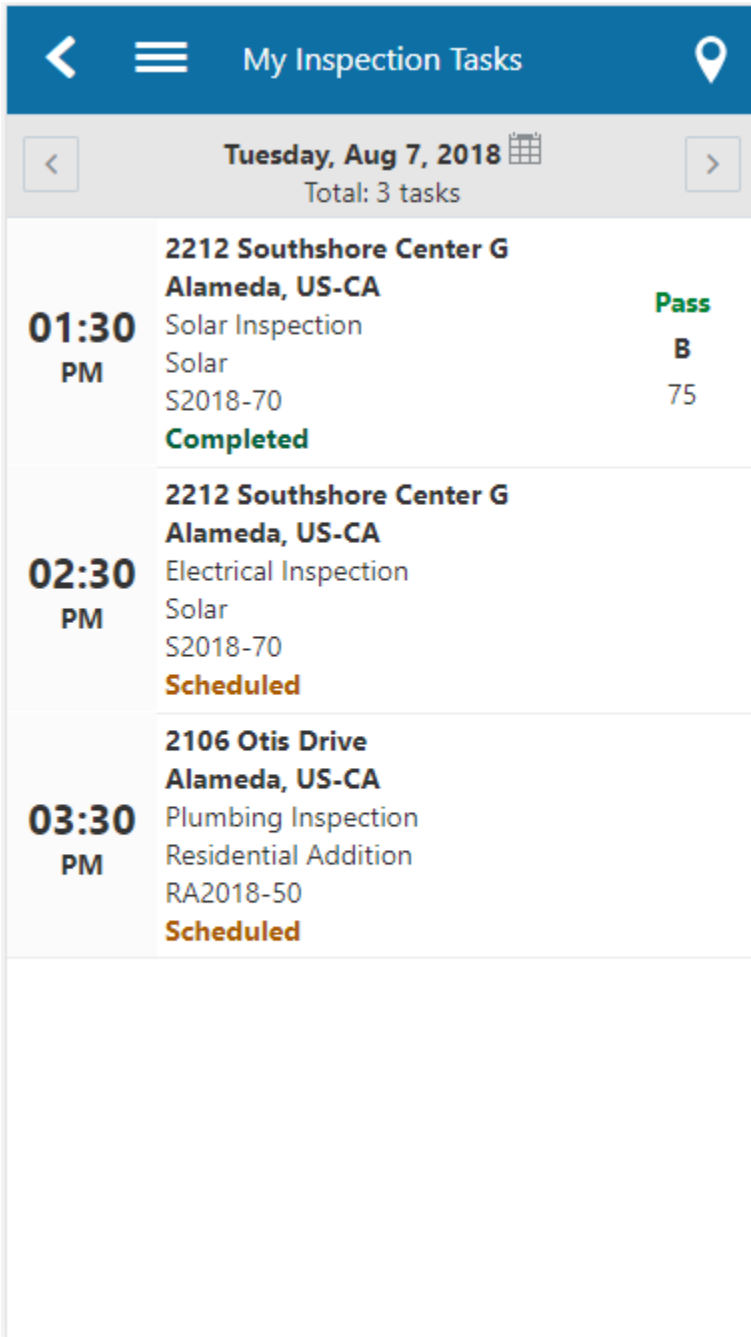
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To view the daily inspection schedule:

1. Click the **Navigator** button in the global banner on your desktop, laptop, or phone.
2. Select **Inspections** > **Mobile Inspections** .
3. The My Inspection Tasks page opens in Oracle Inspector. On the My Inspections Task page, you can:

   - View the daily inspection job list on a calendar or map for the inspectors in your inspection district.

   - View property address, inspection type, permit type, and permit ID for each inspection.

   - View the inspection status and results for completed inspections.

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      ○ Identify inspections with conditions or restrictions.

4. You can perform these actions:

Page Element	Description
	Click to view the inspections for the day on a map.
	Click to open a calendar where you can navigate to a specific date to see the inspections scheduled for that day.
	Click the icons to navigate to the previous day and next day, where you can see the inspections scheduled for the day.

5. Click the inspection task row to open the Inspection Details page. From here you can make changes to the inspection, such as update attachments, add or update comments, and add inspection results.

Related Topics
- Oracle Inspector Overview

Reviewing Inspection Details

You keep track of the details for an inspection, including the inspection location, schedule, results, and contact, on the Inspection Detail page.

This example illustrates the Inspection Detail page for a completed inspection. The fields are described in the following table.

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Agency staff can access details for a permit inspection from the permits in the transactions list or through task management on their desktop or laptop. This topic discusses accessing inspection details for a permit from the agency Transactions page. For information about accessing inspection details from the Task Management page, see *Viewing Assigned Inspections*.

When you perform an inspection using Oracle Inspector on your phone, you access the inspection details from your inspection task calendar. For more information, see *Oracle Inspector Overview*.

Reviewing the Inspection Details for a Permit

To navigate to details for an inspection from the permit list:

1. Select the **Permits** tile on the Agency Springboard.
2. On the Transactions – Permits page, click the row for the permit application you are working with.
3. Click **Inspections** in the left navigation panel.
4. On the Inspection Detail page, review the address and property location. You can also review inspection information in these sections:

Page Elements	Description
Schedule section	Review the inspection schedule, including the inspection status, the scheduled date and timeframe for the inspection, and the person who last updated the schedule and when. For more information about inspection schedules, see *Requesting Inspections*.
Result section	Review the inspection results, rating, score, and number of major violations of completed inspections. For more information about results, see *Viewing Inspection Results*.
Contact section	Review the contacts, including the assigned inspector, and the location contact and email address. Any comments added by the requester during scheduling appear in this section.
Signature section	View the signatures added when the inspection is complete in the Oracle Inspector mobile application. Signatures are required depending on the inspection setup.

5. To view a report of the inspection summary, click **View Summary Report**.
6. To access other details about the permit, click the permit number link under the Inspection heading. For more information, see *Working with Permit Details*.

Viewing Inspection Documents

You view documents attached to the inspection at the inspection, checklist, or checklist item levels. The documents are for reference after the inspector added them during the inspection using the Oracle Inspector mobile application.

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This example illustrates the Inspection Attachments page, which is described in the surrounding text. You can view documents added during the inspection on the Attachments page.

Inspection
MBL-190213-00002   JCPERMANUAL
MBL_INSTYPE_1   CK-2019-00017

«

Details

Comments

Attachments

Attachments

File Information	Description	Source	Reference	Actions
Payload1.txt File Size: 3,332 Uploaded On: 2/14/19 1:50 AM Uploaded By: BUILDING_INSPECTOR	Result			⋮
Payload1.txt File Size: 3,332 Uploaded On: 2/13/19 8:42 AM Uploaded By: BUILDING_INSPECTOR	Details page	Inspection		⋮
Payload2.txt File Size: 3,332 Uploaded On: 2/13/19 8:43 AM Uploaded By: BUILDING_INSPECTOR	checklist item2	Checklist Item	Checklist: MBL_CHKLST_1 Description Checklist Item: MBL_ListItem1	⋮
Payload2.txt File Size: 3,332 Uploaded On: 2/13/19 8:43 AM Uploaded By: BUILDING_INSPECTOR	checklist item	Checklist Item	Checklist: MBL_CHKLST_1 Description Checklist Item: MBL_Item2	⋮
AttachUploadDummyFile.txt File Size: 118 Uploaded On: 2/14/19 5:14 AM Uploaded By: BUILDING_INSPECTOR	Attach Item1	Checklist	Checklist: MBL_CHKLST_1 Description	⋮

Reviewing Inspection Documents

You view documents attached to the inspection at the inspection, checklist, or checklist item levels on the inspection attachments page.

1. Select the **Permits** tile on the Agency Springboard.
2. Click the row for a permit application to access the details.
3. Click the **Inspections** menu item in the left panel.
4. On the Inspection List page, click the **View Details** button to access the details for the selected inspection.
5. Click the **Attachments** menu item in the left panel to review the following information on the Attachments page:

Page Element	Description
File Information	View the following information in the **Filename** field: o Filename with file type extension o File Size o Uploaded By user name o Uploaded On date
Description	View the description of the attachment as entered by the person who added the attachment.
Source	View the level at which the document was added. In the Oracle Inspector mobile application, inspectors can add documents at the inspections level, at the checklist level, and at the checklist item level.
Reference	View the checklist name and checklist item name associated with the document, if applicable.

Page Element	Description

Actions	Click the actions icon to select and perform an action:
	
	  o View Details - Open the details modal page to view the attachment details.
	
	  o Download - Click to save the document to your computer.

6. Click the **Sort By** to view attachments grouped by the available fields:
   - File Name
   - File Size
   - Uploaded On
   - Uploaded By
   - Source
   - Checklist
   - Checklist Item
   - Description

   You can also filter by these fields except for file size and description.
7. To find a specific attachment, you can enter values in the search field.

Viewing Inspection Results

The inspector performs an inspection by assessing whether building requirements for the permit have been met. This topic discusses how results are calculated when using automatic calculation.

The inspector evaluates a building site for adherence to codes and regulations required for a permit. The agency can setup up inspections to use manual scoring or automatic score calculation with the bottom up scoring method. Scoring bottom to top indicates that the inspector starts with a zero score and adds points for each criterion that is met. The higher the score, the better the results.

A permit might require one or more inspections, each inspection might have one or more checklists, and each checklist might have checklist items or not, depending on the inspection configuration. The inspector performs an inspection by assessing the checklist items, if any, then checklists, and up to the inspection level. The evaluation results that the inspector enters are rolled up to the next level until final inspection results are calculated.

At the end of an inspection, comments and the final assessment determined during the inspection are displayed in the permit details for the agency staff and the permit applicant, on a desktop or laptop. Review these permit pages:

- Overview page
- Inspection List page
- Inspection Detail page

You can both submit and review inspection results for your inspections on your mobile device in Oracle Inspector. For more information, see *Oracle Inspector Overview*.

Page Element	Description
Result	View the final result of the inspection based on the passing rule defined by your agency. If scoring is used, the result appears after you complete the inspection checklists and submit a complete inspection with required signatures. If scoring is not used, the result displayed is the result you enter manually.
Rating	View the inspection rating, which is based on the range of scores defined by the agency.
Score	View the inspection score, if scoring is used, as defined on the inspection type by the agency. The score is calculated from your entries for the checklist items.
Major Violation	Identify the number of major violations on the inspection.

This example illustrates the Inspection Detail page containing the field values for inspection results described in the preceding table.

For more information about the pages used to set up the inspection evaluation calculations, see the Implementing Oracle Public Sector Permits guide.

7 Using Oracle Inspector

Oracle Inspector Overview for Permits

Use the Oracle Inspector mobile application to manage a variety of property inspections for permits on a daily basis.

Oracle Inspector provides government field staff the ability to enforce code compliance using productivity tools to perform and report on inspections from a mobile device. Before you begin, You must download the Oracle Inspector application for your mobile device from the iOS App Store for Apple iOS devices or Google Play for Android devices. For information about installing the application and configuring the agency's host URL, see *Installing and Configuring Oracle Inspector*.

> ✎ **Note:** Agency administrators must explicitly grant mobile application access to the necessary agency user roles before you can install and configure Oracle Inspector. For more agency setup information, see *Setting Up Users for Oracle Mobile Applications*.

