Oracle Public Sector Compliance and Regulation Cloud

Using Community Development Code Enforcement

January 2020

Contents

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.

Contacting Oracle

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

Access to Oracle Support

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

Comments and Suggestions

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

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1 Managing Public Users

Overview of Public User Accounts and Profiles

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

Accounts Versus Profiles

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

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

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

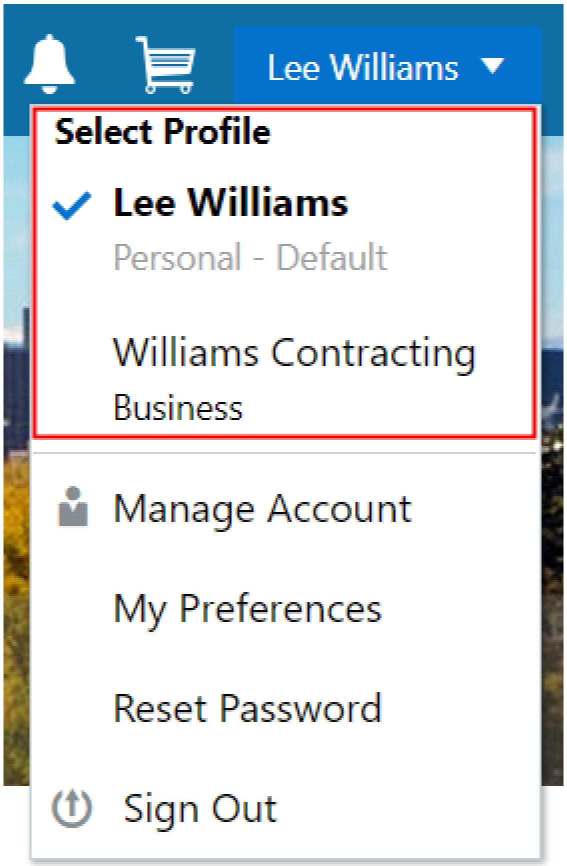
After an account is created, additional profiles can be added. If an account has multiple profiles, any profile can be designated as the default profile. Profiles can be made inactive, but they can't be deleted.

Profile Selection

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

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

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



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

- 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

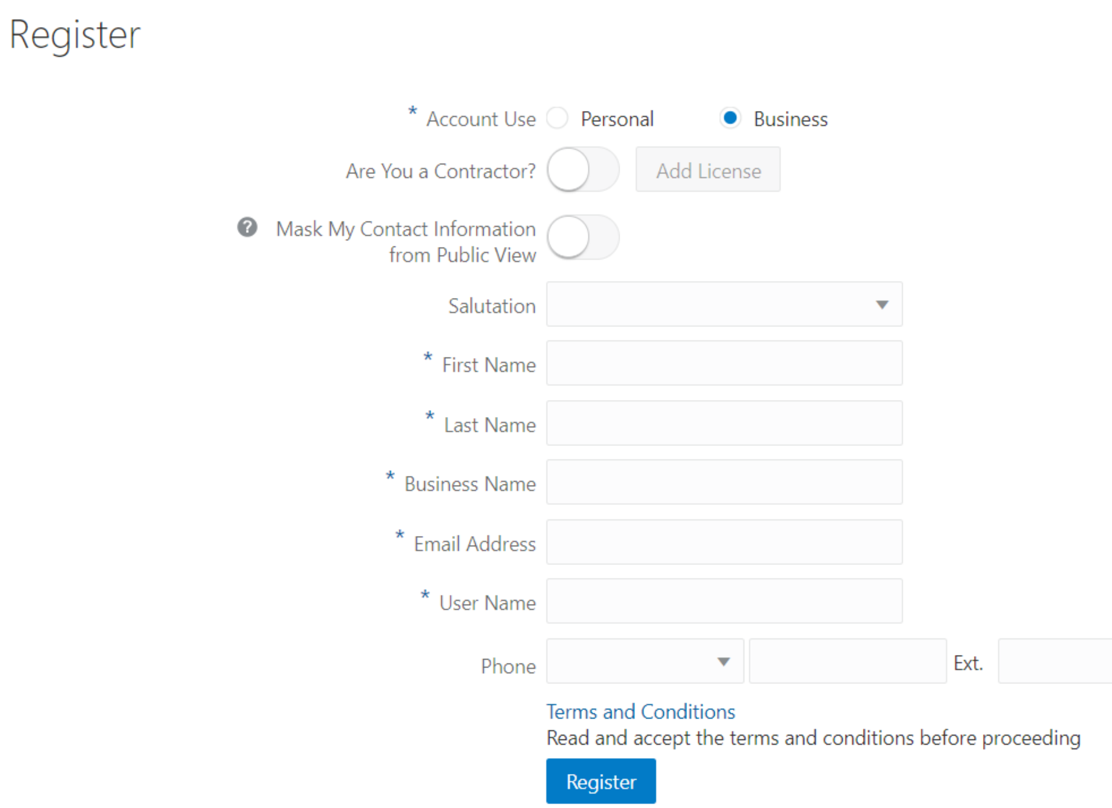
Although anonymous public users can access generic information, users must register before they can create permit applications or planning applications.

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.



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.

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.

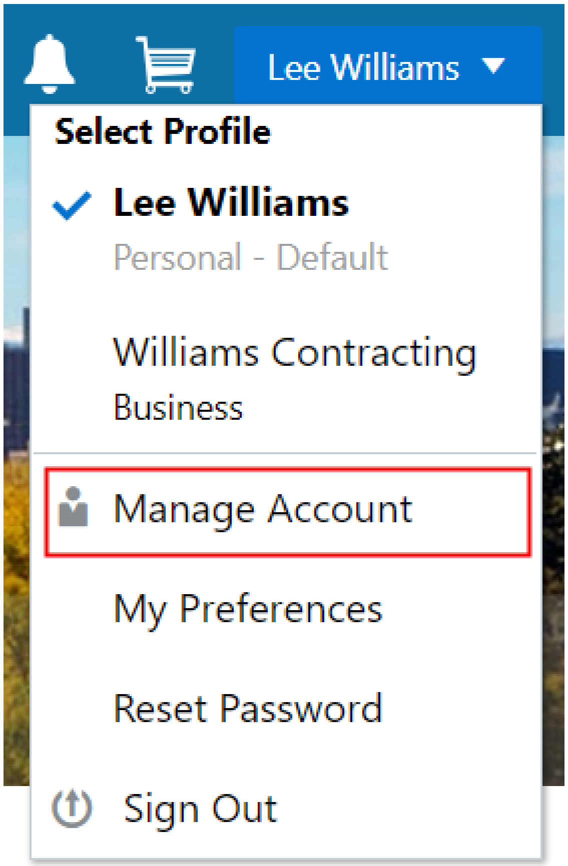
Account Management Navigation for Registered Public Users

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.



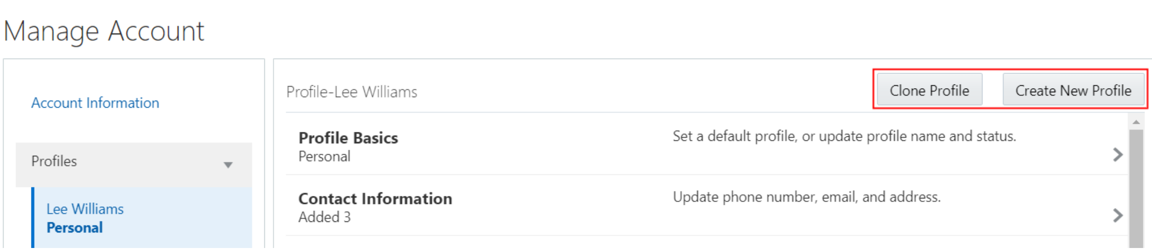
3. Select **Manage Account.**

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.



Creating a New Profile

To create a new profile:

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

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

5. Click **Create.**

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

Cloning a Profile

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

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

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

To clone a profile:

1. Access the Manage Account page.
2. In the left frame of the page, select the profile that you want to clone.
3. Click the **Clone Profile** button.

4. On the Clone Profile page, enter the following basic profile information:

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

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

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

6. Click **Create.**

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

Setting the Default Profile

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

To designate a profile as the default profile:

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

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

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

Managing Public User Accounts

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

Registered public users access the Manage Account page from the 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.

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.

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.

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.

   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.

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.

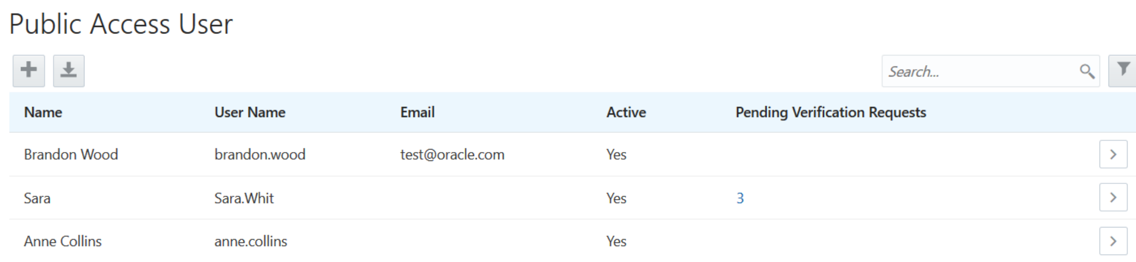
Use the Public User Setup page to configure which types of information require verification. There can be up to three types of information that need to be verified:

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

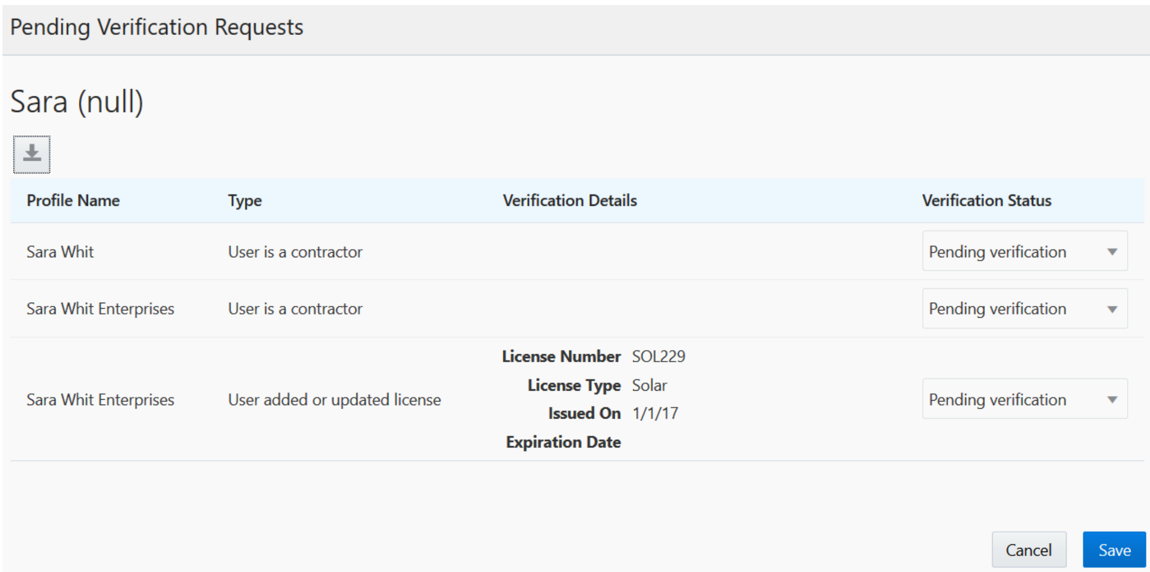
One option for verifying information is to use the Manage Account page. With this option, agency staff can navigate to the various pages that display each type of information, and they can update the verification status on those pages. For more information, see *Managing Public User Accounts*.

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.



This example illustrates the Pending Verification Requests page.



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.

Page Element	Description
Type (type of request)	Explains what type of information must be verified. Values include: ◦ User is a contractor ◦ User added or updated license ◦ 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.

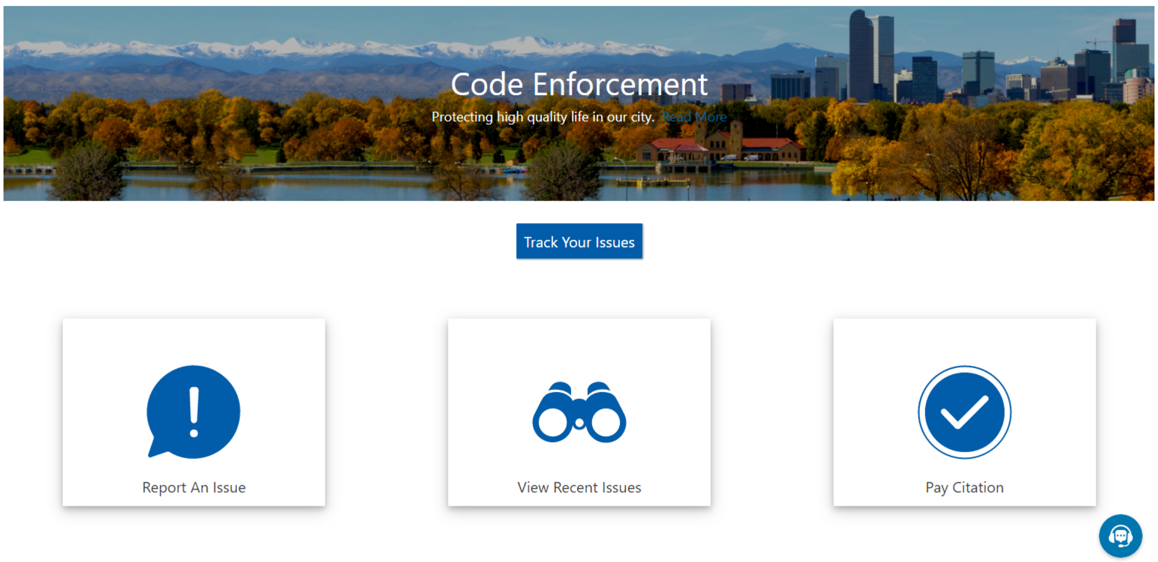
   Select either Verified or Verification failed, depending on whether you were able to verify the information.
6. Click the **Save** button.

2 Code Enforcement Activities for Public Users

The Public User Landing Page for Code Enforcement

The public user landing page for code enforcement is the entry point for public users who want to report an issue, track issues that they reported, see recent issues in the agency's jurisdiction, or pay a citation.

This example illustrates the public user landing page for code enforcement. In this example, a registered public user has signed in.



The banner at the top of the page includes a title and a short message. After the message, a Read More link gives public users access to additional information that you set up.

For information on configuring these elements of the welcome banner, see *Setting Up Agency-Level Options for Code Enforcement*.

On the landing page, public users have access to these actions:

Tile or Button	Who Can Use	Description
Report an Issue	Registered users. Anonymous users can see this tile, but they are prompted to sign in during the issue reporting process.	Report an issue to the agency. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured. See *Reporting Issues*.
Track Issues	Registered users. This button is visible only after the user signs in.	View status and other information about issues that the user reported. See *Tracking Issues*.

Tile or Button	Who Can Use	Description
View Recent Issues	Anonymous and registered users.	View a map with markers that identify the locations of recent issues, or view a searchable list of the issues. See *Viewing Recent Issues*.
Pay Citation	Registered users. Anonymous users are prompted to sign in before starting the payment process.	Make an online payment for a code enforcement citation. See *Paying Citations*.

Reporting Issues

When reporting an issue, a public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.

Here is a summary of the issue reporting process:

1. On the public user landing page, the user clicks the **Report an Issue** tile.

   The Select an Issue Type page appears. It displays tiles for the agency's issue types. Click the small chevron icon in the bottom right corner of a tile to flip the tile over and read a description of the issue type.
2. The user chooses the type of issue:

   a. The user selects an issue type tile.

      The page title changes to the name of the selected issue type (for example, Neighborhood Blight), and the page displays new tiles that represent issue subtypes. Again, the user can flip a tile over to read a description of the issue subtype.
   b. The user selects an issue subtype tile.
3. If the user is not already signed in, they are now prompted to sign in.

   After this point, the user navigates through the remaining steps using **Next** and **Previous** buttons.

   The user can't go back to choose a different issue type or subtype. If the issue wasn't properly classified, the user needs to cancel the report and start again.
4. On the **Provide the Location of the Issue** page, the user identifies the location using a searchable map.

   - A crosshairs icon on the map shows the selected location. If location sharing is active, the user's current location appears by default.
   - The user can search for an address or location, and the map adjusts to place the specified location in the crosshairs.
   - The user can pan and zoom the map to more precisely identify the issue location, and the search bar automatically displays the address or the coordinates of the location in the map crosshairs.

     Sometimes the location on the map is identified using a range such as 100-120 Main Street. The user can update the address manually if necessary.

  - The user can additionally enter additional details about the location such as an apartment number or directions to a specific location at an address.

    This information is optional if there is an address or location coordinates. When there is no address or location coordinates, additional address details are required.
  - If the location is outside of the agency's boundary, a message instructs the user to change the location to one inside the agency's limits.

    The user will not be able to submit an issue with a location that is outside the agency's boundary.
5. The user clicks **Next.**
6. On the **Tell Us What's Going On** page, the user describes the issue and optionally attaches photos, videos, audio files, or other attachments.
7. The user clicks the **Next** button.
8. On the **Just a Few More Questions** page, the user answers any additional questions defined by the agency.

   This step includes a **Priority**switch to indicate the urgency of the issue. Agencies can add additional questions as well.
9. The user clicks **Next.**
10. On the **Provide Contact Information** page, the user verifies their name, email, and phone information or chooses to hide this information.

    Default contact information comes from the user's account. The user can keep these values, modify them, or turn on the **Hide my contact information** switch. Regardless of whether the user hides the information from agency staff, the information is never visible to the public.
11. The user clicks **Next.**
12. On the read-only **Review** page, the user reviews all of the issue information.

    To make changes, the user can click the **Edit** button to make the Review page editable or use the **Previous** icon to return to earlier pages.

    > **Note:** The user can't change the issue type or subtype after continuing past those steps.
13. The user clicks **Submit.**
14. A confirmation message with the issue number appears.

Tracking Issues

Public users can view a list of issues that they reported, and they can see status and other information about the issue.

> **Note:** Although public users see the term issues, the underlying objects are incidents. Even if a case is created based on the incident, the case does not appear in the list of the user's own issues.

To view a list of issues that they reported, public users follow these steps:

1. The user clicks the **Track Your Issues** button on the code enforcement landing page. This button is visible only after the user signs in.

   The Issues page appears.
2. The user reviews the following information for the issues on the list:

Page Element	Description
Issue ID	Displays two rows of information. The incident ID appears in the first row. The incident type and subtype appear in the second row.
Location	Displays the address for the issue.
Description	Displays the original issue description that was supplied by the person who reported the incident.
Status	Displays the incident status. These are the possible incident statuses: ◦ Reported ◦ Inspection ◦ Compliance ◦ Violation ◦ Closed ◦ Duplicate ◦ Void When an incident results in a notice of violation and the creation of a case, the incident status is based on the case status. So even though the public users do not have direct access to case data, the incident status conveys information about the overall status of the issue. Note that incident statuses are less granular than case statuses. For example, if an incident is in Violation status, the corresponding case could be in any of several statuses such as Violation, Mandatory Abatement, or Citation.
Attachments	Displays an attachment icon. Clicking the icon opens a window with a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
Reported Date	Displays the date that the issue was originally submitted.

3. To view details for a specific issue, the user clicks the issue to access the Issues page.

   The Issues page has these sections:

   - A map that displays the issue location.
   - A Details section that shows the issue address, description, and priority. If the person who reported the issue supplied their name, email, and phone, then that information also appears.
   - An Attachments section that displays a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.

4. To return to the issues list, the user clicks the **Back** icon in the header.

Viewing Recent Issues

Any public user, including anonymous users. can view your agency's recent issues using the View Recent Issues tile on the code enforcement landing page. Users can view the issues on a map or in a list. Your agency defines which issues appear on the map.

Overview of Recent Issues

The recent issues that are visible to the public are cases, which represent verified violations. Incidents are not visible to the general public.

To define which cases appear on the View Recent Issues page, agencies use the Code Enforcement Options page to define the period that is considered "recent." They also choose whether to show all cases that were reported within that time period or only cases that are still active.

Viewing Recent Issues

To view recent issues, public users follow these steps:

1. On the code enforcement landing page, the public user clicks the **View Recent Issues** tile.

   The View Recent Issues page appears in map view.
2. The user can employ the search, zoom, and pan functionality of the map to show a specific area.

   An address search bar appears in one corner of the map. This search centers the map on the specified location and shows markers for all issues in the display area.

   A case number search field appears above the map. This search shows issue markers for any cases that match the search criteria and hides all other markers. Note that users cannot search using an incident ID, only a case ID.
3. Review the issues markers on the map.

   Colored markers identify issue locations. A number on a marker represents the number of issues for that specific location. Markers without numbers have just one issue.

   When the zoom level would normally cause location markers to overlap, the markers for the individual locations are combined into a cluster marker. Clusters appear as double circles, with a dark center and a lighter border. The number on the cluster marker represents the total number of issues for the included locations. As the user zooms in closer, individual location markers replace the cluster marker.

   For more information, see *Viewing Map Markers*.
4. To view issue details, the user clicks an issue marker to open a pop-up panel with more information:
   - The issue ID (case ID) and the status appear in bold.
   - The issue description, reported date, and location also appear.
   - If the location has multiple issues, the user can see how many issues exists and which one is currently visible—for example, 1 of 3. **Previous** and **Next** controls enable the user to page through the issues.
   - A **Zoom To** link zooms the map while keeping the issue centered.

5. To toggle between the map view and a list view, the user clicks the **List View** and **Map View** icons.

   The list displays the same information about each issue. It additionally displays the issue type and subtype.

Paying Citations

The code enforcement landing page for public users includes an option for paying citations.

> **Note:** The person paying the citation must be a registered user. For information on user registration, see*The Public User Registration Process*.

To pay a citation, a public user follows these steps:

1. On the code enforcement landing page, the user clicks the **Pay a Citation** tile.
2. The user signs in if prompted.
3. On the Pay Citation page, the user enters the citation ID and clicks the **Search** icon.

   Citation information, including the amount and the due date, appear on the page.
4. The user clicks the **Pay** button.
5. On the **Checkout** page, the user chooses a payment method and clicks the **Make Payment** button.
6. The user follow the instructions for the chosen payment method.

3 Overview of Working With Incidents And Cases

Using the Agency Springboard

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

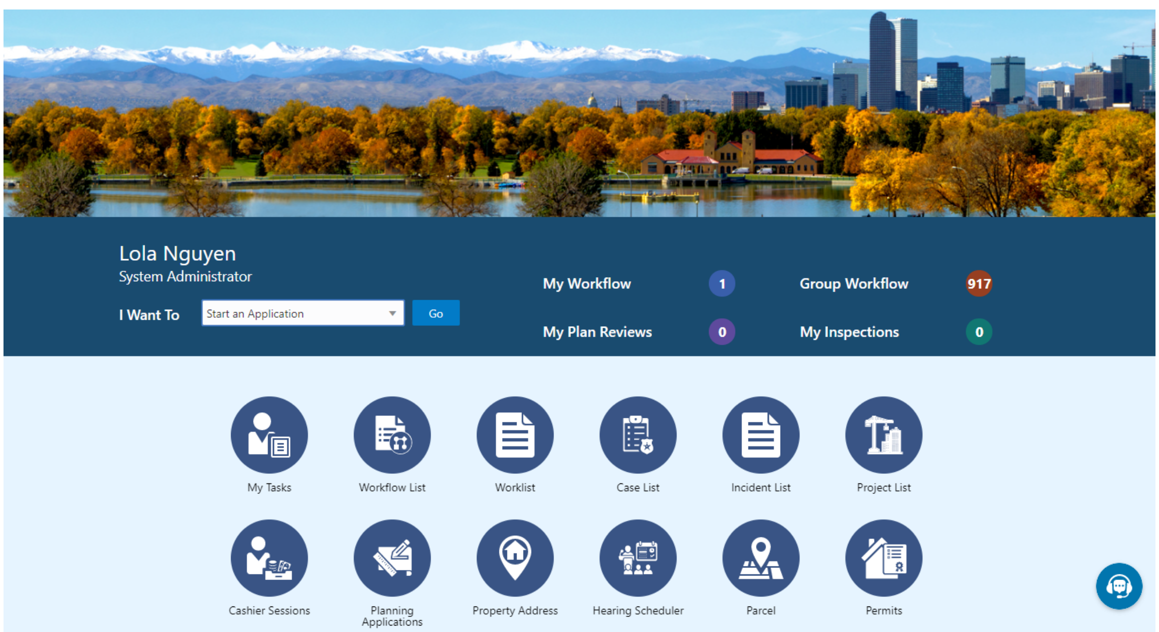
The Agency Springboard offers access to task lists and specific pages based on the staff role in the agency, from supervisors and accounting staff to permit technicians and inspectors.

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.