Viewing My Inspection Tasks

You start on the My Inspection Tasks page when you log into Oracle Inspector. On the My Inspections Task page, you can:

- View the daily inspection job list on a calendar or map.

- View property address, inspection type, permit type, and permit ID for each inspection.

- View the inspection status and results for completed inspections.

- Identify inspections with conditions or restrictions.

This example illustrates the My Inspection Tasks page containing the field values described in the following table. There is no inspection result, rating, or score for the scheduled inspections, because the inspector has not entered results. The inspection isn't complete until the inspector submits the inspection results with required signatures.

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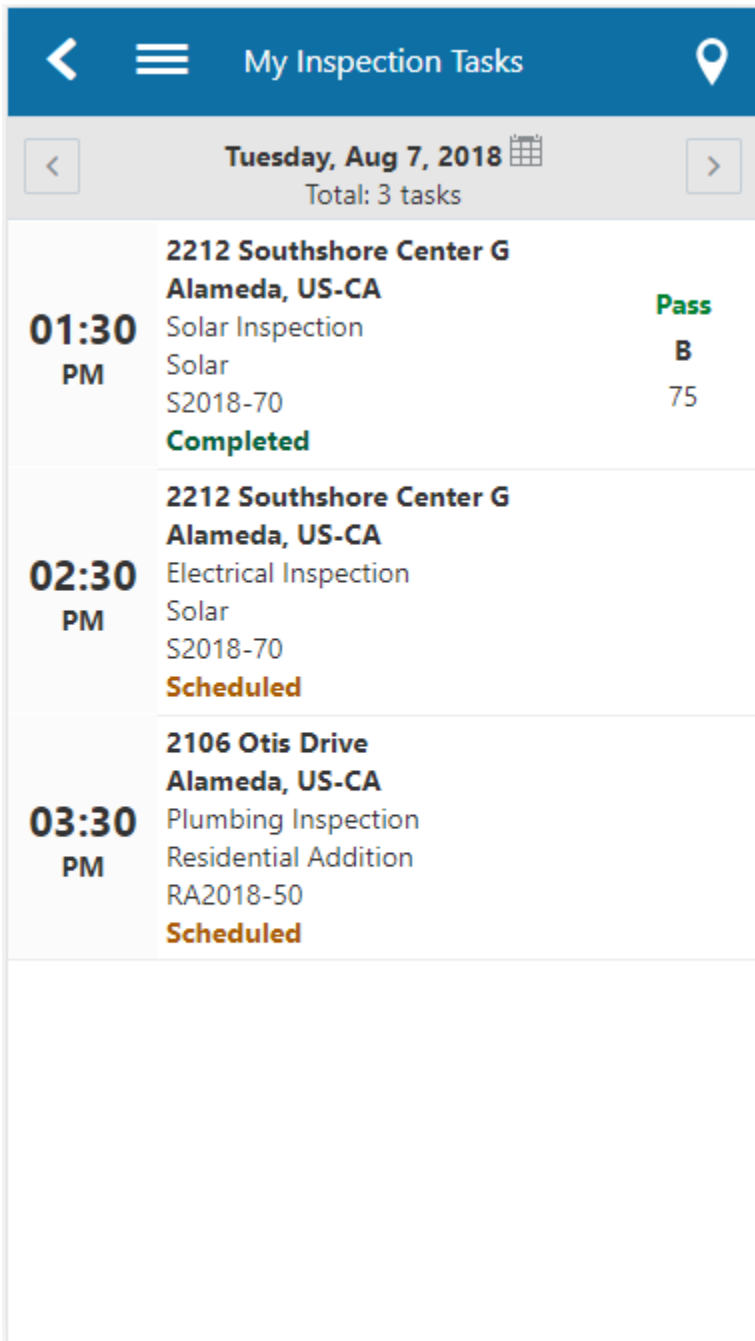
The My Inspections Tasks page provides a daily calendar view with inspections organized by scheduled time.

Left Column	Middle Column	Right Column
Time using 12-hour clock AM or PM	Summary of Assigned Inspection: • Property Location • Inspection Description • Permit Type	Results for Completed Inspection: • **Result** - Did the inspection pass? For example, Pass.

Left Column	Middle Column	Right Column
	• Permit Number Inspection Status – For example, Scheduled, Completed, or Canceled.	• **Rating** - What is the inspection grade? For example, F. • **Score** - What is the overall total score of the inspection? For example, 0. • **Condition** - Is there any condition applied on the permit? The most severe condition is displayed. For example, if there are three conditions including Notice, Hold, and Lock, the Lock icon is displayed. **Note:** Values for Inspection results are configured by the agency.

To update your estimated time of arrival at the property, swipe an inspection from left to right. Click the **Update ETA** button. A notification with the updated time of arrival is sent to the contact for the inspection.

You can navigate to the previous and next day's schedule using the buttons in the header, or click the calendar icon next to the date in the header to go to the schedule for a specific date.

Working with Inspection Details

You view inspection details, such as inspection number, location, and description, and initiate actions for performing inspections on the Inspection Detail page. You can:

- Access permit details associated with the inspection.

- Locate the inspection site on a map.

- Review inspection status, rating, score, and number of major violations of completed inspections.

- Identify the inspector and location contact.

- Read requester comments and special location instructions.

- Update your estimated time of arrival at the property.

- View the inspection summary report.

This example illustrates the Inspection Detail page containing the field values described in the following table.

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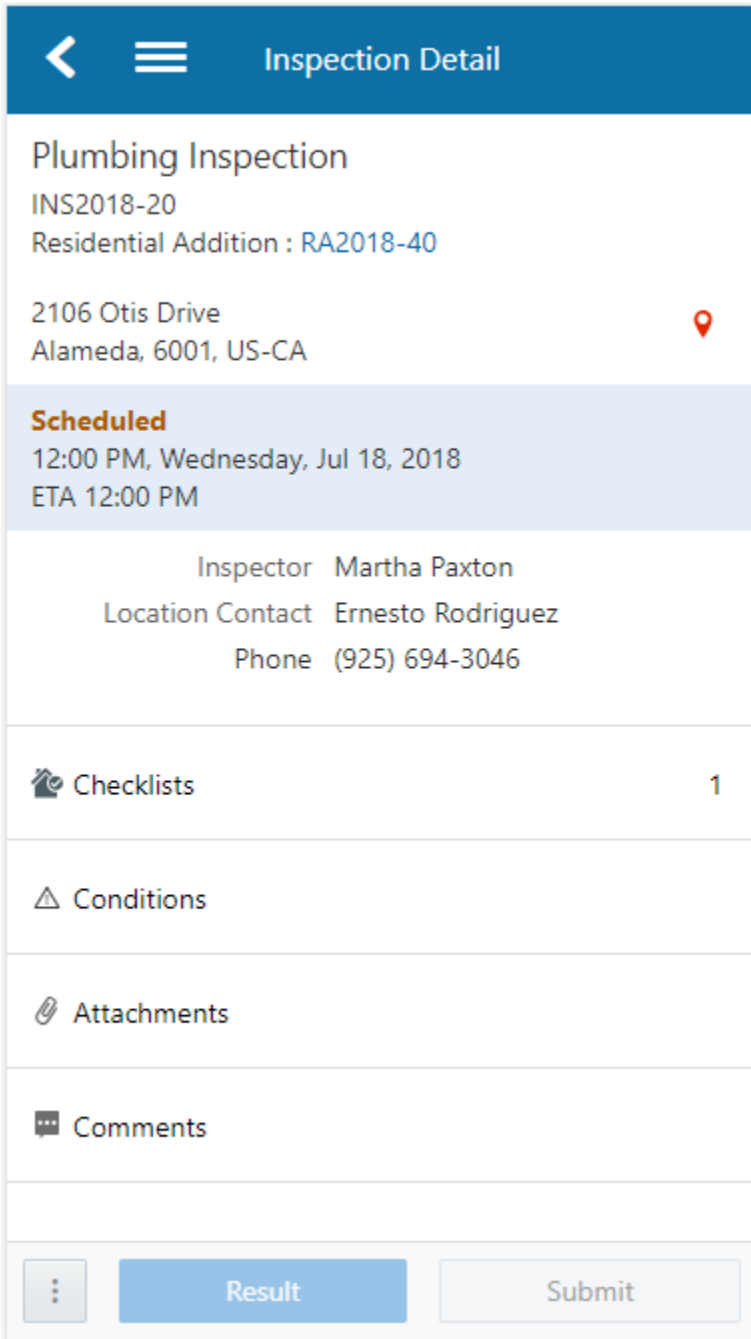
In addition to the inspection ID and inspection type, you can view these inspection details:

- Location

- Status

- Scheduled date and time

- Estimated time of arrival (ETA)

- Inspector

- On-location contact person

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- Comments added by the inspection requester

You can also perform these actions on the Inspection Detail page:

Page Element	Description
Permit number	Click the permit number link to access permit details.
◉	Click the map icon to view the location of the property on a map.
Checklists	View the number of checklists to complete for the inspection. Click to open the Inspection Checklist page.
Conditions	Click to open the Conditions page in the permit details. Review permit conditions that might affect the inspection status and apply conditions. An icon indicates the type of condition that was applied, such as a lock. If there are multiple conditions applied to the permit, the most severe condition is displayed here. For more information about conditions, see *Applying Conditions to Applications*.
Attachments	View the number of documents attached to the inspection. Click to open the Attachments page, where you can review or upload attachments or documents related to the inspection, such as videos or annotated photos. On the Attachments page, you can also search for, filter, and sort attachments and select which inspection attachments you want to view. You can choose to view all documents, documents attached at the inspection level, or documents for checklists and checklist items.
Comments	Click to open the Comments page. Review or add comments related to the inspection. Inspector comments are visible to the public unless the agency selects an option to hide them. Go to the Inspection Checklist and Checklist Items pages to view the comments made for checklists and checklist items.
More	Click the **More** icon at the bottom of the page to do the following: • **Update ETA** – Update your estimated time of arrival at the property. When an inspection is scheduled, the system automatically assigns an estimated time of arrival (ETA). On the Update ETA page, enter or scroll to a time in 5-minute intervals. You can only update the ETA before the inspection is complete. • **View Summary Report** – View the inspection summary report.
Result	Click this button to calculate the inspection results, based on the evaluation rules set up by the agency. If an inspection is set up with checklists, you can select the result only after all checklists have results. If your inspection is set up by the agency to calculate scores automatically, the system totals the scores for checklists and checklist items. The higher the score, the better the inspection results.

Page Element	Description
Submit	Click this button to access the Inspection Result page, where you sign off on the inspection and submit signatures for the contractor and property owner, if required.

Viewing the Permit Summary in the Oracle Inspector Application

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

For more information about the Overview page and its functionality on a laptop or desktop computer, see *Viewing the Permit Summary*.

To open the Overview page, click the permit ID link under the inspection type on the Inspection Details page. When you access the Overview page, you can:

- Review a summary of property, applicant, workflow, and inspections information.

- Add or update an expiration date for the permit.

- Add or update a description of the permit.

- Print the building permit to a PDF file.

- Access project and fee details.

If the permit application is associated with a project or there are fees and payments, you can click the information that is displayed on the Overview page to access details. You can also access project and fee details by using the navigation menu located on the page title.

This example illustrates the Permit Overview page in the Oracle Inspector.

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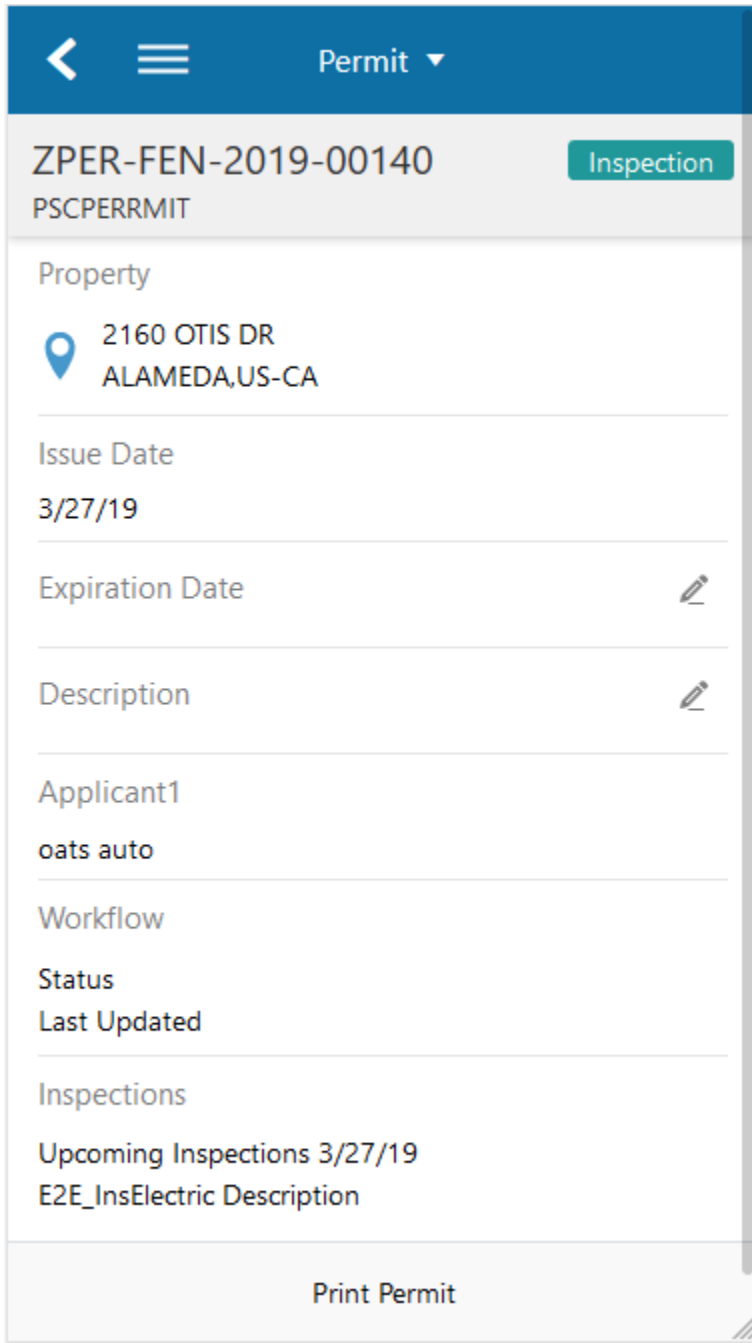
Working with Conditions

If conditions have been applied to a permit, an icon appears on various pages to indicate the type of condition, such as lock, hold, or notice. If there are multiple conditions applied to the permit, the most severe condition is displayed, that is, a lock. When you access the Conditions page, you can:

- Review existing conditions applied to the permit.

- Review condition details.

- Resolve existing conditions.

- Apply new conditions.

A permit condition can prevent an inspector from submitting the inspection results. In that case, a message indicates details about the condition that was applied.

This example illustrates the Conditions page containing the field values described in the following table.
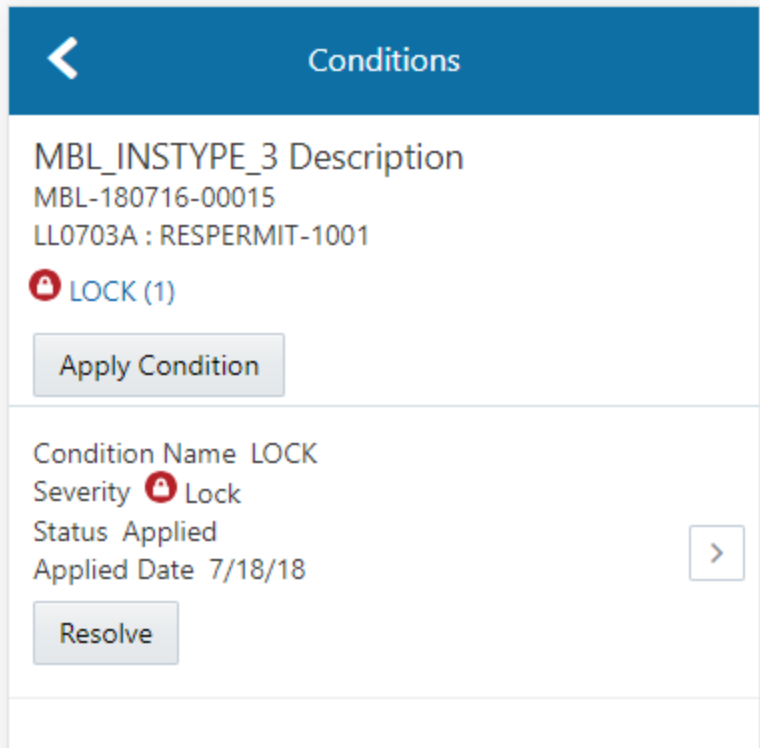
Page Element	Description
Apply Condition	Click this button to add a new restriction to the permit. See *Applying Conditions to Applications*.
Resolve	Click this button to resolve the restriction that was applied to the permit.
	Click the detail icon to access condition details. You can resolve the condition on the details page.

Opening the Map View

Use the map icon to open a map view on these pages:

- My Inspection Tasks
- Inspection Detail

The map icon looks like this:

📍

Click the map icon on the My Inspection Tasks page to view the location of inspections scheduled for the day.

Click the map icon on the Inspection Detail page to view the property location of the selected inspection:
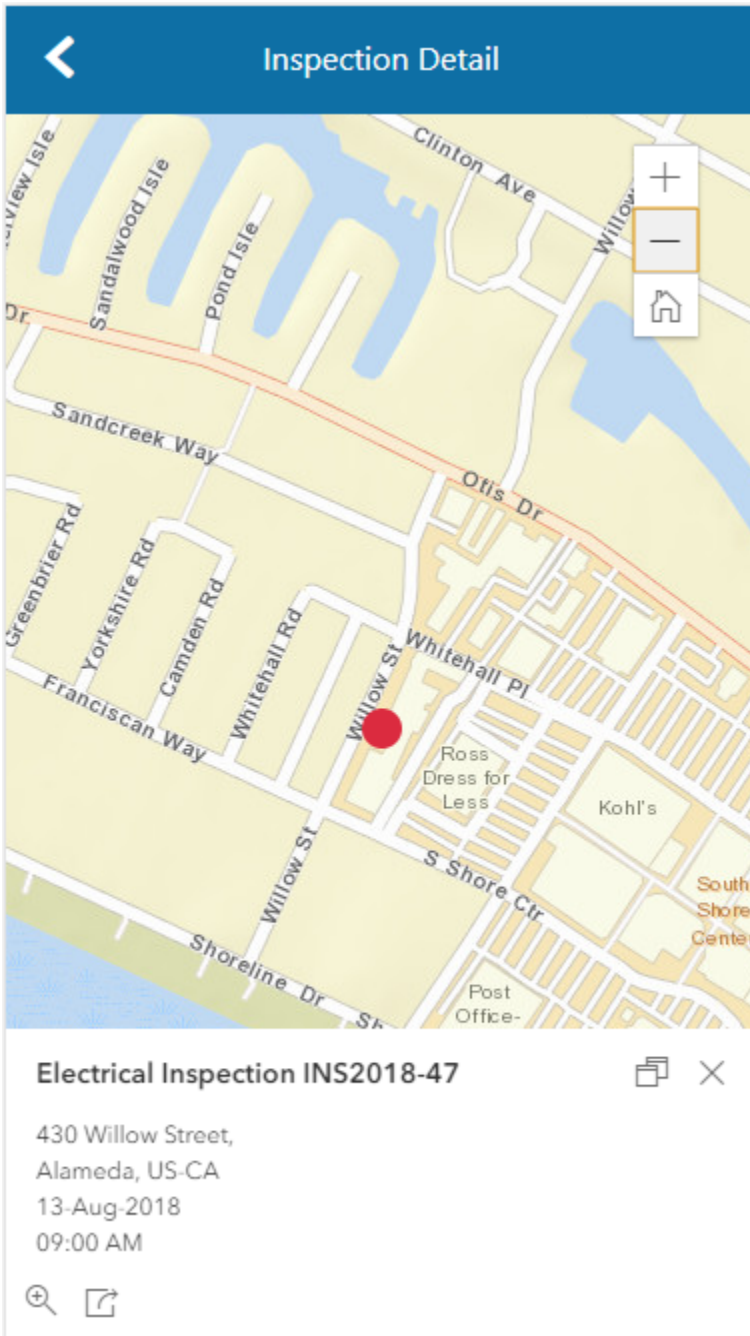
In addition to an interactive map, the map view includes the inspection name, inspection number, property address, and scheduled date and time of the inspection.

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Using Inspection Checklists

An inspection can have one or more checklists that cover the scope of the codes and requirements. At the checklist level, you can:

- View results progress, if the inspection has checklist items.

- Access checklist items.

- Provide a result for the checklist.

- Review or add checklist attachments.

- Review or add checklist comments.

This example illustrates the Inspection Checklist page containing the field values described in the following table.

Page Elements	Description
Checklist	Click the checklist row to open the Checklist Items page.
Result	Displays No Result, Pass, or Fail after calculating the entered checklist results, where No Result is the default value if the checklist results have not been added. Results are defined by the agency. Common results are Pass, Fail, Corrected on Site, Not Applicable, and Not Observed. If the inspection was set up by the agency to use scoring, the system automatically

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Page Elements	Description
	populates the result based on the scoring method. If scoring is not used, the inspector must manually add the result. **CAUTION:** You can't update the inspection result on the checklist items, checklists, and inspection when a condition to prevent the inspection result has been applied. You must resolve the issue first and when necessary, reschedule the inspection.
Progress indicator	Displays percentage in a progress ring and count how many of the checklist items have been evaluated.
Comments	Click to open the Comments page for the checklist level. Review or add comments related to the checklist.
Attachments	View the number of documents attached to the inspection. Click to open the Attachments page, where you can review or upload attachments or documents related to the inspection, such as videos or annotated photos. On the Attachments page, you can also search for, filter, and sort attachments and select which inspection attachments you want to view. You can choose to view all documents, documents attached at the inspection level, or documents for checklists and checklist items.

Working with Checklist Items

Depending on the permit requirements, an inspection may have checklists with one or more checklist items, or none at all. On the Checklist Items page, you can:

- View a list of checklist items.
- Enter a result for each checklist item.
- Click a checklist item to access the Checklist Item Results page.