<table>
<tr><th>Page Element</th><th>Description</th></tr>
<tr><td>Global Banner</td><td>The global banner appears as the page header with functionality that might include some or all of these elements:
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.</td></tr>
<tr><td>Alerts</td><td>Alerts are displayed as a banner that broadcasts messages with important information. These alerts are configured by the agency administrators.</td></tr>
<tr><td>Quick Actions (I Want To)</td><td>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.</td></tr>
<tr><td>Task Lists</td><td>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.</td></tr>
<tr><td>Tiles</td><td>Tiles appear in the springboard section as icons with links to the pages you use to administer specific types of transactions.</td></tr>
</table>

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

The Issue Lifecycle

Code enforcement provides a process for tracking, evaluating, and managing possible code violations in your jurisdiction. After an issue is reported, it goes through a defined process where agency staff processes the initial incident and, if a violation is found during the initial inspection, a case is created to enable agency staff to manage the issue until it is resolved.

Incidents, Cases, and Issues

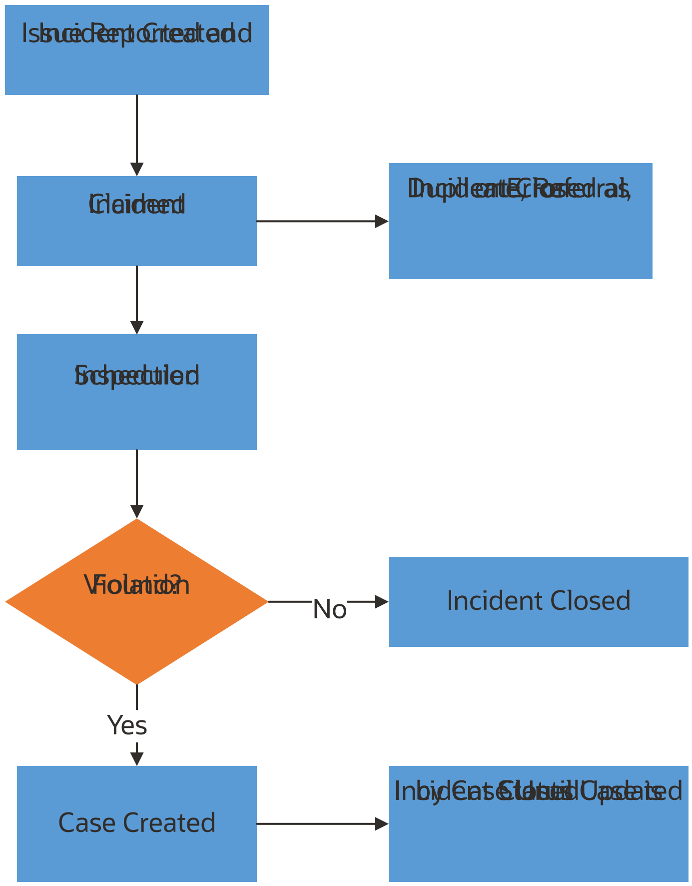
This table explains the different terms that apply to a reported problem.

Term	Definition
Incident	When an problem is reported, the system object that corresponds to the report is an Incident. If several people report the same problem, there can be multiple incidents for the problem. Code technicians claim incoming incidents and process them using a fixed set of possible actions. A technician can close the incident, mark it as a duplicate, assign it to a different technician, or schedule an inspection so that a code enforcement officer can determine if a code violation exists.
Case	If an incident is determined to be a code violation, a case is created. The case is the tracking mechanism for all violation-related activity such as sending a notice of violation, issuing a citation, tracking fees and payments, or managing an appeal.
Issue	Issue is a general term for a problem that is entered into the code enforcement system. It refers to both incidents and cases. An issue is not a system object. Public user pages always use the term Issue because public users don’t need to distinguish between incidents and cases. Agency-facing pages use the term Issue in limited situations where incidents and cases appear together.

Incident and Case Process Flow

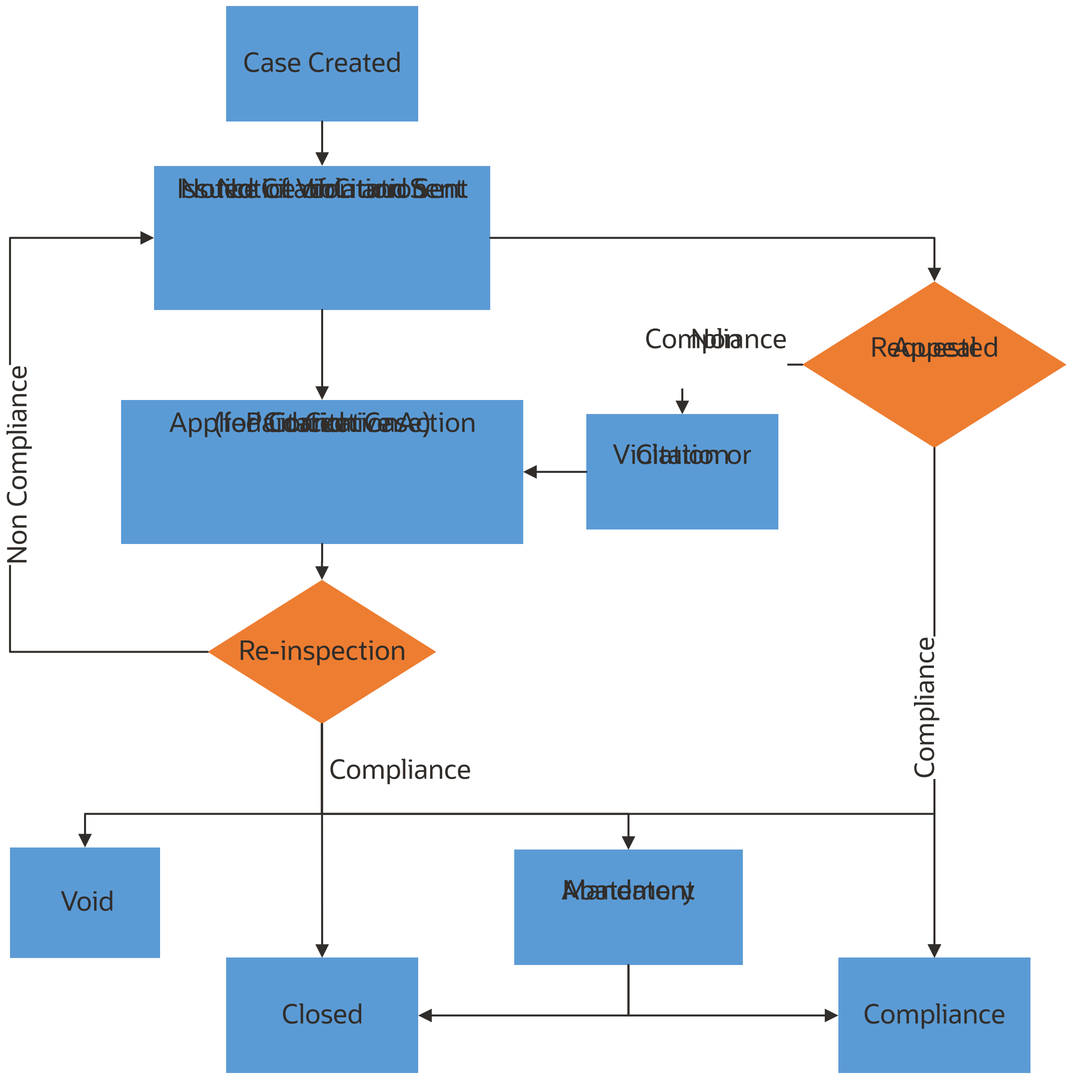
Incidents and cases have their own distinct process flows as illustrated below. Not all issues go through all of these events, but the diagrams provide a general outline of the issue lifecycle.

This diagram illustrates the lifecycle of an incident. A technician claims an incoming incident and either schedules an inspection or closes the incident as a duplicate, a referral to another department or agency, or an error. For incidents that get an inspection, a case is created only if a violation is found. Otherwise the incident is closed. After a case is created, all additional activity occurs in the case. The system updates the incident status to reflect case activity, but users no longer interact with the incident.



The events in the case lifecycle are illustrated below, although not all cases go through all of these events:

This diagram illustrates the lifecycle of a case.



Time Rules and the Issue Lifecycle

Time rules calculate due dates for specific events based on a trigger date and the issue priority. For events such as inspections that can occur multiple times, the amount of time until the due date can also be based on the occurrence count of the process (first inspection, second inspection, and so forth). An issue subtype definition includes a complete set of time rules, and Issues inherit the rules from the issue subtype.

For more information about setting up time rules, see *Setting Up Time Rules*.

Reporting an Issue

The code enforcement landing page for public users provides the entry point for members of the public to report issues.

Only registered users can report issues. A user who begins reporting an issue without signing in is prompted to sign in before entering any issue details. Depending on the agency's configuration, users may be allowed to choose whether the issue includes their name and contact information.

Users start an issue report by choosing the general type of problem and then a more specific type of problem. The agency defines these categories by creating issue types and issue subtypes.

Users also provide the issue location, a description, and optional attachments such as photos or videos. Agencies can also add their own questions to collect additional information.

Submitting an issue report creates a new incident and uses the agency's time rules to calculate the due date for reviewing the incident.

For more information about issue reporting, see *Reporting Issues*.

Claiming an Incident

Code enforcement technicians are responsible for the initial review and processing of incidents.

Technicians use the worklist to view a list of incoming incidents. The main Incoming Incidents tab shows all unassigned incidents. This tab has subtabs for viewing overdue incidents and incidents that are marked as a priority.

From the worklist, technicians use the Claim action to assign themselves to the incident. The technician who is assigned to the incident is then responsible for reviewing and processing it before the incident review due date.

Claiming an incident removes it from the Incoming Incident worklist tab and adds it to the Incidents tab, where technicians can take further action on their assigned incidents.

For more information about claiming incidents, see *Reviewing and Claiming Incidents*.

Reviewing and Processing an Incident

Technicians use the worklist to view their assigned incidents. The main Incidents tab shows all incidents assigned to the current user. This tab has subtabs for viewing overdue incidents and incidents that are marked as a priority.

Technicians have four options for processing incidents:

- Schedule an inspection to determine if a violation has occurred.

  The technician chooses a date and a code enforcement officer for the inspection.
- Mark the incident as a duplicate of either another incident or a case.

  Technicians can search existing incidents and cases to see if the issue was already reported.
- Close the incident and provide a reason.

  Incidents are closed when they are invalid or when they are referred to another agency to handle the issue.
- Reassign the incident to a different technician.

For more information about the actions that a technician can take, see *Processing Incidents*.

Inspecting the Incident

A mobile inspector visits the location that is related to the assigned incident inspection. The officer completes the inspection by submitting a result on the mobile device, choosing from the four options:

- Mark the incident as in compliance, which closes the inspection.
- Mark the incident as in violation, which creates a case with a status of Violation. A notice of violation is sent to the responsible party and a re-inspection is scheduled. The notice lists the various code references associated with the violation. It also lists the corrective actions.
- Refer the incident to another agency to handle the issue, which closes the inspection.
- Close the incident if it is invalid.

For more information about mobile inspections, see *Oracle Municipal Code Officer Overview*.

Creating a Case

A case is created when an incident inspection results in violation.

As a code technician, you manage the case activity using a collection of case detail pages that consolidates all aspects of a case:

- Property information, responsible parties, and case history are recorded and managed.
- Recorded inspection activity is tracked and new inspections are scheduled.
- A notice object is created, which the technician uses to generate a notice.
- Code References are updated.
- Comments and attachments are reviewed.
- Any appeal requests and their hearings are tracked.
- Citations are issued and their fees and payments are tracked.

Note: Agency staff can create a case directly, when a violation is found. There is no need for agency staff to create an incident using the issue reporting process.

For more information about case details, see *Processing Cases*.

Issuing a Notice of Violation

A code technician is responsible for generating a notice and dispatching it to the party responsible for the violation. You can access the worklist or the case detail pages to work with notices. The following information is available on the Notice of Violation page, which can be updated before generating the notice:

- Compliance date.
- Issue description.
- Responsible party and mailing address.
- Code references.

  The notices page on the worklist allows you to delete code references. Code technicians can add code references from case detail pages.

The notice of violation is printed and sent to the responsible party. A copy of the notice is attached to the notice record.

For more information about notices, see *Working with Notices*.

Issuing a Notice of Citation

Code officers and code technicians can issue citations based on the inspection result and the time rules set up.

A code technician is responsible for generating a notice of citation and dispatching it to the party responsible for the violation. The details of the citation fees and payments are recorded in a separate fees and payments page.

The following information is available on the Notice of Citation page, which can be updated before generating the notice:

- Compliance date.
- Issue description.
- Due date for citation fee payment.
- Responsible party and mailing address.
- Code references.

  The notices page on the worklist allows you to delete code references. Code technicians can add code references from case detail pages.

The notice of citation, which contains the fee component, is printed and sent to the responsible party. A copy of the notice is attached to the notice record.

For more information about citations, see *Working with Citations*.

Managing Appeals

Agency staff can act on behalf of the responsible party to request an appeal for a violation or citation that the responsible party is associated with.

Code technicians manage activity related to appeals and hearings in the case detail pages by accessing the **Case list**:

- Request appeal.
- Schedule hearing.
- Update hearing decision.

The status of the case changes based on the hearing decision.

For more information about appeals, see *Working with Appeals and Hearings*.

Paying a Citation

The code enforcement landing page for public users includes an option for paying citations. The person paying the citation must register and sign in first.

To pay a citation, the user enters the citation ID and follows the guided payment process.

For more information about the payment process, see *Paying Citations*.

Using the Worklist

The code enforcement worklist provides a central location for performing code enforcement tasks. Various tabs list incidents or cases based on where they are in their lifecycle, and action menus provide quick access to the tasks that can be performed at each stage.

Access the worklist by clicking the **Worklist** tile on the agency springboard. Initially all tabs to which you have access appear. Click a tab to see the incidents or cases that meet the tab filter criteria and to access the relevant actions.

Some tabs have subtabs that further filter the incidents or cases. Subtab action menus have the same actions as the parent tabs.

When you click a tab other than the one that is initially selected, only the newly selected tab and any associated subtabs are visible. Similarly, when you select a subtab, only that subtab is visible. To return from a subtab to its parent, or from a main tab to the default view where all tabs are visible, click the **Back to Incoming Incidents** icon next to the Search icon.

The worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Incoming Incidents	Unclaimed incidents. These are incidents in Reported status that do not have an assigned technician.	Claim	Claiming an incident assigns the current user as the technician for the incident. Claiming also removes the incident from this tab. The **Overdue** subtab shows unclaimed incidents with a due date before the current date. The **Priority** subtab shows unclaimed incidents where the **Priority** switch is enabled.
Incidents	Unprocessed incidents (those in Reported status) where the current user is the assigned technician.	• Schedule Inspection • Check for Duplicate • Reassign Incident • Close Incident	The actions that are available here are also available from the incident detail page. Completing any of the available actions removes the incident from this tab. The **Overdue** subtab shows claimed incidents with a due date before the current date. The **Priority** subtab shows claimed incidents where the **Priority** switch is enabled.
Notice of Violation	Violation notice object records created for code violations.	• Generate • Continue	The Generate action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page and complete the details and print. The Continue action signifies that the notice is generated, and you

Tab	Displays	Available Actions	Additional Information
			can make changes to the details before printing it. Any changes made to the notice process will automatically update the case detail pages.
Notice of Citation	Citation notice object records created for code violations.	• Generate • Continue	A citation notice also contains information about the citation fees.
Appeals	Cases that have requested appeals in Scheduled status.	• Reschedule • Update	
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	Claim	
Cases	All active cases assigned to the logged in technician.	Update Status	Once the status of a case changes to Compliance, it is removed from the list.

4 Managing Incidents

Reviewing and Claiming Incidents

When an issue is reported, an incident is created. Code enforcement technicians use the worklist to claim incoming incidents. The technician who claims the incident is responsible for processing it.

For more information about the code enforcement worklist, see *Using the Worklist*.

To claim an incident:

1. From the agency springboard, click the **Worklist** tile.
   The **Incoming Incidents** tab appears by default. This tab displays all unclaimed incidents.
2. Optionally select a subtab to further filter the list of incoming incidents:
   - Click the **Overdue** tab to display unclaimed incidents with a due date before the current date.
   - Click the **Priority** tab to display unclaimed incidents with a priority setting of Yes.

   To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.
3. Review the following summary information about the incident:

Page Element	Description
 **Overdue**	This icon appears if the incident due date is before the current date.
Incident	This column displays: ◦ The incident ID that is assigned based on the agency's autonumbering rules. ◦ The incident type and subtype, separated by a hyphen. ◦ The incident status. Unclaimed incidents have a status of Reported.
Location	Displays the incident address.
Issue	Displays the incident description.
Reported Date	Displays the date that the incident was created.
Due By	Displays the date by which the review and processing must be complete. To complete the processing, the technician who claims the incident uses the actions that are available for claimed incidents.

Page Element	Description
	Actions that complete the review include scheduling an inspection, marking the incident as a duplicate, or referring the incident to another department or agency. (The other available action, reassigning the incident, does not complete the review.) The due date is calculated based on your agency's rules and the date that the incident was submitted.

4. If necessary, review the complete details for the incident.
    a. Click the **View More Details** icon to access the Incident page.
    b. On the Incident page, review the information on the Overview, Details, Comments, and Attachments tabs.

       For more information about the Incident detail page, see *Working With Incident Details*.
    c. Click the **Back** icon in the banner at the top of the page to return to the worklist, and re-navigate to the desired worklist tab.
5. Click the **Claim** button to claim the incident.

   Claiming an incident makes you the assigned technician. As the assigned technician, you are now responsible for processing the incident.

Processing Incidents

The code enforcement technician who claims an incident has four options for processing it: scheduling an inspection, marking it as a duplicate, reassigning it to another technician, or closing it.

Code enforcement technicians access the four processing options from an **Actions** menu. This menu appears on the **Incidents** tab of the worklist, which lists incidents where the current user is the assigned technician. It's also available on the **Overview** section of the Incident detail page. See *Working With Incident Details*.

> **Note:** The **Incident** tab displays the same incident information as the other incident-related tabs. For descriptions of these fields, see *Reviewing and Claiming Incidents*.

Accessing Incident Actions from the Worklist

To access the **Actions** menu for an incident in the worklist:

1. From the agency springboard, click the **Worklist** tile.
2. Select the **Incidents** worklist tab to view incidents in Reported status where you are the assigned technician.

   Do not use the **Incoming Incidents**tab or its subtabs. These display only incidents without an assigned technician, so the **Actions** menu is not available.
3. Optionally select a subtab to further filter the list of incoming incidents:
    - Click the **Overdue** tab to display incidents with a due date before the current date.
    - Click the **Priority** tab to display incidents with a priority setting of Yes.

To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.

4. Click the **Actions** icon for an incident.

   A drop-down list of actions appears.

Accessing Incident Actions from the Incident Details

To access the **Actions** menu on the Incident details page:

1. Click the **Incident List** tile on the agency springboard.
2. Click the row for a specific incident.

   The Incident page opens and displays details for the selected incident.
3. In the Overview section of the page, click the **Actions** button.

   A drop-down list of actions appears.

Scheduling an Inspection

If the technician who reviews an incident determines that it is a valid incident, the next step is to schedule an inspection.

To schedule an inspection:

1. Access the **Actions** menu for an incident.
2. Select **Schedule Inspection** from the menu.

   The Schedule an Inspection window opens.
3. Review the following read-only fields for contextual information:

Page Element	Description
Priority	Indicates whether the incident has been marked as high priority. The incident priority can affect the due date calculation.
Due Date	Displays the date by which the inspection should be completed. The inspection due date is determined by the time-based rules for the associated issue subtype. These rules are based on the incident submission date and the incident priority.

4. Accept the default **Inspection Date,** or enter a new one.

   The default inspection date is the inspection due date.
5. Review any existing comments.

   Existing comments display the date and time the comment was created, the user ID of the person who added the comment, and the first 200 characters of the comment text. If any comments are truncated, click the comment to open a window that displays the entire comment. A comments search box is available if any comments exist.
6. Optionally add additional comments:

   a. Click **Add Comment.**

   b. In the Add Comment window, enter your comment in the rich text field.

      Alternatively, insert a copy of an existing comment by clicking **Select Comments.** For more information about working with comments, see *Working with Comments*.

   c. Click **Save** to close the Add Comment window and return to the Schedule an Inspection window.

      Even if you cancel the Schedule an Inspection action, the new comment remains.

7. Select an inspector from the list in the **Assign** section.

   The list displays the **Name** of each inspector who is available on the inspection date. The **Inspection Count** for an inspector indicates how many inspections that person is already scheduled to perform on the specified date.

   If no inspectors are available, change the inspection date.

8. Click **Save** to schedule the inspection on the selected date with the selected inspector.

   The inspection is scheduled, and the incident status changes to **Inspection.**

   After you schedule an inspection, the incident no longer appears on the **Incidents** worklist tab. You can still access the incident from the incident list and incident details pages. See *Working With Incident Details*.

Checking for Duplicates and Marking an Incident as a Duplicate

To check for duplicates and mark an incident as a duplicate:

1. Access the **Actions** menu for an incident.
2. Select **Mark as Duplicate** from the menu.

   The Check for Duplicate window opens. The **Selected Incident** section at the top of the window displays the incident ID, issue type, issue subtype, and address for the incident that you are marking as a duplicate.

3. Click the **Cases** and **Incidents** links to view initial lists of possible duplicates

   The search that is performed when you open the page shows active incidents and cases that match the issue subtype and location of the selected incident. Cases and incidents appear in separate lists that appear when you click the corresponding links.

   The search results show the case or incident ID, the issue type and subtype, the status, the address, and the reported date.

4. Optionally enter your own search criteria and click **Search** to look for other cases or incidents that the selected incident duplicates.
5. Select the check box for an incident or case that the selected incident duplicates.
6. Click **Mark as Duplicate,** then click **OK** in the confirmation message window.

   The original incident status changes to **Closed,** and the related issue information is saved. If you access the Incident detail page for the original incident, you can see the related issue ID.

   After you mark an incident as a duplicate, it no longer appears on the **Incidents** worklist tab. You can still access the incident from the incident list and incident details pages. See *Working With Incident Details*.

Reassigning an Incident to Another Technician

> **Note:** Reassigning an incident assigns the incident to a new technician, who is then responsible for reviewing and processing the incident. Reassigning does not assign the incident to a code enforcement officer who will perform an inspection. To assign an incident for inspection, use the Schedule an Inspection option.

To reassign an incident to another technician:

1. Access the **Actions** menu for an incident.
2. Select **Reassign** from the menu.
   The Reassign window opens. The name of the **Current Assignee** appears at the top of the page.
3. Select a new technician from the **Name** list.
   This list shows people who have the code enforcement technician role.
4. Click the **Save** button.
   After you reassign an incident, only the newly assigned technician sees the incident on **Incidents** worklist tab.

Closing an Incident

Sometimes an incident can be closed immediately, without first being inspected.

To close an incident:

1. Access the **Actions** menu for an incident.
2. Select **Close** from the menu.
   The Close Incident window opens.
3. In the **Close Reason** field, select one of the following reasons:

Value	Description
Error	The incident was created in error.
Referral	The incident has been referred to another department or agency.
Not Appropriate	The original report was not appropriate.

4. Review any existing comments, and optionally add additional comments.
   To add new comments:
   a. Click **Add Comment.**
   b. In the Add Comment window, enter your comment in the rich text field.
      Alternatively, insert a copy of an existing comment by clicking **Select Comments.** For more information about working with comments, see *Working with Comments*.
   c. Click **Save** to close the Add Comment window and return to the Close Incident window.
      Even if you cancel the Close Incident action, the new comment remains.
5. Click **Save.**
   The incident status changes to **Closed.**
   After you close the incident, it no longer appears on the **Incidents** worklist tab. You can still access the incident from the incident list and incident details pages. See *Working With Incident Details*.

Working With Incident Details

The Incident page includes sections for the incident overview, details, comments, and attachments. The page also displays a map with the incident location. Use this page to view and update incident information, to assign the incident, and to perform the actions for processing the incident.

Accessing Incident Details

To access incident details from the Worklist:

1. Click the **Worklist** tile on the agency springboard.
2. Access a tab that displays the incident you want to access, and locate the incident in the list.
3. Click the **View More Details** icon for the incident.

To access incident details from the Incidents list:

1. Click the **Incidents** tile on the agency springboard.
2. On the Incidents list page, locate the incident and click it.

Using the Incident Overview Tab

The **Overview** tab on the Incident page displays summary information, enables you to update assignments, and provides access to the same actions that you can perform from the Worklist page.

To use the Overview tab:

1. Access the incident.

   The Incident page appears and displays the Overview tab.
2. Review the following read-only information:

Page Element	Description
Status	Displays the current status of the incident.
Related Issue	Appears only if the incident was closed as a duplicate. Displays the issue ID of the issue that the current incident duplicates.
Issue Description	Displays a description of the problem that was reported.
Issue Location	Displays the location of the incident. This can include an address and any additional location information that was provided.
Reported Date	Displays the date that the incident was originally submitted.

Page Element	Description
Review Due Date	Displays the due date for the initial incident review that the code technician performs. This is the date by which the technician must close the incident or schedule an inspection. (This is different from the date by which the inspection must be performed.) The review due date is calculated based on the issue subtype, the date the incident was submitted, and the incident priority.

3. Review and, if necessary, update the incident assignments using these fields:

Page Element	Description
Technician Assigned	Identify the code enforcement technician who is responsible for the initial review and processing for the incident.
Inspector Assigned	Identify the code enforcement officer who is responsible for an initial inspection. An inspector is assigned when the inspection is scheduled.