This example illustrates the Checklist Items page described in the surrounding text.

Select a result for each checklist item. When you choose a failing result for a checklist item, the Inspection Result Items page opens so that you can add comments and attachments as support documents for the failing result. For information about comments and attachments, see the information about comments and attachments at the inspection and checklist levels.

You can also select a result for multiple checklist items by using the **Edit** button. In this case you must assign the same result to all of the selected items.

Click the checklist item row to open the Checklist Item Result page.

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On the Checklist Item Result page, you can:

- Review or add checklist attachments.

- Review or add checklist comments.

- Scroll through the item results.

This example illustrates the Checklist Item Result page described in the surrounding text. No results have been provided for this inspection.

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Submitting Inspection Results

On the Inspection Result page, you can:

- Sign off on the inspection.

- Capture the contractor and property owner signatures.

- Add inspection comments and attachments as support documents.

> ✏️ **Note:** Inspectors can't submit a completed inspection if required signatures are missing. The agency determines which signatures are required during the implementation of Oracle Public Sector Permits.

> ✏️ **Note:**

This example illustrates the Inspection Result page with inspector and contractor signatures.

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Click the row for **Inspector**, **Contractor**, or **Property Owner** to access the field for adding a signature. Click **Save**.

When you complete an assigned inspection and submit inspection results, the applicant or agency staff receive a notification that the inspection is complete, regardless of the inspection results. The communication includes an overview of the inspection status change and the result of the inspection. Your agency determines whether the notification is sent by email or online notification when the user logs into the permits service.

When you submit the final inspection for a permit with a passing result, the permit technician or applicant receives a notification or email, depending on the communication template setup.

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Installing and Configuring Oracle Inspector

You must install and configure the Oracle Inspector to use the mobile inspections application in the field.

Oracle Public Sector Community Development Permits provides a mobile inspections application for agency staff to download and install on their mobile devices. The Oracle Inspector mobile application is not intended for use by the public. Although the Oracle Inspector mobile application is intended mainly for phones, you can download the application to other mobile devices, such as tablets.

Before You Begin

Before you begin installing and configuring the Oracle Inspector mobile application, you must have:

- An agency staff profile

  Make sure that you have an agency staff profile to log into the mobile application. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Agency administrators set up the agency staff profiles.

- Appropriate security

  Agency administrators must explicitly grant mobile application access to you. You can open the application but need the proper credentials. The only roles that have access to the mobile application are building inspector and inspector supervisor.

For more information for agency system administrators setting up profiles and security, see *Setting Up Users for Oracle Mobile Applications*.

Installing Oracle Inspector

You must install the Oracle Inspector mobile application on your mobile device from the iOS App Store for Apple iOS devices or Google Play for Android devices. Follow the instructions for installing Oracle Inspector provided by the application store.

Configuring the Oracle Inspector Environment

1. On your mobile device, access the email that you have received from your administrator and click the Mobile Application Activation link.
2. Click the **Agree** button on the End User License Agreement page the first time you open Oracle Inspector or when you reinstall the mobile application.

   You must agree to proceed to the next step.
3. The confirmation page appears with the Application Host URL automatically populated. Click the **Get Started** button.

   This example illustrates the page in Oracle Inspector where the user enters the host or agency URL that connects to the agency permits service.

4. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.

   This example illustrates the user login page for Oracle Inspector.

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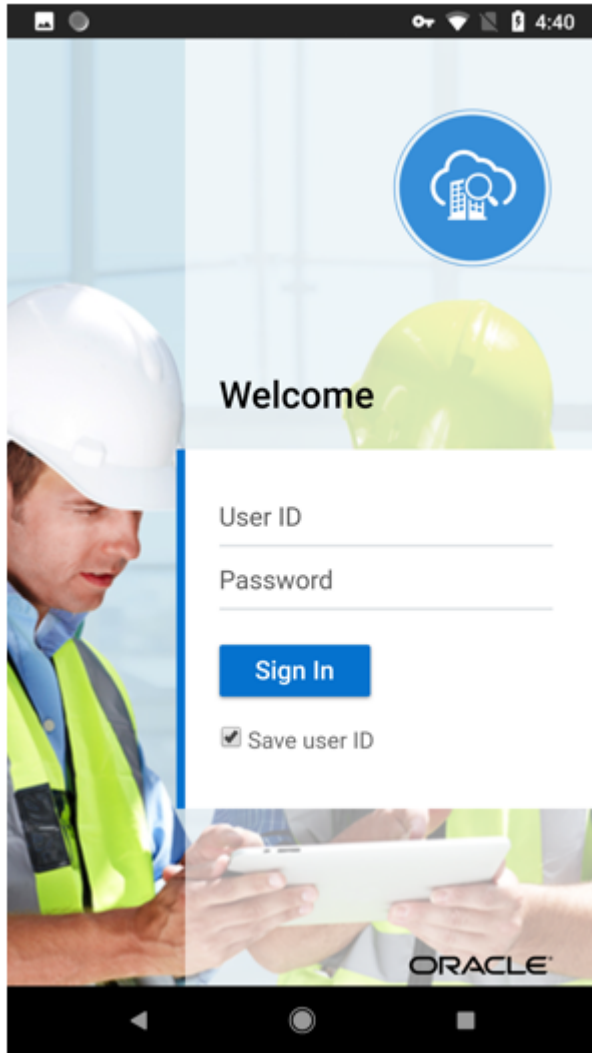
5. Select the **Save user ID** check box, if desired. The next time you return after logging out, you don't have to reenter your user ID.

6. After your login credentials are successfully authenticated, the setup page appears with a progress bar displaying the progress of the package download.

7. After installation completes, the application home page – My Inspection Tasks – appears for the current day.

   This example illustrates the My Inspection Tasks page, which is the first page the user sees when entering the Oracle Inspector application. For inspectors, the page shows the assigned inspections for the day. For supervisors, it shows inspections assigned to inspectors within their district.
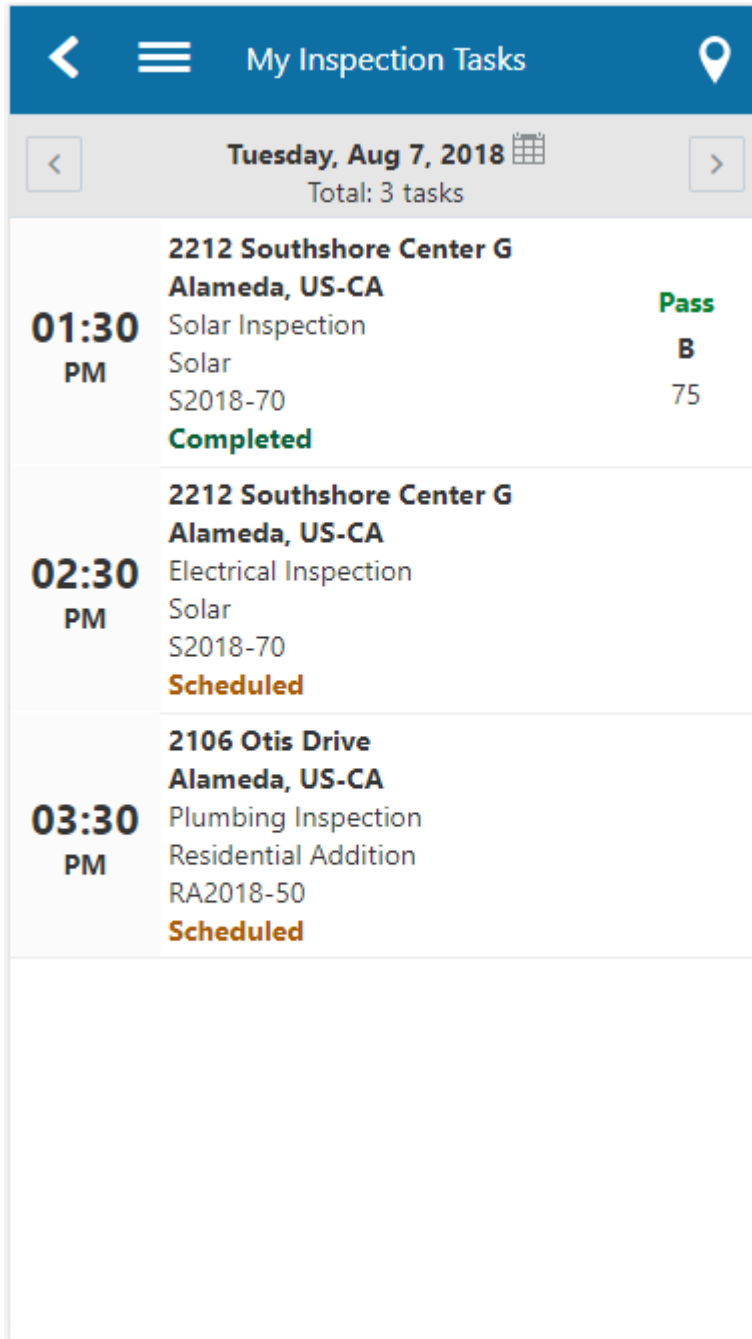
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For more information about inspection tasks in Oracle Inspector, see *Oracle Inspector Overview*.

Resetting the Application Host URL

If the agency administrators want you to use a new URL, you can reset the URL through the application.

To change the host URL:

1. Log in to Oracle Inspector using your Community Development Permits login credentials.
2. Click the global navigation button in the upper left corner of the application:

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When you click the button, you'll see a list of menu items.

3. Click the **Reset Application URL** link in the menu to open the Reset Application URL page.

This example illustrates the Reset Application URL page, which is described in the surrounding text.
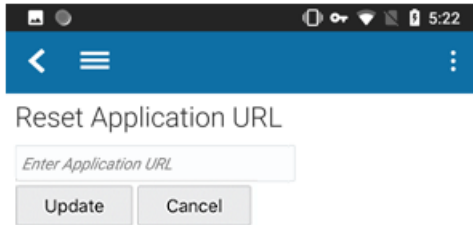
4. Enter the desired application host URL in the field.
5. Click the **Update** button.
6. Log back into Oracle Inspector using your login credentials.

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8 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:

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
- Visualize transactional data
- 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:
	
	    ○ 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: ○ Active

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Page Elements	Description
	○ Canceled ○ On Hold ○ Inactive ○ Completed
Estimated Valuation	Enter an estimated amount for the project.
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 various links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, 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.

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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*.

  ○ 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.

  ○ 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.

  ○ 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: ○ Date ○ Transaction ID ○ Status
Alert icon	Identify transactions with a status affected by a condition or if they are pending submit.
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 hole, for example.
Total paid	Displays the amount of the total fees already collected.

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Page Elements	Description
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:

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Page Elements	Description
	○ 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 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: ○ View Details ○ Download ○ 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 Data Visualization 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 **Data Visualization** on the left panel to access graphical charts that display the comparative data related to transactions within the selected project. These graphical charts are organized in three separate tabs, with a grid each displaying a list of all the transactions within the project:

   ○ **Fees by Transaction Type**: The chart displays all the project transactions represented as bars – each bar grouping transactions by the transaction type, along with the total amount of fees applicable. Click a bar to list all the transactions for that transaction type with their details at the bottom of the page.
   ○ **Fee Details**: The chart displays all the project transactions represented as bars. Each transaction is displayed as a combination of two bars – one bar reads the total amount of all applicable fees and the other reads the total amount of all fees paid. Click a bar to list all the transactional fee item details at the bottom of the page.
   ○ **Inspection Status**: The pie chart displays the inspection status of each of the permits assigned to the project. Click a section of the chart to view the details of the inspections pertaining to the permits at the bottom of the page.