4. Use the **Actions** menu to perform any of the following actions:

Action	Description
Schedule Inspection	Select the inspection date and the inspector for an incident.
Mark as Duplicate	Identify another issue (an incident or a case) that this incident duplicates. Incidents that are marked as duplicates are closed, and the ID of the related issue appears on the Overview tab.
Reassign	Choose a new code enforcement technician. This action has the same result as directly editing the **Technician Assigned** tab.
Close	Close the incident and specify a reason for the closure.

> **Note:** These are the same actions that code enforcement technicians perform from the worklist. For more information, see *Processing Incidents*.

Using the Incident Details Tab

The **Detail** tab on the Incident page displays read-only information from the original issue report. This information can't be updated after the incident is created.

To use the Details tab:

1. Access the incident.
2. Click **Details.**
3. Review the following read-only information:

Page Element	Description
Address	Displays the location of the incident. This can include an address and any additional location information that was provided.
Issue Description	Displays the description of the problem that was reported.
<User-defined fields>	Displays any user-defined fields from the intake form.
Name, Email, and **Phone**	Displays contact information for the person who reported the incident. If your agency allows public users to hide their information when reporting an issue, these fields can be blank.

Working With Incident Comments

The **Comments** tab on the Incident page enables you to add comments using the same comments tool that you use for adding case comments. For detailed information on adding comments, see *Working with Comments*.

Viewing Incident Attachments

The **Attachment** tab lists the file attachments that were uploaded as part of the original incident report.

To view incident attachments:

1. Access the incident.
2. Click **Attachment.**
3. Review information for the attachments in the list:

   Attachment information is not labeled, but it consists of the following:
   - A thumbnail showing an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
   - File name
   - File size
   - File description, if one was entered when the file was uploaded.
   - Date and time that the attachment was uploaded.
4. To view additional details or update the description:
   a. Click the **Actions** icon for the row and select **View Details** from the menu.
   b. Review information in these fields: **File Name, File Size, Uploaded By,** and **Uploaded On.**
   c. Review and optionally modify the **Description.**

   d. Click **Cancel** or, if you updated the description, click **Save**

5. To download a local copy of the file, click the **Actions** icon for the row and select **Download** from the menu.

   The download process is based on your browser. If you're not prompted for a file location, the file is saved to your downloads folder.

6. To remove the attachment from the incident, click the **Actions** icon for the row and select **Delete** from the menu.

5 Using Oracle Municipal Code Officer

Oracle Municipal Code Officer Overview

Use the Oracle Municipal Code Officer mobile application to manage a variety of code enforcement inspections on a daily basis.

Oracle Municipal Code Officer 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 Municipal Code Officer 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 Municipal Code Officer*.

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

Viewing the Worklist

As a code enforcement officer, you start on the Worklist page when you log into Oracle Municipal Code Officer. On the Worklist page, you can:

- View the inspection job list. Inspections are categorized in tabs and each listed with a count of inspections: All inspections, inspections for the current day, next day, first, current week, overdue, re-inspections, and completed inspections.
- Sort the inspections by due date, scheduled date, issue subtype, priority, and address of the location under inspection.
- View the status of the incident.
- View the inspections in a map view.
- Record a new violation.
- Reschedule inspections.
- Add attachments and comments.

> **Note:** You can access the Attachments, Comments, and Reschedule options by swiping to the left on an inspection item or by selecting the **Action** menu on the inspection item.

Opening the Map View

Use the map icon on the Worklist page to open a map view and view the locations of the scheduled inspections.

The above interactive map allows you to view the details of an inspection by clicking an inspection location, which is represented as a red dot. A modal window shows the details of the inspection such as the status and the location address. Click the **View More Details** icon to access the Inspection page and view the complete detail of the selected inspection.

You can select the **List View** button to return to the list view of your inspections.

Working with Inspection Details

Access the Inspection page by selecting an inspection item on the Worlist page. On the Inspection page you view the code enforcement inspection details:

- Inspection count (configured by the administrator on the Inspection Count page).
- Inspection identifier.
- Status.
- Location.
- Description.
- Inspection due date.
- Compliance date.
- Code references.
- List of all previous inspections.

On the Inspection page you can initiate actions such as:

Page Element	Description
New Violation	Select the option from the **Action** menu to report a new violation. See the **Reporting a New Violation** section for more details.
Result Inspection	Select to list the result options to choose from. Examples include **In Compliance**, **Remains in Violation** among others. The options available are based on the status of the incident. See the **Submitting Inspection Results** section for more details.
Attachments	Select to open the Attachments page to view a list of attachments related to the inspection. You can add a new attachment by selecting the **Add** button.
Comments	Select to open the Comments page to view a list of comments related to the inspection. You can include an existing comment from standard comments or add a new comment by selecting the **Add Comment** button.

You can also access the New Violation option from the Worklist page by selecting the **Action** menu available at the top. To access the Attachments, Comments, and Reschedule options for an inspection on the Worklist page, swipe the screen to the left on the inspection row or simply select the **Action** menu.

Reporting a New Violation

Code enforcement officers such as an inspector can directly report new violations, which are not part of any assigned incident or case.

To report a new violation, complete the new violation form and submit:

1. On the Worklist page click the **Action** menu and select **New Violation**.

You can also access the New Violation button from the **Action** menu on the Inspection page.
2. Select the type and subtype of the issue you want to report.
3. Use the map page to locate the property for which you are reporting the violation.
4. Enter a description of the issue. You can also attach a photo, video, or an audio file as reference.
5. Enter any additional information, if present.
6. Select one or more code references from a list of current or other violations.
7. Review the details and submit the form.

Note: The fields on the new violation reporting form are configured by the agency administrator.

Rescheduling an Inspection

You reschedule an inspection assigned to you using the Reschedule page. To reschedule an inspection:

1. On the Worklist page click the **Action** menu on the inspection you want to reschedule.
   You can also swipe the screen to the left on the inspection item.
2. Select **Reschedule**.
3. The Reschedule page displays the due date and the current schedule date of the inspection. Click **Next Schedule Date** and select one of the available dates that show in the calendar.
4. Click **Submit**.

Submitting Inspection Results

Code enforcement inspectors submit results after inspecting the location related to the incident or case. To submit the result of an inspection:

1. Select the inspection you want to submit from the Worklist page.
2. On the Inspection page click **Result Inspection**.
3. Select the desired option from the available list of results.
4. On the result page include comments or attachments, as needed. The fields displayed on the result page are determined by the result option you have selected.
5. Click **Submit**.

The result options you see are determined by the status of the selected incident or case. The following tables list the various status-based outcomes that are available for the submission of inspection result:

Statuses and result options available for an incident:

Status at the time of inspection	Result of the inspection
Inspection	**In compliance**: The status of the incident changes to Compliance and the inspection is closed.
	Violation: A case is created with a status of Violation and a re-inspection is scheduled, which must be updated by the code enforcement officer.
	Referral: The status of the incident changes to Referral and the inspection is closed. The referral body that is configured on the Referral Body page is used for the referral incident.
	Closed: The inspection and the incident are closed.

Status at the time of inspection	Result of the inspection

Statuses and result options available for a case:

Status at the time of inspection	Result
Violation	**In compliance**: The status of the case changes to Compliance and the inspection is closed.
	Remains in Violation: • The status of the case and the compliance date remain unchanged. • A notice is created, which must be updated by the code enforcement officer before printing it.
	Issue Citation: • The status of the case changes to Citation and the inspection is closed. • The compliance date is extended. • A notice is created, which must be updated by the code enforcement officer before printing it. • A re-inspection is scheduled, which must be updated by the code enforcement officer.
	Extension: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up.
	Mandatory Abatement: • The status of the case changes to Mandatory Abatement and the inspection is closed. • The compliance date remains unchanged. • The code technician schedules an inspection.
Citation	**In Compliance**: The status of the case changes to Compliance and the inspection is closed.
	Remains in Citation: The status of the case and the compliance date remain unchanged.
	Issue Citation: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up. • A notice is created, which must be updated by the code enforcement officer before printing it. • A re-inspection is scheduled, which must be updated by the code enforcement officer.
	Mandatory Abatement: • The status of the case changes to Mandatory Abatement and the inspection is closed. • The compliance date remains unchanged.

Status at the time of inspection	Result
	• The code technician schedules an inspection.
	Extension: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up.
Mandatory Abatement	**Abatement Complete**: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status.
	Abatement Incomplete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status.

Installing and Configuring Oracle Municipal Code Officer

You must install and configure the Oracle Municipal Code Officer to use the mobile inspections application in the field.

Oracle Public Sector Community Development Code Enforcement provides a mobile inspections application for agency staff to download and install on their mobile devices. The Oracle Municipal Code Officer mobile application is not intended for use by the public. Although the Oracle Municipal Code Officer 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 Municipal Code Officer 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. Use the Mobile Application Activation link that you have received from your administrator to access the application. The only role that has access to the mobile application is the code enforcement officer.

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

Installing Oracle Municipal Code Officer

You must install the Oracle Municipal Code Officer 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 Municipal Code Officer provided by the application store.

Configuring the Oracle Municipal Code Officer Environment

To configure Oracle Municipal Code Officer:

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 Municipal Code Officer 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.
4. As the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.
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 – Worklist – appears for the current day.

For more information about inspection tasks in Oracle Municipal Code Officer, see *Oracle Municipal Code Officer Overview*.

6 Managing Cases

Reviewing and Claiming Cases

A case is created when an inspection results in a code violation or citation. Agency staff can create a case directly, without an incident being reported. Code enforcement technicians use the worklist to view a list of unassigned cases and claim them as necessary.

Code enforcement technicians have two options for reviewing and claiming cases:

- Viewing a case summary on the Worklist page and then clicking the **Claim** button.

  The code technician claiming an incident is by default the assigned technician for the case. This option is used for claiming a new case created directly — without a reported incident.
- Using the Case Overview page to directly update the **Technician Assigned** field.

  Although this option is always available, it's most useful for reassigning the case to another technician.

Reviewing and Claiming Cases Using the Worklist

1. From the agency springboard, click the **Worklist** tile.
2. Select the Unassigned Cases tab. This page lists all the unclaimed cases in the system.
3. Review the following summary information about the case:

Page Element	Description
Case	This column displays: ◦ The case ID that is assigned based on the agency's autonumbering rules. ◦ The issue type and subtype, separated by a hyphen.
Creation Date	Displays the date on which the case was created.
Location	Displays the location of the issue.
Issue Description	Displays the description of the case
Case Status	Displays the status of the case, for example, Compliance, Violation, Citation, and so on.
Comply by	Displays the last date to ensure compliance.

4. If necessary, review the complete details for the case.

   a. Click the **View More Details** icon to access the Case page.
   b. On the Case page, review the information on the Overview, Details, Inspections, Notices, and other tabs. See *Navigating to Case Details*.
   c. Click the **Back** icon in the banner at the top of the page to return to the worklist, and re-navigate to the Unassigned Cases tab.
5. Click the **Claim** button to claim the case.

   Claiming a case makes you the assigned technician. As the assigned code technician, you are now responsible for processing the case.

Reviewing and Claiming Cases on the Case Detail Page

1. Select the **Case List** tile on the Agency Springboard, then click **View More Details** for a specific case.
2. In the **Overview** section of the Case page, search and select a code technician from the **Technician Assigned** field.

Note: The new assignment is saved immediately. You do not need to explicitly save, nor do you have an option to cancel the change.

Processing Cases

Agency staff view information and statuses for all the code enforcement cases they are assigned. You can perform actions such as creating a case and accessing detailed case information from the Cases page.

As agency staff such as a code technician, you can use the Cases page to view a complete list of cases. Go to the list of cases to perform these tasks:

- Manage case activity.
- Create a case.
- Update case status.
- Access details about case history.

Using the Cases Page

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. You can perform these actions to display cases that meet specific criteria:

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 cases in the list. The cases that meet the search criteria are displayed on the page.

Page Element	Description
	When you search on dates, use this format: MM/DD/YYYY.
Filter By	Apply filters to display cases 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. You can use the predefined filters Case, Creation Date, Issue Description. Case Status, and Comply By. Case filter is not available in the worklist.
Sort By	Select an option to sort the cases in the list by these fields: ◦ Case ◦ Creation Date ◦ Location ◦ Issue Description ◦ Case Status ◦ Comply By

Managing Case Activity

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, you can locate the basic information about the case using the following information:

Page Element	Description
Create Case	Click to create a new case. This option is not available in the Worklist — Cases page. You should navigate to the Cases page using the **Case List** tile.
Case	View the case ID, issue type, and issue subtype.
Creation Date	View the date on which the case was created.
Location	View the location of the issue.
Issue Description	Review the description of the case.