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

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9 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:
	
	  o View Details: Select to view detailed information about the attachment.
	
	  o Download: Select to download the attachment.
	
	  o 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**.

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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.

> ✎ **Note:** : Deleting a parcel record automatically deletes any associated parcel conditions that are applied to the permit or planning application you are working with. See the section Deleting a Parcel under *Working with Property Information*.

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*.
Severity	Displays the level of severity defined for the selected condition. ○ 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	Select the **Prevent New** business rule. **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.
Additional Information	Enter additional information for the condition.
Display Message	Displays the message associated with the selected condition.
Priority	Select a priority for the condition. Values are High, Medium, and Low.
Description	Displays the description associated with the selected condition. You can edit this text.
Apply Condition to Transactions	Turn on the switch to apply the condition to all the new transactions that will be associated with the selected parcel. The following business rules are also applied, If selected at the time of applying the condition: ○ Prevent Workflow Advancing ○ Prevent Issue or Final ○ Restrict Payment ○ Prevent Inspection Schedule

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Page Element	Description
	o Prevent Inspection Result
	Note:
	The business rules listed above appear for selection only when the **Apply Condition to Transactions** option is selected. The condition setup determines whether the this switch is turned off or on by default.
	For more information on business rules, see *Setting Up Conditions*.
Include in-process transactions	Select this check box if you want to apply the condition to all the existing transactions related to the parcel. This option appears only if the **Apply Condition to Transactions** is turned on.
	You can click the **View Impacted Transactions** link to view the list of transactions on which the condition will be applied.

4. Click **Save**.

Resolving a Condition

You can resolve a condition that you applied 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 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. Select the **Resolve conditions applied to transactions** switch to resolve the condition that is impacting any other transactions associated with the parcel.

    Use the **View Impacted Transactions** link to access a page that lists all the impacted transactions within the selected parcel.
5. 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.

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

4. Click **Save**.

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10 Working with Maps

Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. Maps show the locations of parcels and addresses as well as showing locations of transactions such as permits, planning applications, projects, incidents, and cases.

> **Note:** Map functionality relies on integration with a third-party map service such as Esri Geographic Information Systems (GIS).

This example shows the map that registered public users use to see permit, planning application, and project locations.
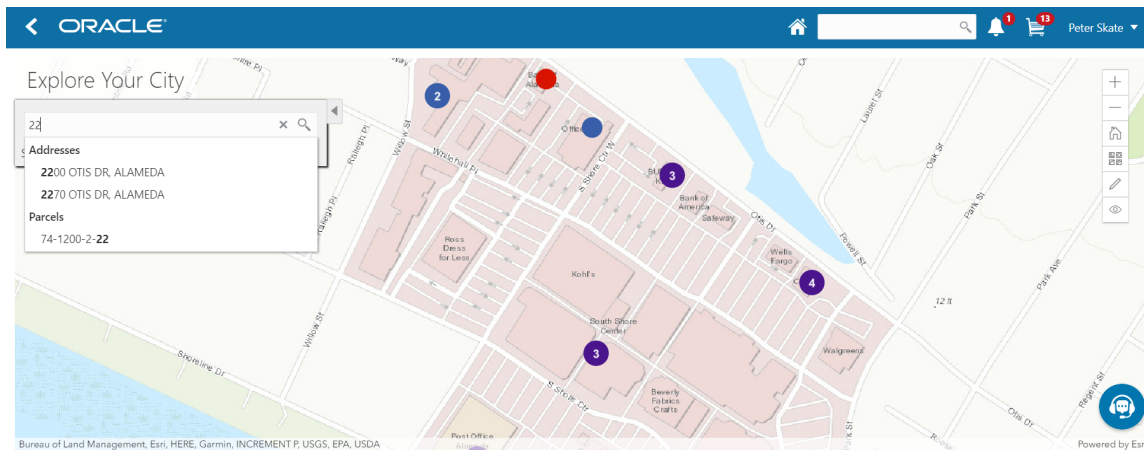
The following tables describe the delivered maps in the Oracle Public Sector system.

Main Maps for Permits, Planning Applications, and Projects

This table lists the main maps that display the agency's permits, planning applications, and projects. There are separate maps for different users. For more information, see *Using the Main Map and Explore Your City Map*.

Map Name	Users	Navigation	Usage
Agency main map	Agency staff	Click the Map icon in the page header, then click **Main Map** in the drop-down menu that appears.	View existing applications and projects. Search and select properties. View transactions for a selected property. Start new applications for selected properties, and access an interactive guide for selecting application types.

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Map Name	Users	Navigation	Usage
Guest/anonymous user map	Anonymous public users	Guest users click the **Explore Your City** tile on the landing page.	Same as the agency-facing main map, except that anonymous users can't start applications.
Registered public user map	Registered public users	Registered public users click the **Explore Your City** tile on the landing page.	Same as the agency-facing main map, except that registered public users have the additional option of filtering transactions so that only the user's own items appear on the map.

Additional Maps for Permits and Planning Applications

This table lists additional maps that support permits and planing applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the **Property** section of a new or submitted application, then click the **Map View** icon.	Choose the property to associate with the application. See *Working with Property Information*.
Mobile inspection	Agency staff	Use the Oracle Inspector mobile application.	View permits and planning applications on a map. See *Oracle Inspector Overview for Permits*.
Permit list	Agency staff Registered public users	For agency staff: Access the **Permits** list or the **Planning Applications** list. For registered public users: access the **Applications** list. On any of these pages, click the **Map View** icon.	View the locations of the transactions on the list. See *Managing Transactions*.
Public notification	Agency staff	• Click the Map icon in the page header, then click **Public Notification** in the drop-down menu that appears. • From the Planning Application detail page, select a hearing where the schedule is final, then select the **Actions** button and choose **Generate Notifications** from the menu that appears.	Create a notification zone by specifying a distance from selected parcels. 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. See *Creating Map-Based Public Notification Lists*.

Maps for Code Enforcement

This table lists additional maps that support code enforcement:

Map Name	Users	Navigation	Description
Agency - code enforcement	Agency staff	On the Worklist page, go to a tab for managing incidents and then click the **Map View** icon.	View the locations of incidents that appear on the selected worklist tab. See *Using the Worklist*.
Code enforcement issue intake	Registered public users	Follow the guided process for reporting an issue until you reach the page where you enter the issue location.	Identify the location of an issue that is being reported. See *Reporting Issues*.
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the **Location of the incident** option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application. See *Oracle Municipal Code Officer Overview*.
Public - code enforcement	All public users	On the code enforcement landing page, click the **View Recent Issues** tile.	View recent code enforcement issues. See *Viewing Recent Issues*.

Maps in Transaction Headers

This table describes the map that appears in transaction headers:

Map Name	Users	Navigation	Description
Transaction header	Agency staff Registered public users	Access the detail page for the transaction.	The map that appears at the top of various detail pages. For example, this map appears in the detail pages for permits, planning applications, projects, incidents, cases, parcels, addresses, and owners. If the transaction is not associated with a location, the map displays the default area that is defined on the map profile.

Using the Map Toolbar

The general toolbar for maps has tools that relate to the map itself, without regard to specific transactions. This topic describes these general-purpose tools.

> **Note:** Use map profiles to configure which tools are available on a map. For information on configuring which tools appear, see *Setting Up Map Profiles*.

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

Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options. When you click this icon, a list of map profiles appears. The list displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the **Enable Zoom** switch on the map profile.	Use these tools to zoom in or out. You can also double-click a map location to zoom in.
	Show Default Map View	Use the **Enable Default Map View** switch on the map profile.	Click to restore the map to its default (home) display area.
	Select Base Map	Use the **Enable Base Map Gallery** switch on the map profile.	Click to display a pop-up window for selecting a map type such as Streets or Topographic.
	Select Layers	Use the **Enable Map Layers** switch on the map profile.	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.
	Show Attribution (for maps in page headers)	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.	Click to display a pop-up window that identifies the third-party map sources.

| Image	Name	Configuration	Description
(i)	Identify GIS Information (for maps that are not in page headers)	This tool appears if the **Enable Map Layers** switch is on and the map service URL for the profile is configured to allow the display of object details on the map.	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. The map profile settings for **Enable Window Detail Docking** and **Detail Window Dock Position** control where the object detail window appears. However, on mobile devices, the detail window always appears at the bottom of the screen..
✎	Show Selection Tools or Hide Selection Tools	Use the **Enable Selection Tools** switch on the map profile.	Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map.
👁	Show Transactions	Not configurable. This tool appears on the toolbar for the agency Main Map and the public user Explore Your City map.	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 type of transaction. **Note:** For public users (both anonymous and registered), the title of the pop-up window is Show Activity.

Viewing Map Markers

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

Single Marker on the Transaction Header Map

The map in the header of a transaction page shows a single marker for the current object.

This example illustrates the Parcel page, where the map marker shows the parcel's location.

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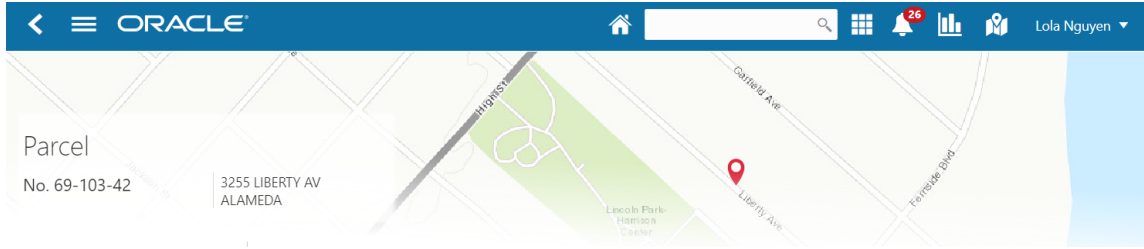
Maps with Multiple Locations Marked

A map that displays all transactions in the area shows different marker icons for a single transaction and for a location with multiple transactions. When a location has multiple transactions, the number of transactions appears on the marker.

When a map's zoom level would cause markers for neighboring locations to overlap, the individual location markers are replaced by a single cluster marker. The number on the cluster marker is the total number of transactions for all locations in the cluster. As you zoom in, the cluster marker disappears and individual location markers appear.