Page Element	Description
Case Status	View the status of the case, for example, Compliance, Violation, Citation, and so on.
Comply by	View the last date to ensure compliance.
Actions	Click to perform actions such as updating status.

Creating a Case

Agency staff such as a code technician can directly create a code enforcement case when they identify a code violation. Such a case is listed as an unassigned case, among other cases that originated from reported incidents.

To create a case:

1. Select the **Case List** tile on the Agency Springboard.
2. The Cases page lists all cases created out of reported code violations. Click the **Create Case** button.
3. On the Select an Issue Type page, select the type and subtype of the issue you want to report for the code violation.
4. On the Provide the Location of the Issue page, enter the location details or use the map to locate the address for which you are reporting the violation. Click **Next**.
5. On the Tell Us What's Going On page, enter the description of the issue you are reporting. You can also attach a photo, video, or an audio file as reference. Click **Next**.
6. On the Just a Few More Questions page, enter additional information such as setting the priority of the case. Click **Next**.

   The fields available on this page are configured by the agency administrator on the Issue Subtype page. For more information about issue subtypes, see *Setting Up Issue Subtypes*.
7. On the Code References page, click **Add**. Select one or more code references from a list of current or other violations and click **Done**. Click **Next**.
8. Review the information you entered on the Review page and click the **Submit** button.

You will see the case transaction is now listed in the Cases page. This unassigned case transaction will now be listed in the Unassigned Cases tab on the Worklist page. A code technician should claim the case from the worklist and proceed for further processing.

See the next session for the case related pages and their descriptions.

Navigating to Case Details

You find detail pages in a collection that consolidates all aspects of a code enforcement case, including property information, inspections, case information, responsible parties, citations, fees and payments, case history, and more.

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

To access the case detail pages:

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. Locate the case you are working with and click the **View More Details** button on the case row.
3. Navigate to case information using the links in the left panel.

The information for a case comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected case with links to more detail. See *Viewing the Case Detail Overview*.
Property Information	View parcel data from the case and a map of the parcel location. See *Working with Case Property Information*.
Inspections	View a list of inspections scheduled for the case. You can also schedule inspections from this page. See *Working with Code Enforcement Inspections*.
Notices	View a list of notices sent for the selected case. You can also generate notices from this page. See *Working with Notices*.
Code Enforcement Code References	View a list of code references related to the violations pertaining to the case. You can also add additional code references from this page. See *Working with Code Enforcement Code References*.
Comments	Review or add comments pertaining to this case. See *Working with Comments*.
Attachments	View a list of files and upload or download documents on this page. See *Working with Attachments*.
Appeals and Hearings	View a list of appeals and hearings that are raised for the case. See *Working with Appeals and Hearings*.
Responsible Parties	View the details of the party responsible for the violations leading to the case. You can also add a responsible party from this page. See *Adding Responsible Parties*.
Citations	View a list of citations issued for the case. You can also issue citations from this page.

Page Name	Description
	See *Working with Citations*.
Fee and Payments	Review citation fees assessed and payments due. See *Working with Citation Fees and Payments*.
Case History	View a list of updates that were made to the case such as changing the case status or the compliance date, along with the reason for the update. See *Working with Case History*.

Viewing the Case Detail Overview

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

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

As agency staff, you can use the Overview page to set the status of the case, assign inspectors and technicians to the case, update the issue description, and change the priority of the case.

Using the Overview Page

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. On the Overview page, review details or enter the following information in the **Overview** section:

Page Element	Description
Case Status	Review the case status. To change the status of the case, click the **Edit** link to open the Update Status page, select a new status value, and enter a reason for the change. Click **Done**.
Inspector Assigned	Assign an inspector to the case by using the look-up prompt.
Technician Assigned	Assign a technician to the case by using the look-up prompt. Technicians can claim cases from the worklist. To access the worklist, select **Worklist** on the Agency Springboard and click the Unassigned Cases tab.

Page Element	Description
Issue Description	Review the description of the issue. To update the description, click the **Edit** link to open the Update Issue Description page and change the description text. Click **Done**.
High Priority	Indicates the priority of the case. To update the priority, click the **Edit** link to open the Update Case Priority page, select the switch, and use the calendar to select a new compliance date. Click **Done**.
Compliance Date	Review the date by which the case must ensure compliance, which is calculated based on the time rules set up by the agency. If there is no compliance date recorded, the page shows the **Add** button. You can click to open the Compliance Date page and enter the compliance date. Click **Done**. To update the compliance date, click the **Edit** link to open the Update Compliance Date page, select a new date from the calendar, and enter a reason for the change. Click **Done**.
Reported Date	Review the date on which the incident was reported.
<number> days to comply	Review the number of days left to ensure compliance.

4. On the Overview page, review important information about the selected case in separate sections. Click the **View Details** link to navigate to the page. Only those sections that contain data records to show are displayed in the overview page.

Working with Case Property Information

Property information shows the location details of the property that is associated with the case. The information includes the parcel ID, address of the property, and the name of the property owner. You can change the property using a search, or update the existing property details using the edit option.

Viewing Parcel Information

You view the parcel associated with this case on the Property Information page. You can also view the parcel location on a map.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Select the Property Information tab in the left panel to open the detail view of the property.

Changing Property

You can change the property associated with the case on the Property Information page.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. In the case details, select the Property Information tab in the left panel to open the detail view of the property.
4. On the Property Information page, click the **Search** button.
5. On the Search Property page, search a new parcel and click **Select**.

Updating Property Address

You can update the parcel address associated with the case on the Property Information page.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. In the case details, select the Property Information tab in the left panel to open the detail view of the property.
4. On the Property Information page, click the **Edit** button.
5. On the Update Property Information page, you can enter new values for the address, city, and state. Click **Done**.

Working with Code Enforcement Inspections

The case information includes a consolidated list of inspections that are carried out and those that are scheduled for a case. As a code technician you manage inspection activity for a case — including reviewing inspection count, status, assignments, schedule dates, results and more — on the Inspections page.

As agency staff, you use the Inspection list page to view a complete list of case inspections that were carried out and scheduled for future. Access the inspections list in the case details to perform these tasks:

- Review inspection activity recorded by the inspector.
- Perform actions such as scheduling, rescheduling, and canceling an inspection.

> **Note:** As part of the inspection process, an inspector uses a mobile device to reschedule the inspection, add comments and attachments, and submit a result of the inspection. If the submitted result is Violation or Citation, all the entered details are captured and made available on the Inspections page of the case. The Inspections page can be accessed by the agency staff only on a laptop or a desktop computer. For details on Mobile Inspections, see *Oracle Municipal Code Officer Overview*.

Viewing Inspection Information

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the case you are working with by clicking the **View More Details** button.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, you can view inspection information in these fields:

Page Element	Description
Schedule Inspection	Click to open the Schedule page and use the calendar to select from the dates that the assigned inspector is available for an inspection. **Note:** This option is available only if there are no pending inspections scheduled. The status of all the inspection schedules must be either Completed or Canceled.
Inspection	View the number of inspections carried out till date for the case. The format of the inspection count is set up by the agency administrator on the Inspection Count page. See *Setting Up Inspection Counts*.
Inspection Status	View the status of the inspection: ◦ Completed ◦ Scheduled ◦ Canceled
Assigned To	Identifies the inspector assigned to the case.
Scheduled Date	View the date on which the inspection is scheduled.
Inspection Completion Date	View the date on which the inspection was completed.
Inspection Outcome	View the result of the inspection. ◦ **In compliance** ◦ **Violation** ◦ **Referral** ◦ **Remains in Violation** ◦ **Issue Citation** ◦ **Remains in Citation** ◦ **Extension** ◦ **Mandatory Abatement** ◦ **Closed** For more information about submitting inspection results, see *Oracle Municipal Code Officer Overview*.

Page Element	Description
Reschedule	Click to open the Schedule page and use the calendar to select the next available date for the assigned inspector to schedule the inspection. **Note:** This option is available only for inspections that are not completed.
Canceled	Click to cancel the inspection schedule. **Note:** This option is available only for inspections that are not completed.

Viewing Inspection Detail

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the case you are working with by clicking the **View More Details** button.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, click **View More Details** for the inspection record you want to view.
5. On the Inspection Detail page, you view the details of the inspection along with any comments and attachments included by the inspector at the time of inspection.
6. To enter a comment, click the **Add Comment** button to open the Add Comment page. You can add an existing comment or enter a new one. Click **Save**.
7. To add an attachment, click the **Add** button and select the attachment. Enter a description and click **Upload**.
8. Close the Inspection Detail page.

Scheduling Inspection

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the case you are working with by clicking the **View More Details** button.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, click **Schedule Inspection**.

   This option is available only if there are no inspections already scheduled for the case.
5. On the Schedule page, use the **Next Schedule Date** field to select a date from the calendar, which shows only those dates that the assigned inspector is available.
6. Click **Save**.

   The new schedule is listed in the Inspections page and the **Schedule Inspection** button is no longer displayed. The assigned inspector receives a notification on his mobile application about the new inspection schedule.

Rescheduling and Canceling Inspection

You can reschedule or cancel an inspection schedule that is not completed.

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.
   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the case you are working with by clicking the **View More Details** button.
3. Click **Inspections** in the left navigation panel of the case details.
4. To reschedule, click the **Reschedule** button on the inspection row.
5. To cancel the schedule, click the **Cancel** button on the inspection row.

After you cancel an inspection schedule, you schedule a new inspection using the **Schedule Inspection** option.

Working with Notices

Once a case is created, a corresponding notice object is automatically created and access is made available in the Worklist and in the case details. As agency staff, you generate a notice from the notice object, update the various details, review, and print it for dispatch.

You can access the notice record using any of the following navigations:

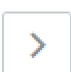
- Notice of Violation and Notice of Citation tab: **Agency Springboard** > **Worklist** > **Notice of Violation** and **Notice of Citation**. The **Generate** or **Continue** option is available in the row. Click **View More Details** if you want to view the complete details.
- Case Overview page:
  Agency Springboard > **Case List** . Select the case you are working with. On the Overview page, scroll down to the Notices section . The **Generate** or **Continue** option is available in the row . Click **View Details** if you want to view the complete details.
- Notices Page:
  Agency Springboard > **Case List** . Select the case you are working with. Select **Notices** in the left navigation panel.

Viewing Notices

You view a list of notice records for the case citation and violation in the case detail pages.

The **Notices** page shows the list of all notices for the case. You can view the information and perform actions as described here:

Page Element	Description
Notice ID	View the identifier of the notice.
Notice	View the generated name of the notice, based on the nature of violation.
Case Status	View the status of the case:

Page Element	Description
	• Violation • Citation
Status	View the status of the notice: • Pending: Indicates that the notice object is created. • In Progress: Indicates that details are entered in the notice and saved. • Generated: Indicates that the notice is generated and printed. • Sent: Indicates that the notice has been sent to the responsible party. • Received: Indicates that the notice was received by the responsible party.
Sent Date	View the date on which the notice was dispatched.
Tracking Number	View the tracking number associated with the shipment of the notice.
Attachment	Icon to indicate that an attachment is present in the notice.
Received Date	View the date on which the notice was received by the responsible party.
Actions	Select from available options, which is based on the status of the notice: • Generate : Click to open the Generate Notice page and enter details to generate the notice. This option is available only for the notice records in Pending status. • Continue: Click to open the Generate Notice page and complete the details of the previously saved notice. This option is available only for the notice records in In Progress status.
	Click to open the Edit Notice Details page to enter additional details about the notice, such as tracking details. This option is available only for the notice records that are in Generated, Sent, or Received status.

Generating a Notice

You can generate a notice from the Worklist or from case details.

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Generate** button.

   > **Note:** This option is available only for the notice records in Pending status. If the status is in In Progress, you will see the **Continue** option. Use this option in case the notice was generated earlier and saved for later.

3. On the Generate Notice page, the top section shows notice information such as the name, issue type and subtype.

   Use the **Edit Notice Details** section for information on:

   - Verify Details: Enter the compliance date and a description about the violation or citation.

- Responsible Party and Mailing Address: Click the **Add** button to search and select a responsible party associated with the violation or citation. You can click the responsible party row to open the Update Responsible Party page and make changes to the contact details.
- Code References: Review the list of code references added by the agency staff. You can delete one or more code references. To add them, you should access the **Code References** page.

Use the **Enter Tracking Details** section to enter the details of the notice shipment such as the carrier name, tracking number, and any comments.

4. Click **Save Changes**. You can close the window and return to the notice at a later time. You can use the **Continue** button to access this page later.
5. Click **Review and Print**. The notice page opens in a new window. You can review the details, print the document, and send it to the responsible party.
6. Click **Done** on the Generate Notice page. The status of the notice record changes to Generated and the record is removed from the worklist. You can access the record on the Notices page, which lists all the notices records for the case.

Editing Notice Details

For notices that are in the Generated or Sent status, you can review and update the details.