This example illustrates the map for viewing recent code enforcement issues. The red circles, with and without numbers, are individual locations with issues. The orange circle represents a cluster with multiple locations.
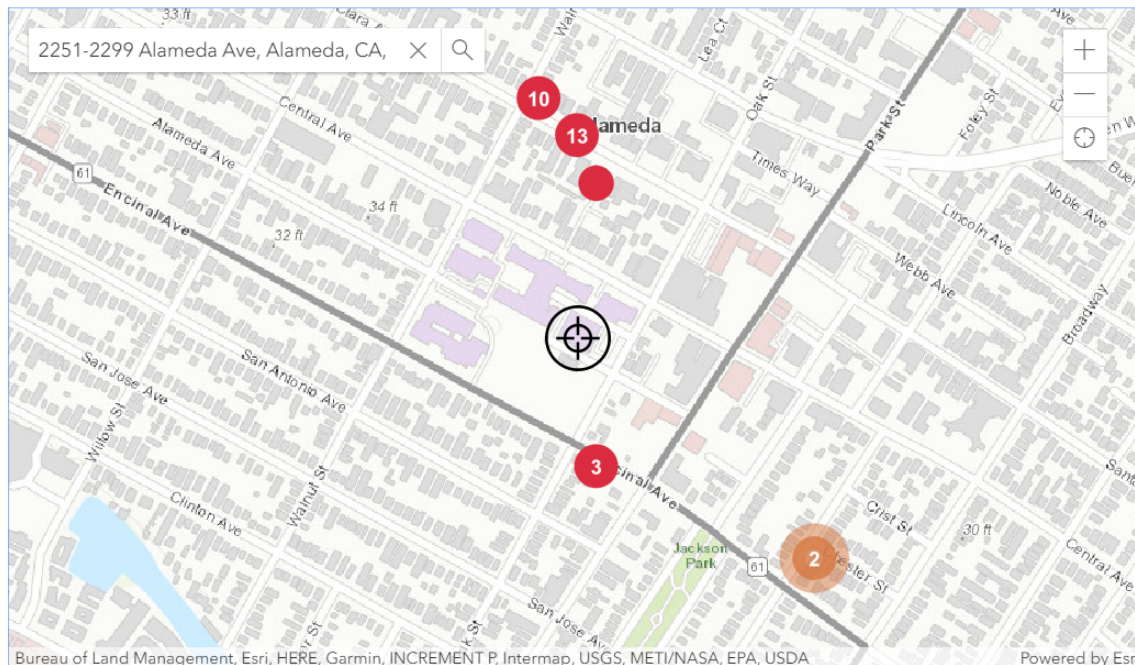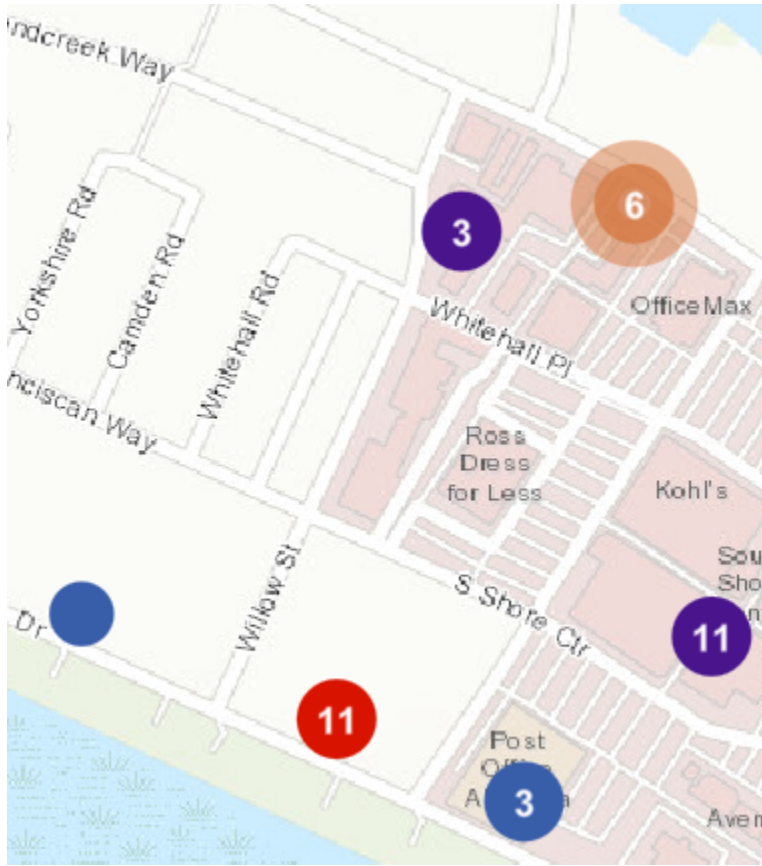

Maps with Markers for Multiple Types of Objects on the Main Maps

The Main Map for agency users and the Explore Your City map for public users can display a mix of transaction types. Each type of transaction has a different color marker.

This example illustrates the Explore My City page, where map markers show application and project locations.

The following table provides a key to the marker colors:

Map Marker	Description
Red	One or more permit applications for the same location.
Blue	One or more planning applications for the same location.
Green	One or more projects for the same location.
Purple	Multiple types of transactions at the same location. This marker can indicate any combination of permit applications, planning applications, and projects.

Viewing Details for a Marker

Clicking a 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

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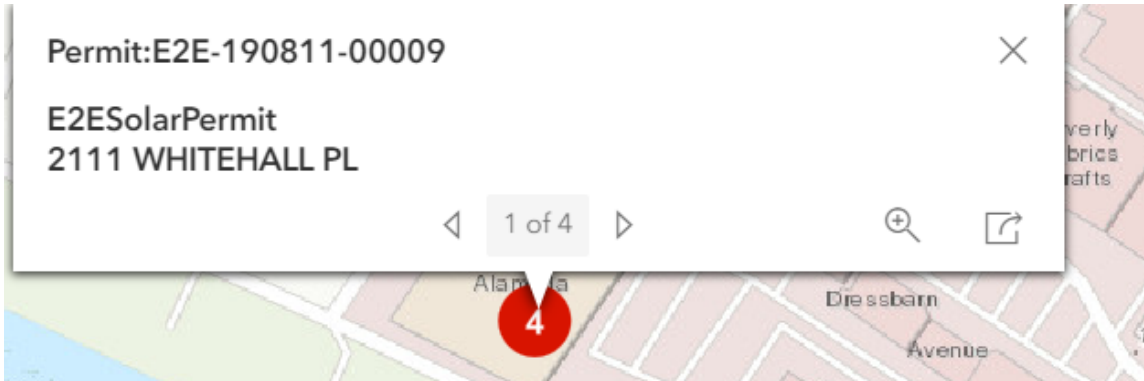
The detail window includes different information for different objects. Here is some of the information that can appear:

- The object ID

  On maps that show multiple types of objects, the object type (such as "Permit") appears along with the object ID.

- The object status.

  Status information appears for incidents and cases, but not for other objects.

- Any applicable categorization, such as a permit type or an issue type and subtype.

- The address for the location.

- Controls for paging through multiple objects, if applicable.

  When there are multiple objects, the paging controls appear around the text <sequence number> of <total number of objects>.

- A **Zoom To** icon for zooming in on the map location.

- A **Go** icon for opening the corresponding detail page in a new window.

Using the Main Map and Explore Your City Map

The agency-facing Main Map and the public-facing Explore Your City map provide options for viewing existing applications and projects on the map and for selecting properties 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 can 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:

- View transaction locations on the map.

  All users can view transaction locations. Registered public users have the additional ability to filter transactions so that only the user's own transactions appear.

- Search for properties based on the address or parcel ID that is stored in the Oracle system.

- Select a property and view existing transactions for that property.

- Access a guide that uses a questionnaire to help the user determine what type of permit or planning application is needed (public users only).

- Start an application for a selected property.

   Anonymous public users cannot start an application.

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

Selecting Properties

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

To select parcels or addresses, use the search feature, or the drawing tools on the selection toolbar, or a combination of both.

When properties are selected:

- Solid blue polygons represent selected parcels.

- Address markers represent addresses that are not associated with parcels.

- The Selected Locations overlay replaces the Search overlay and provides additional information about the selected locations.

- The **Apply** button on the Selected Locations overlay enables registered public users and agency staff to start an application for the selected property.

- The **Guide** button on the Selected Locations overlay enables registered and anonymous public users to access a questionnaire that is configured using Oracle Policy Automation (OPA).

   The **Guide** button appears only if your agency has implemented this functionality.

This example shows a map with selected parcels.

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To select and deselect properties 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 and 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 property, click a single address or parcel number from either the type-ahead list or the full results list.

   The corresponding property is marked on the map, and the search field is replaced by the Selected Locations list.

4. To deselect a single property from the Selected Locations list, click the **Delete** icon for that property.

5. To deselect all properties 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 properties. Each time you select a property, 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 property is selected.

To select and deselect properties 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 property selection:

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Selection Toolbar Button	Description
Draw a Point	Click one or more points on the map to select the properties 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 properties 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 properties that are at least partially within the resulting polygon are selected.
Deselect One	Click a selected property to deselect it. **Note:** Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.
Deselect All	Click this button to deselect all properties.
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 properties are selected.

Working With the Selected Locations List

The Selected Locations overlay enables you to review information about the locations you 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.
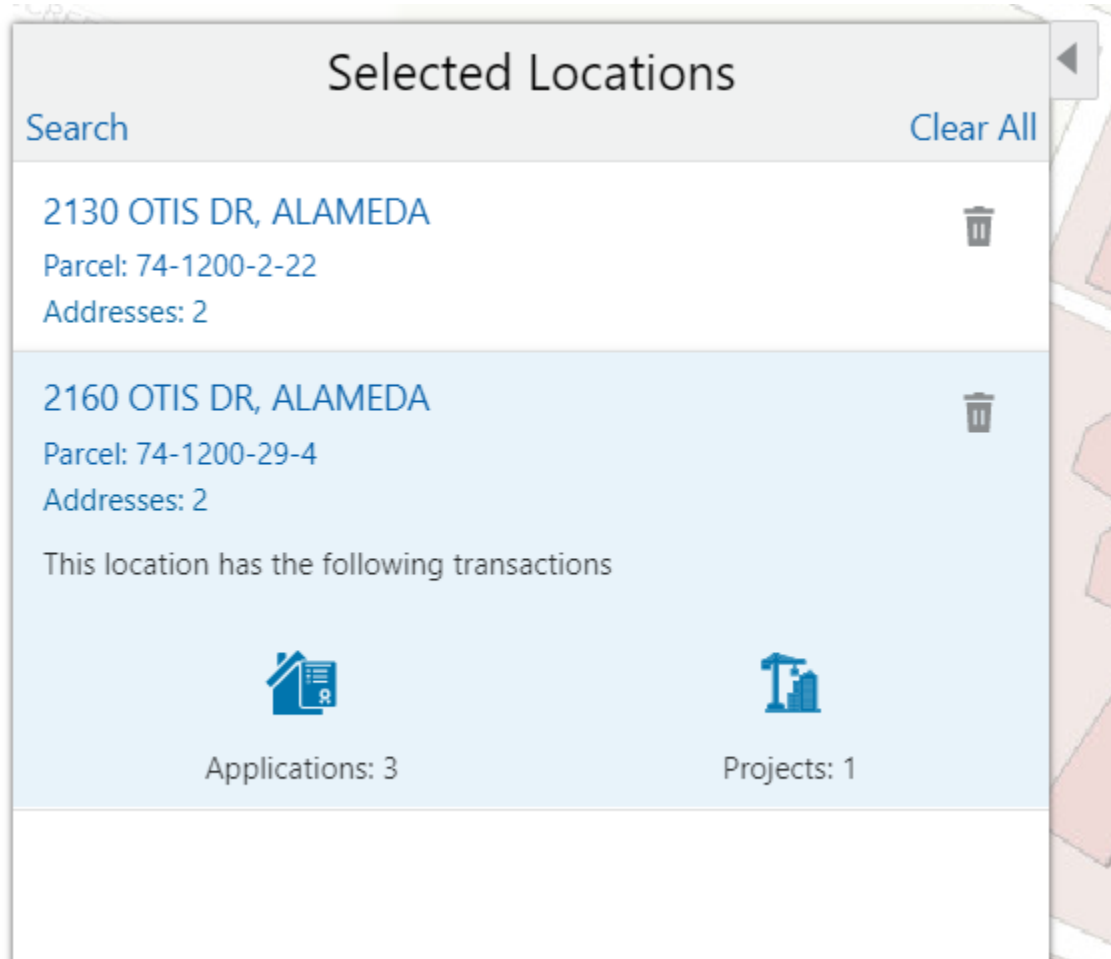
To use the Selected Locations overlay:

1. Review address and parcel information for locations that you selected.

   Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address.