1. Select **Case List** on the agency Springboard.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Select **Notices** in the left navigation panel. Select the notice row which you want to update.
4. On the Edit Notice Details page, the top section shows the notice ID, status, and the notice name.

   The **Tracking Details** section allows you to enter the details for sent date, carrier name, tracking number, and the received date.

   The **Attachments** section allows you to add, view detail, download and delete attachments. Example of an attachment can be a copy of the report that was sent to the responsible party.

> **Note:** The status of the notice changes when you enter the dates for the Sent Date/ Received Date fields and save the page.

Working with Code Enforcement Code References

Agency staff view, add, and manage code references associated with a case on the Code Enforcement Code References page. You add one or more code references to a case based on the specific code used on a violation.

In addition to the code references included by the system based on the incident issue type, inspectors add code references during their inspection using their mobile device.

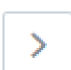
Agency staff such as a code technician manage the code references using the Code Enforcement Code References page in case details. For more information on mobile inspections, see *Oracle Municipal Code Officer Overview*.

Viewing Code References

View a list of code references that are associated with a case, along with a corresponding corrective action to resolve the violation.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Case Information** and then select **Code Enforcement Code References** in the left panel to open the list of code references.

Page Element	Description
Code Reference ID	View the identifier of the code reference.
Summary	View the summary information about the code reference.
Corrective Action	View the corrective action that should be taken to resolve the violation and ensure compliance.
Actions	Click the **Delete** icon to remove the code reference from the case. **Note:** You can also remove code references at the time of generation a notice. See *Working with Notices*.
	Click to view the details of the code reference on the code reference detail page.

Viewing Code Reference Details

View the details of a code reference on the Code Enforcement Code Reference Details page.

You add code references to a case using the Add References page.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Click **Case Information** and select Code Enforcement Code References in the left panel to open the list of code references.
4. Click the **View More Details** button for the code reference you want to view.
5. View the details of the code reference on the Code Enforcement Code Reference Details page.

Adding Code References

You add code references to a case using the Add References page.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Click **Case Information** and select Code Enforcement Code References in the left panel to open the list of code references.
4. Click **Add Code Reference** to open the Add References page and complete details using the search field. The Search tab allows you to search for specific code references and the Selections tab shows the code references you have selected:

Page Element	Description
Current violation and **Other violation**	◦ **Current violation**: View a list of code references associated with the issue subtype that was selected at the time of recording the issue or violation. ◦ **Other violation**: View a list of all the code references in the system.
Search look-up	Search by entering the name of a specific code reference using the look-up. Select one or more code references using the check boxes and click **Done** to include them in the case.

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.
   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:
   - Favorite: Comments that you have marked as favorite.
   - Standard: All the predefined comments available.
   - 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 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. **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.

Page Element	Description
	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 Appeals and Hearings

Agency staff can request an appeal on behalf of the responsible party, for a violation or citation that the responsible party has received. The details of the requested appeals, their hearing schedules, and decisions can be seen in the case details — Appeals and Hearings page.

Viewing Appeals and Hearing Decisions

1. Select the **Worklist** tile on the Agency Springboard and select the Appeals tab. This page lists only the cases that are appealed. Click **View More Details** for the case row you want to access.

   Alternatively, you can access the Appeals and Hearings page by selecting the **Case List** tile on the Agency Springboard. Click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel.
2. The Appeals and Hearings page lists all the appeals and hearings for the case:

Page Element	Description
Appeal Type	View the type of appeal that was requested: ◦ Violation ◦ Citation
Appellant	View the name of the responsible party.
Status	View the status of the appeal: ◦ Not Scheduled: The hearing is not scheduled. ◦ Scheduled: The hearing is scheduled. ◦ Completed: The hearing is completed with a decision outcome.
Hearing Date	Shows the scheduled date of hearing.
Hearing Decision	View the hearing decision, if completed: ◦ Compliance: The property related to the case is in compliance. ◦ Violation: The property related to the case is in code violation. ◦ Citation: The property related to the case is in code violation and an associated citation fee must be paid.

Page Element	Description
	Note: You can request an appeal for the hearing decision recorded. The number of times an appeal can be requested for a case is set up by your administrator on the Time Rule setup page. See *Setting Up Time Rules*.
Actions	Click to view the actions you can perform on the appeal record: ◦ Reschedule: Select to open the Appeal Violation or Appeal Citation page and select a new available date for the hearing. This option is available only if the appeal is in Scheduled status. ◦ Update Decision: Select to open the Appeal Violation or Appeal Citation page and change the decision-related field values. For more details, see the section Updating Hearing Decision. ◦ View Details: Select to open the Appeal Violation or Appeal Citation page and view the details of the completed appeal. This option is available only for completed appeals.

Requesting an Appeal

You can request an appeal only if there is no active appeal for the case. The time period within which you can request an appeal is determined by your administrator and is set up in the Time Rules page. For more information about time rules, see *Setting Up Time Rules*.

1. Select the **Case List** tile on the Agency Springboard.
2. On the Cases page, click **View More Details** on the case for which you want to request an appeal.
3. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.
4. Click **Request Appeal**. The Appeal Violation or Appeal Citation page opens, depending on the status of the case — Violation or Citation.

Page Element	Description
Appellant	View the name of the responsible party.
Appeal Reason	Enter the reason for requesting the appeal.
Hearing Date	Select a date for the hearing.

Updating Hearing Decision

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.

You can also navigate using the case list. Select **Case List** on the Agency Springboard to view a list of all cases. On the Cases page, click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.

2. Click the **Action** button on the row of the appeal you are working with.
3. Click **Update Decision**.

> **Note:** This option is not available for a completed appeal row.

4. Enter decision related information on the Appeal Violation/Citation page:

Page Element	Description
Appellant	View the name of the responsible party.
Appeal Reason	Update the reason for requesting the appeal.
Hearing Date	Select a date for the hearing.
Hearing Decision	Select the hearing decision that was taken: ◦ Citation/Violation: Continues to be in violation or citation, according to the status of the case. ◦ Compliance: There is no code violation, the case is in compliance.
Decision Date	Enter the date on which the hearing decision was taken.
New Compliance Due Date	Enter the new compliance date, if the hearing decision is Citation/Violation.
New Citation Due Date	Enter the due date for the payment of citation fees, if the decision is Citation.

5. Click **Save**.

Adding Responsible Parties

Agency staff add and manage responsible parties related to the case.

Viewing Responsible Parties

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the **View More Details** button for the case you are working with.

3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.

Page Element	Description
Responsible Party	View the name of the party responsible for the reported violation.
Mailing Address	View the address of the responsible party. You can view the location of the address on a map at the top of the page.
Type	View the type of the responsible party. For example, owner.

Adding Responsible Party

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **Add** button to open the Search Responsible Party page and search the required parcel.
5. Click **Select**.
6. Click **Save**.

> **Note:** Presently you can add only one responsible party to a case.

Updating Responsible Party Detail

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the row of the responsible party to update the details.
5. On the Edit Responsible Party page, you can change values for all fields except for the Type and Country. For the Zip Code field, click the **don’t know** link if you want to manually enter the address detail of the responsible party.
6. Click **Save**.

Deleting Responsible Party

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the row of the responsible party.
5. On the Edit Responsible Party page, click the **Delete** button. You are prompted to confirm the deletion.

Working with Citations

A code enforcement inspector issues a citation as a result of inspection related to a code violation. Citations can also be issued by agency staff such as a code technician using the Citations page in case details. A fee amount associated with each citation record is created, the details of which are listed in the Fees and Payments page.

Viewing Citations

You view a list of all citations issued for a case on the Citations page.

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Citations** in the left panel to open the list of citations.

Page Element	Description
Citation ID	View the identifier of the citation.
Description	View the description of the citation as entered at the time of issuing the citation.
Comments	View comments entered at the time of creating the case.
Due Date	View the due date for paying the citation fee.
Created By	View the name of the agency staff who created the case.

4. Click a citation record if you want to open the detail view of the citation.

Issuing a Citation

Agency staff such as a code technician can issue a citation for a case on the Citations page.

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Click **Citations** in the left panel to open the citations list page.
4. Click the **Issue Citation** button to open the Issue Citation page and enter values for the fields:

Page Element	Description
Description	Enter a description about the citation.

Page Element	Description
Due Date	Enter the due date by which the citation fee must be paid.
Comments	Enter any optional comments related to the citation.

Once a citation is issued, a corresponding citation fee amount is calculated and the fee record is created in the Fees and Payments page. Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For details, see *Setting Up Issue Subtypes*.

For details about a code enforcement inspector issuing citation using a mobile device, see *Oracle Municipal Code Officer Overview*.

Working with Citation Fees and Payments

You view and manage citation fees and payments associated with a case on the Fees and Payments page in the case details.

Viewing Fees and Payments for a Case

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
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 case.
4. On the Fees and Payments page, view a list of fees, including this information:

Page Element	Description
Fee Item	The identifier of the fee.
Citation ID	The identifier of the citation.
Amount	The amount due for the fee. **Note:** Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see *Setting Up Issue Subtypes*.
Currency	The currency in which the fees are paid.

Page Element	Description
Status	◦ Paid ◦ Due
Due Date	The date by which the payment must be made.
Payment Date	The date on which payment was received.

Viewing Fee Item Details

1. Select the **Worklist** tile on the Agency Springboard and click the Cases tab. Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
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 case.
4. On the Fees and Payments page, select the fee item for which you want to view details.
5. On the Fee Item Detail page, view additional information about the fees including department, assessed date, created by, and last updated by.

Note: Code technicians can make citation payments on behalf of the responsible party by using the **I want to — Pay Citation** option on the Agency springboard.

Working with Case History

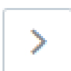
You can track the history of changes made to the case attributes such as the status and the compliance date. Whenever the status or compliance date changes for a case, the change is recorded and is viewable in the details for the case on the Case History page.

Reviewing the Status History

1. Select the **Worklist** tile on the Agency Springboard and select the Cases tab.

   Alternatively, you can select the **Case List** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Case History** in the left panel to view the Case History page for the selected case.

Page Element	Description
Date and Time	View the date and time when the change was made to the case attribute.

Page Element	Description
Updated Attribute	View the attribute that was updated, such as the compliance date or the status.
Trigger	View the trigger action that resulted in this change. For example, a manual update or a citation issued.
Modified By	View the name of the agency staff who updated the attribute value.
Old Value	View the attribute value before the change was made.
New Value	View the new value of the attribute that was saved.
Reason	View the reason for the change in value that was entered at the time of update.
	Click to view the details of the change on the Case History page.

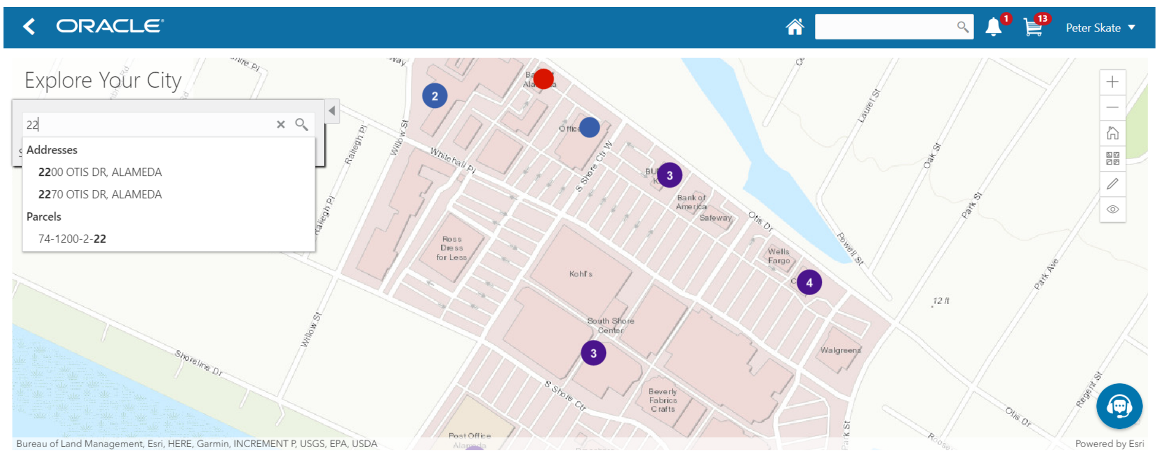
7 Working with Maps

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.

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
	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.