   If you select an address with multiple parcels, each parcel appears on a separate card and all parcels are selected on the map.

   If you select a parcel with multiple addresses, the number of addresses appears as a link below the parcel number. Click the link to display a list of all the addresses. The address list has a back button for returning to the main Selected Locations list.

   Agency staff can access the detail pages for selected addresses and parcels by clicking the address 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 property.

   If the selected property is associated with any applications or projects, the selected card expands and displays icons for **Applications** and **Projects.** The icon label includes a count of the related applications or projects. If the property is not associated with any applications or projects, the selected card looks the same as it does when it's collapsed.

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3. To see a list of applications for a property, click the **Applications** icon.

   The Applications list replaces the Selected Locations list. The list includes these elements:

Page Element	Description
<Address> and <Parcel ID>	The identifying information for the property 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.
<Application Status>	The second column in the application list displays the application status.

4. Click an application to open a new window with the appropriate application details page (the Permit page or the Planning Application page). The window does not have any navigation controls, so the user simply closes the window when done.

   The details are read-only for public users. For agency users, access is based on the user's security.

5. From the applications list, click the return button in the window header to go back to the Selected Locations list.

6. To see a list of projects for a property, click the **Projects** icon.

   The Projects list replaces the Selected Locations list. The list includes these elements:

Page Element	Description
<Address> and <Parcel ID>	The identifying information for the property appears at the top of the list.
<Project ID> and <Project Status>	The first line for each listed project includes the project identifier and the current project status. The identifier is a link that opens a new window with the project details. The window does not have any navigation controls, so the user simply closes the window when done. The details are read-only for public users. For agency users, access is based on the user's security.
<Project Name>	The second line for each listed project displays the project name.
<Project Description>	Under the project name, up to three lines of the project description appear. If the description is longer than three lines, an ellipsis indicates that the text has been truncated.

7. From the projects list, click the return button in the window header to go back to the Selected Locations list.

Starting an Application

To start an application for properties that you select on the map:

1. Confirm that the correct properties are selected.

   As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

2. 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.

   See *Starting an Application*.

3. 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.

   See *Setting Up Agencies* and *Managing OPA Policies for Agency*.

Showing Transactions on the Map

Agency staff, registered public users, and anonymous public users can all view map markers that indicate the locations of permits, planning applications, and projects. Registered public users can additionally filter the map to show only their own activities.

To show transactions on the map:

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

   The Show Transactions overlay appears.

   > **Note:** For public users (both anonymous and registered), the title of this overlay is Show Activity, but this procedure uses the title Show Transactions.

2. In the Show Transactions overlay, use these check boxes to choose if map markers identify application and project locations:

Page Element	Description
All Applications and Projects	When you select this check box, the map displays markers for all applications and projects in the mapped area. Deselecting this check box clears the map markers.
My Applications and Projects or **My Applications**	Only registered public users see this check box. They can select this check box to filter applications and projects so that only the user's own activity is marked on the map. Deselecting this check box clears the map markers.

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Page Element	Description
	This check box and the **All Applications and Projects** check box are mutually exclusive, so selecting one deselects the other. A project is considered the user's project if the user is the primary contact for the project. If the registered public user is a primary contact for any projects, the check box label is **My Applications and Projects.** If the registered public user isn't a primary contact for any projects, the label is **My Applications.**

3. If you choose to show map markers, use the **Showing Results** 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.

4. To filter results by date or by the type of activity (permit, planning application, or project):

   a. Click the **Filter By** button to display additional filter fields.

   b. Enter filter criteria in these fields:

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

   c. 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.

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

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Creating Map-Based Public Notification Lists

The Public Notification map enables you to define an area on a map and generate .csv files for the parcels, owners and addresses that are included in that area. Use the .csv files to create your mailing list. The notification area consists of all properties that are at least partially within a specified distance of the selected property or properties.

A context-specific instance of this page is available for scheduling hearing notifications. See *Generating a Hearing Notifications List*.

The following example illustrates the Public Notification page, where you can select properties, define a notification area around the selection, and download lists of address, parcels, and owners in the notification area.

Public Notification
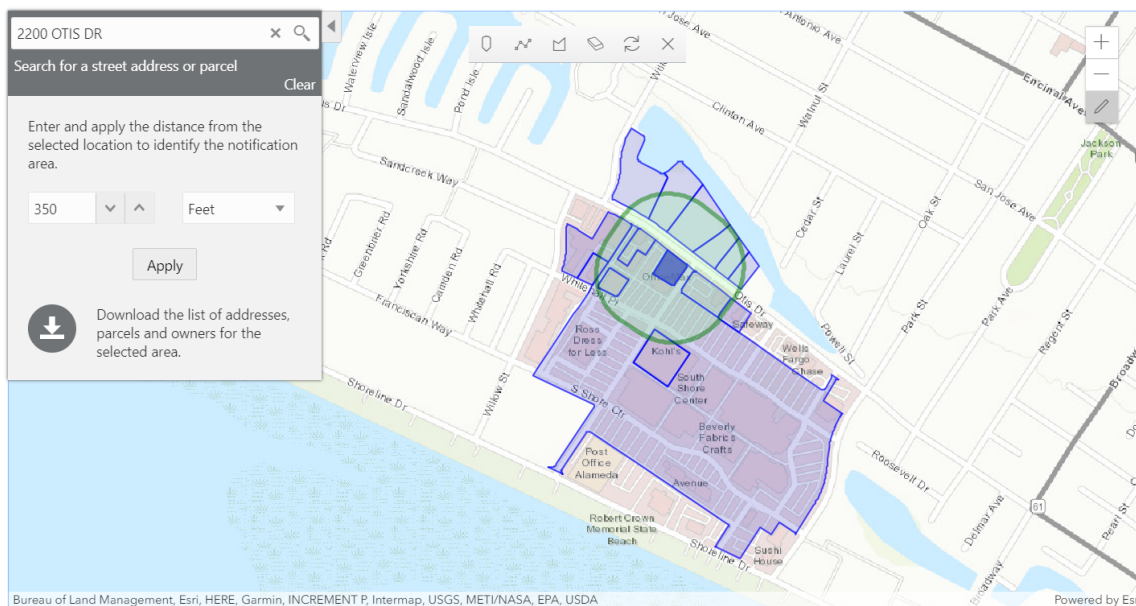
To define a notification area and generate notification lists:

1. Access the Public Notification page.

   To access the page from the global header, click the Maps icon, then click **Public Notification** in the drop-down menu.

   You can also access the page directly from the list of hearings for a planning application. If the hearing schedule is final, the action menu for the hearing includes the **Generate Notifications List** action. This action opens the Generate Notifications List window, which contains the Public Notification page. For more information, see *Generating a Hearing Notifications List*.

2. Select a property, or confirm the default property selection.

   If you access the Public Notification page from a hearing for a planning application, the property or properties from the planning application are selected by default.

   The two methods for selecting properties are:

- Use the search field to search by street address or parcel number, then click the desired property in the type-ahead list or the search results.
- Use selection tools such as **Draw Point, Draw Polyline,** or **Draw a Polygon** to select properties.

For detailed information on selecting properties, see *Using the Main Map and Explore Your City Map*

3. Define the notification area by entering a distance from the selected properties.

The fields for defining the notification area appear below the search field when a property is selected.

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 property is selected.

4. Click **Apply.**

The notification area appears on the map. Visually, it appears as a bold green outline that follows the contours of the selected property at the specified distance. If you selected multiple properties, there can be multiple notification areas. Parcels that are fully or partially within the notification area appear with a blue outline so you can see which parcels are included in the notification list.

5. To change the notification area, modify the property selection, the distance for the boundary, or both, and then click **Apply** again.

If you use add or remove properties from your selection, the notification area is not updated until you click **Apply.**

To clear the property selection and the notification area, click either the **Deselect All** tool or the **Clear** link on the Search overlay.

6. 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.

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

The notification process is not part of the Oracle system.

11 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.

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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.

Page Elements	Usage
Total Amount	Review the number of items to pay now and the total amount selected for payment.
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 on the Cashier Session page.
3. On the Cashier Session Details page you can:
    - Suspend an open cashier session by setting the **Status** to Suspended.
    - Reopen a suspended or closed cashier session by setting the **Status** back to Open.
    - 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**.

> ✎ **Note:** You cannot edit a cashier session that has been reconciled. See *Reconciling Cashier Sessions*.

Reconciling Cashier Sessions

Agency staff adjust and reconcile cashier sessions on the Reconcile Cashier Session page.

Agencies that collect payments must reconcile the money collected in the form of cash and checks at the end of each cashier session. On the Reconcile Cashier Session, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page.

Reconciling Recorded and Actual Amounts

1. Select **Billing and Payment** > **Reconcile Cashier Session** in the Navigator.
2. Click the row for the cashier session that you want to reconcile.

> ✎ **Note:** You can view payment information for open cashier sessions on this page, but a cashier session must be closed before you can reconcile recorded and actual amounts. For more information on closing cashier sessions, see *Working with Cashier Sessions*.

3. Click the row for the payment method that you want to reconcile to access the Payment Details page.

   This example shows the Payment Details page.

Payment Details ×

Save

Payment Summary

Payment Method	Cash	Currency	USD
Opening Balance	100	Total Overage	0
Recorded Amount	93.5	Total Shortage	1.25
Actual Amount	192.25		

Payment Details

Receipt Number	Receipt Line Number	Recorded Amount	Actual Amount	
6	1	67		›
5	1	26.5		›

4. Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

Page Element	Description
Payment Method	Select between Personal check and Cashier check.
Actual Amount	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.
Check Number, Check Date, Payer Name, and **Address**	Update the check and payer information.
Comments	Enter any comments you want to add about the check payment.

5. Click **Save**.
6. On the Payment Details page, enter the actual amount for the cashier session for all receipts for the payment method. After you enter a value in the **Actual Amount** field, the page displays any overages or shortages in the **Total Overage** and **Total Shortage** fields.
7. Click **Save**.
8. On the Reconcile Cashier Session page, enter any comments you want to add for the entire cashier session and click **Save Reconciliation** to save all the changes you made for the cashier session.
9. Click **Complete Reconciliation**. This changes the status of the cashier session from Unreconciled to Reconciled. In addition, the **Save Reconciliation** button is replaced by the **Print Report** button, and the **Complete Reconciliation** button is replaced by the **Generate Event** button.

> **Note:** Once you complete a reconciliation for a cashier session, you can't reopen it or make any adjustments to the session.

Printing a Cashier Session Reconciliation Report

1. Select **Billing and Payment** > **Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to print a reconciliation report.

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3. Complete the reconciliation for the cashier session if you haven't already. You can print reconciliation reports only for sessions with a **Reconcile Status** of Reconcile.

4. Click **Print Report**. The generated report opens in a separate browser tab.

> ✎ **Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Public Sector Compliance and Regulation.

The Cashier Session Reconciliation report requires the definition of a parameter with the following values:

Page Element	Value
Parameter ID	1
Parameter Name	P_RECONCILE_ID
Parameter Data Type	String

For more information on defining parameters for reports, see *Setting Up Reports*.

Generate Accounting Entries for Reconciliation Overages and Shortages

1. Select **Billing and Payment** > **Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to generate an accounting entry.
3. Complete the reconciliation for the cashier session if you haven't already. You can generate accounting entries only for completed reconciliations that result in an overage or a shortage.
4. Click **Generate Event** to generate an accounting entry for the overage or shortage.

> ✎ **Note:** To successfully create accounting entries for cashier reconciliation overages and shortages, you must first create accounting rules for them. For more information on setting up accounting rules, see *Setting Up Accounting Rules*.

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 Deposit Slip (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 file opens in a separate browser tab.

> **Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows 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.

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 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.

Viewing Invoice History

Agency staff can view invoice history on the Invoice History page.

This example shows the Invoice History Details page.

Reviewing Invoice History

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

   > ✎ **Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting View Invoice History from the **I Want To** field. Public users can view only their own invoices.

The Invoices History page displays all of the invoices issued by the agency. You can search for and sort invoices by:

- o Invoice ID
- o Invoice date
- o Person name
- o Invoice amount
- o Invoice currency

2. Select an invoice to view additional details on the Invoice History Details page.

This example shows the Invoice History Details page.
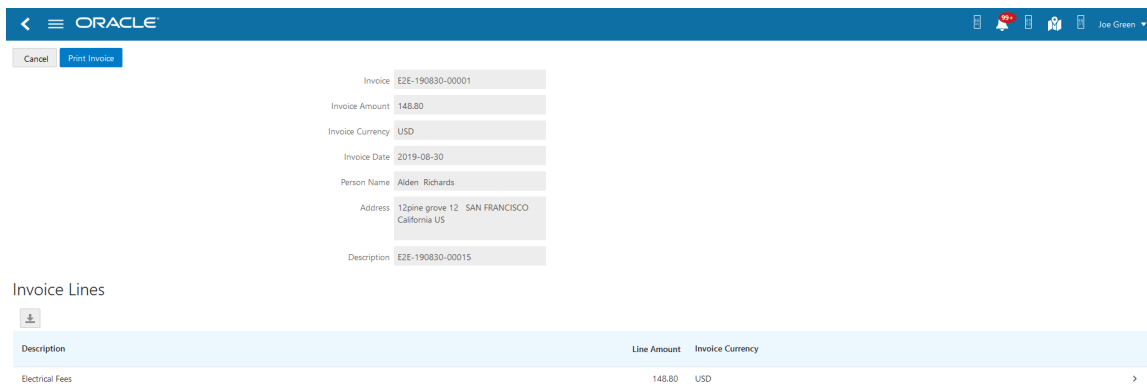
The Invoice Lines grid displays the transaction lines associated with the invoice. You can select a invoice line to view additional details on the Invoice Line Detail modal page.

Click **Print Invoice** to generate a printable PDF file for the invoice in a separate browser tab.

Note: If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Public Sector Compliance and Regulation.

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12 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:

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

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3. 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

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:
	
	  ○ 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**	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. **Note:** These fields are available only if you select a process frequency of Hourly or minute.
Days	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. **Note:** This field is available only if you select a process frequency of Daily.
Weeks	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.

Page Element	Description
	Note: This field is available only if you select a process frequency of Weekly.
By day	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. 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. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
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:

- On success

- On error

- 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.

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Page Element	Description

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: o Once: Select to run the process one time only. o Hourly or minute: Select to run the process at regular time intervals. o Daily: Select to run the process at regular intervals in days. o Weekly: Select to run the process at regular intervals in weeks. o Monthly: Select to run the process on specific days of the month. o 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**	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. **Note:** These fields are available only if you select a process frequency of Hourly or minute.
Days	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. **Note:** This field is available only if you select a process frequency of Daily.

Page Element	Description
Weeks	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. **Note:** This field is available only if you select a process frequency of Weekly.
By day	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. 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. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
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.

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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:

   - On success
   - On error
   - 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*.

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13 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

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: • Put on Hold • Release Process • Cancel Process
View More Details	Click to view additional information about the process on the Process Details page.

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14 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*.

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15 Using Accessibility Features

Overview of Accessibility

This topic provides an overview of the approach towards accessibility in the Public Sector Compliance and Regulation offerings.

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. • 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.

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Keyboard Shortcut	Description
<SPACEBAR>	Use for: • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
<ENTER>	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
<DOWN ARROW>	Use for: • 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.

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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.

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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.

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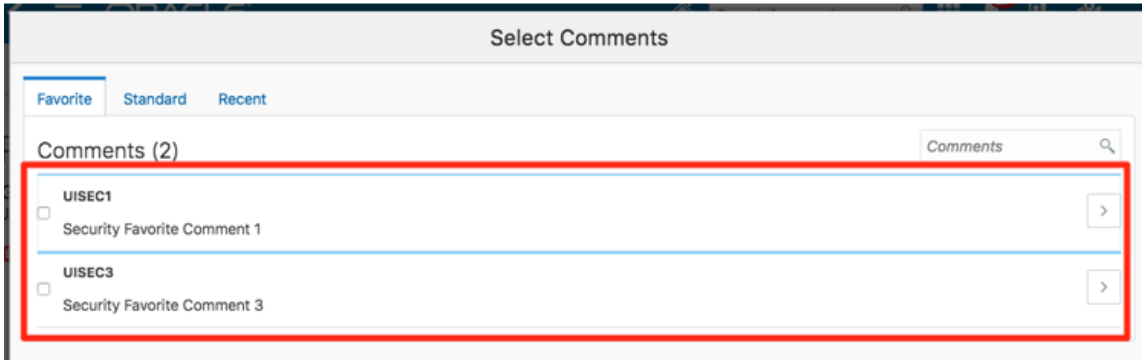
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the 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.
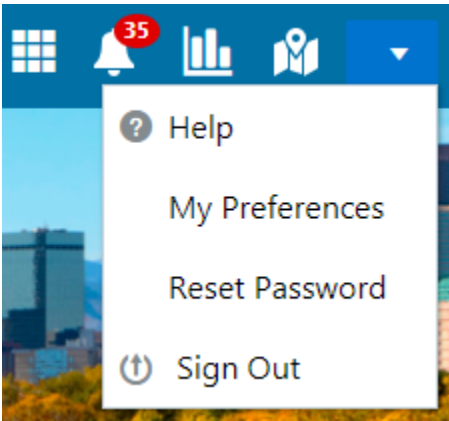
Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

Calendar

This section describes the hot keys you can use when working with the calendar control and date picker to select date field values.

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Auto Number Rule	Electrical Permit	🔍

| * Valid from Date | 7/9/18 | 📅 |

Valid to Date

Public User Enabled

* Department

<   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

Workflow Space Name

Workflow Application ID

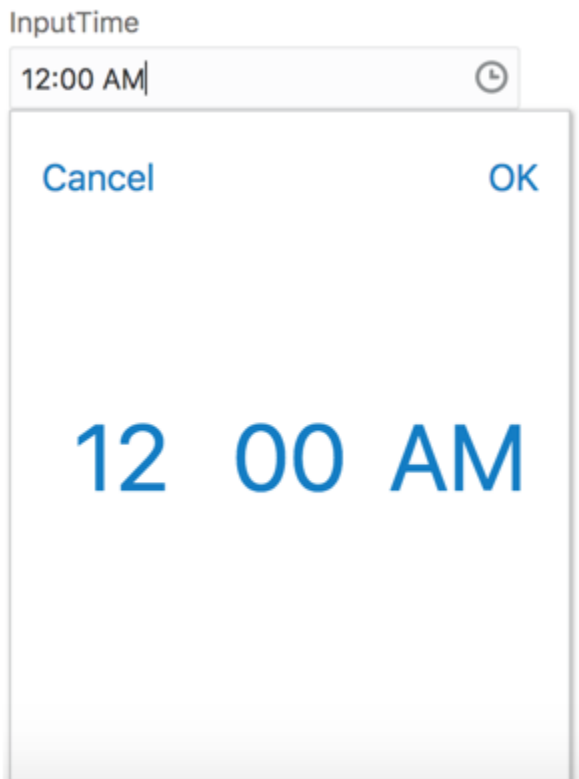| Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calender grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day
	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.

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Target	Key	Description
	Esc	Close the grid.
	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.

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Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker
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.

The following table lists the keyboard options for working with the collapsible headers.

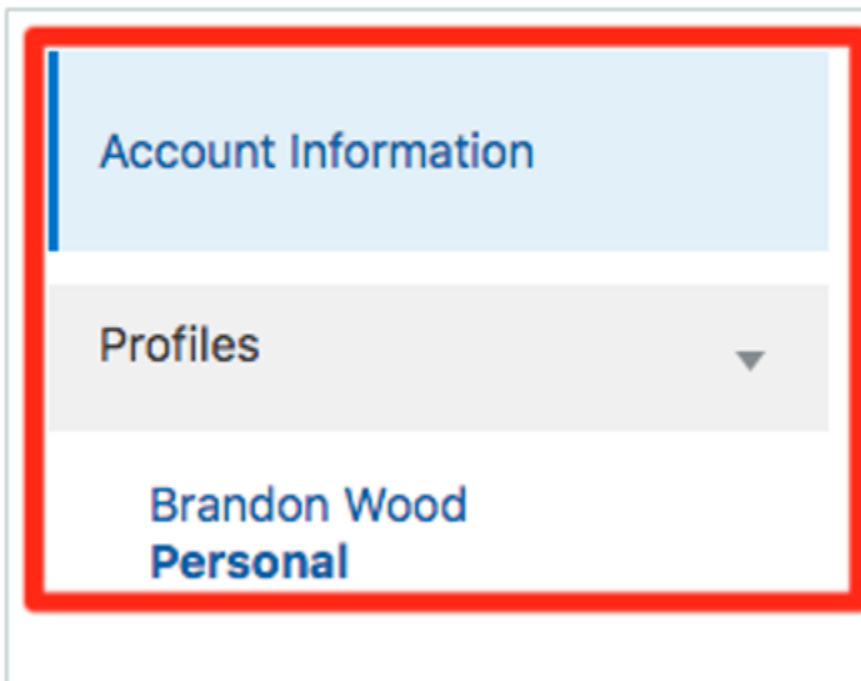| Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift + Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move focus to the previous collapsible header with wrap around.

Key	Description
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.
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.

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.

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Key	Description
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.
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.

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Key	Description
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.
Ctrl + V	Paste the item that are marked to directly before the current item
DELETE	Delete the current item.

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