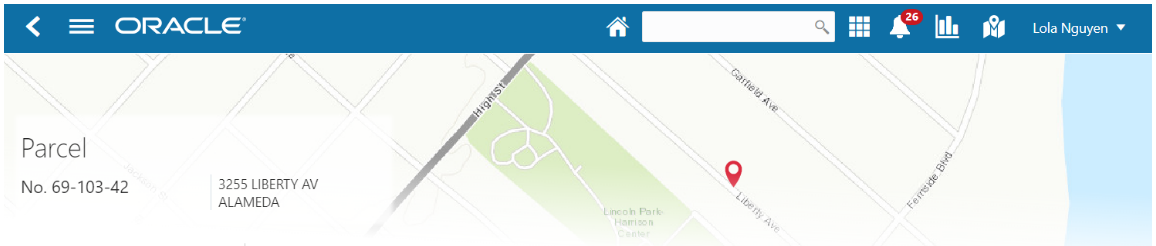
Viewing Map Markers

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.

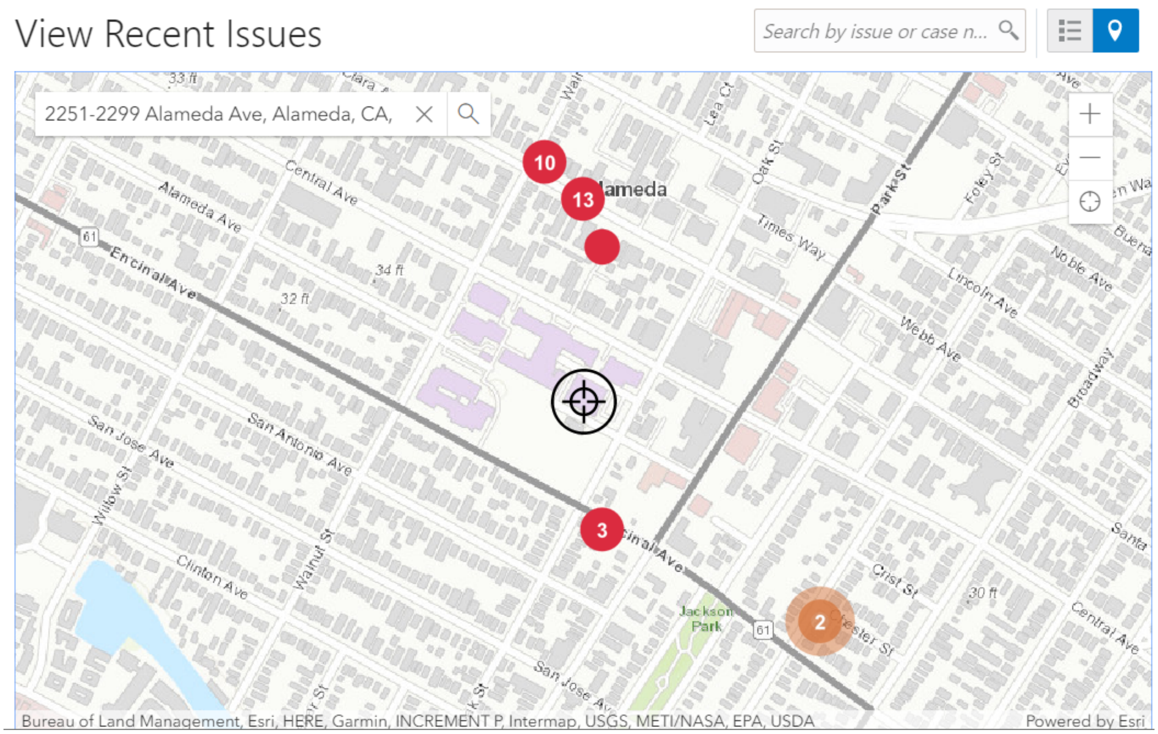


Maps with Multiple Locations Marked

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.

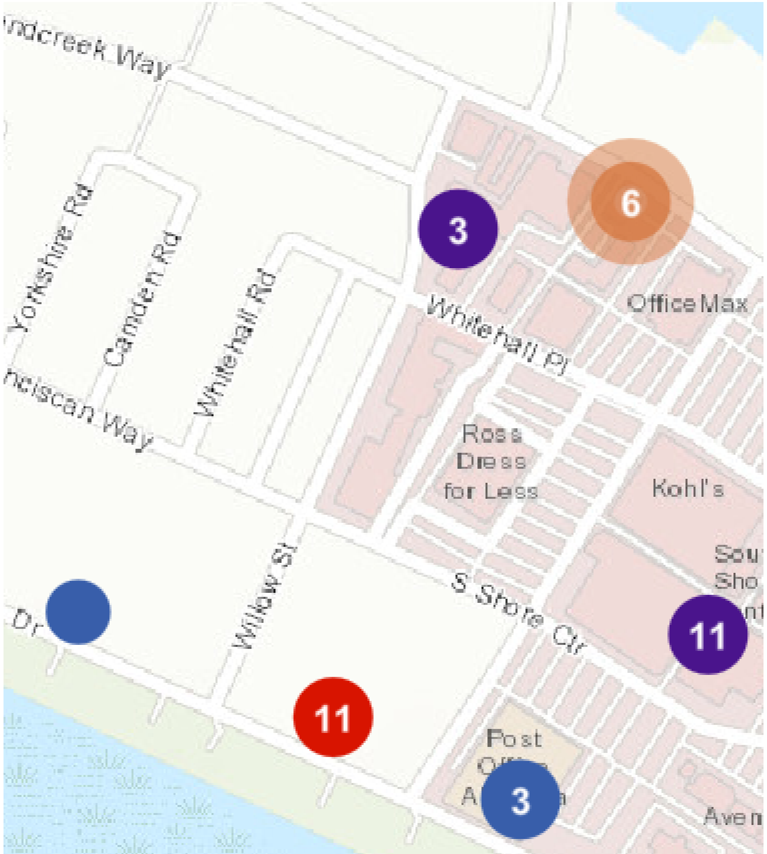
This example illustrates the map for viewing recent code enforcement issues. The red circles, with and without numbers, are individual locations with issues. The orange circle represents a cluster with multiple locations.



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.



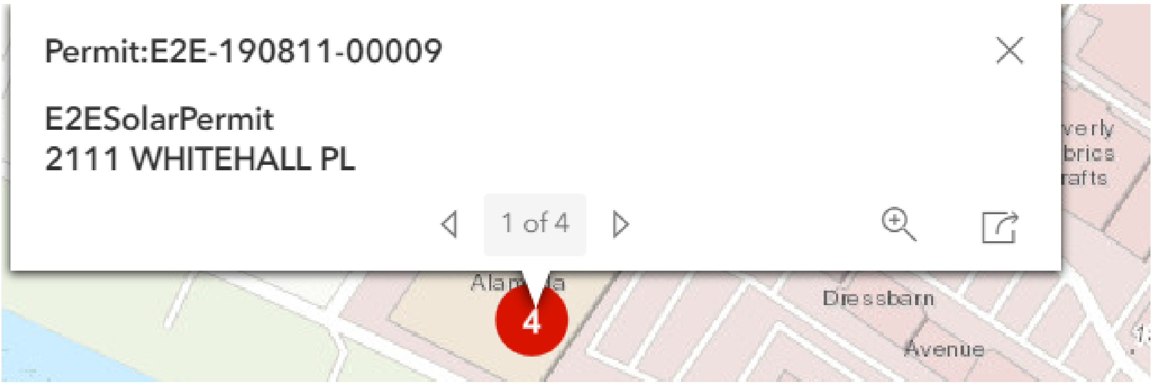
The following table provides a key to the marker colors:

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



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.

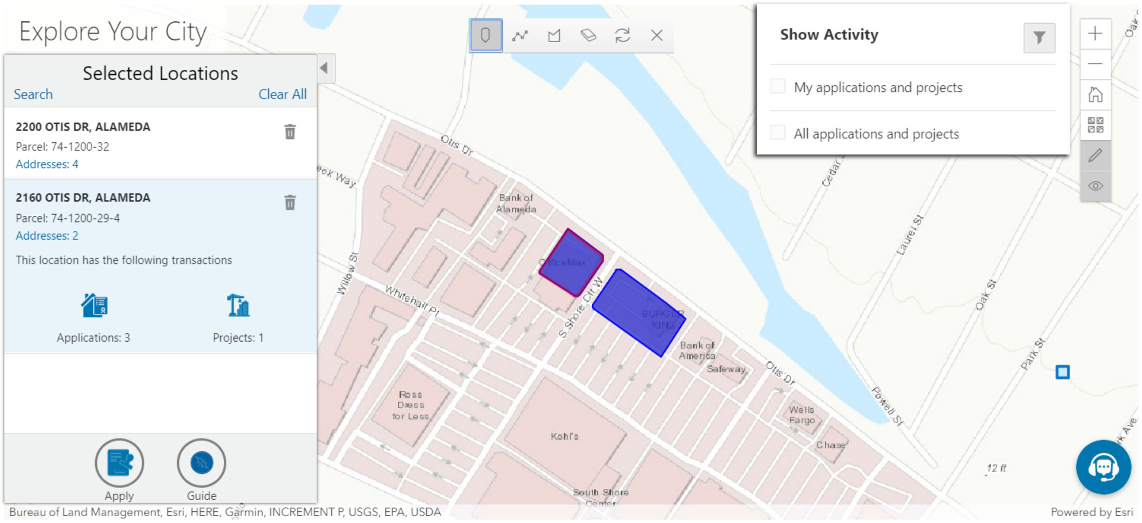
To select parcels or addresses, use the search feature, or the drawing tools on the selection toolbar, or a combination of both.

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.



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:

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.

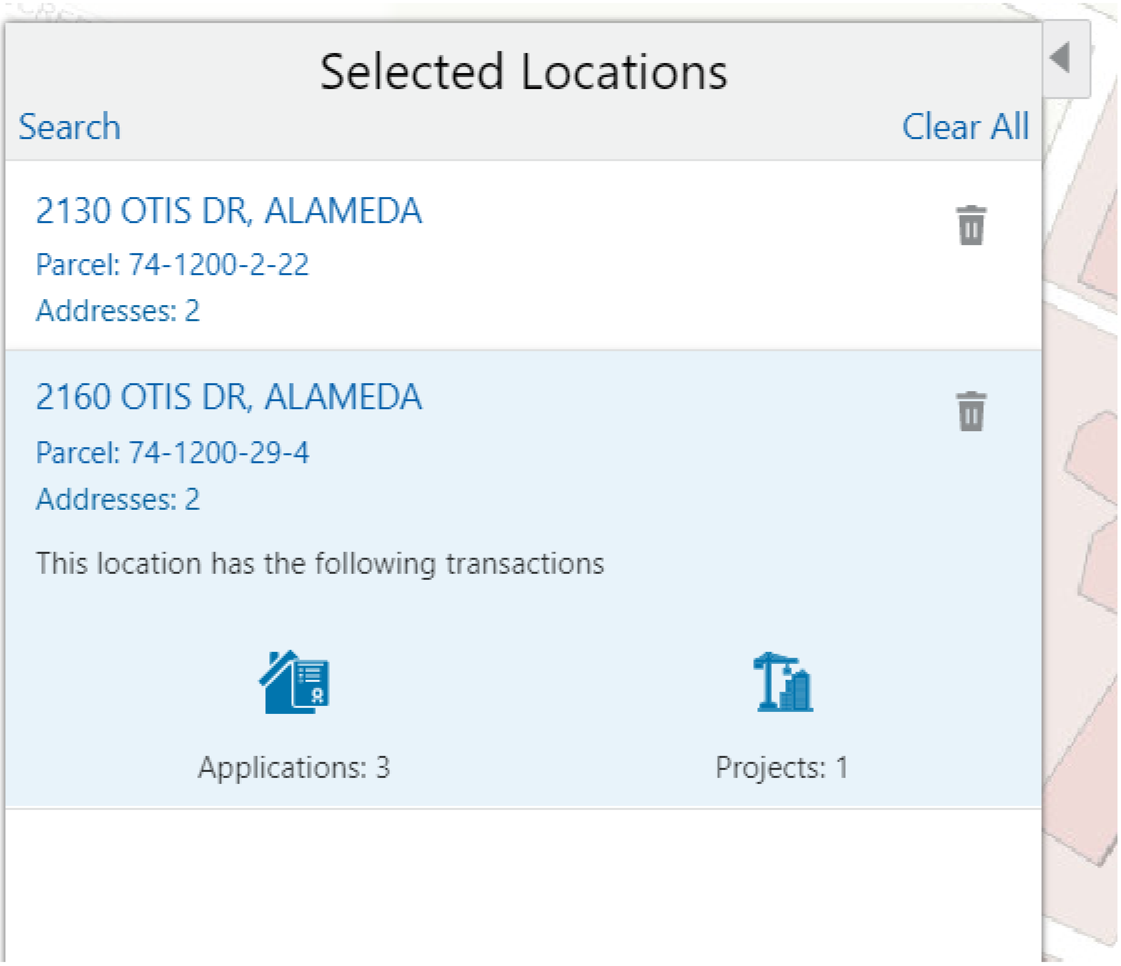
3. Review details of your selections on the Selected Locations list.

   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.

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.

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.

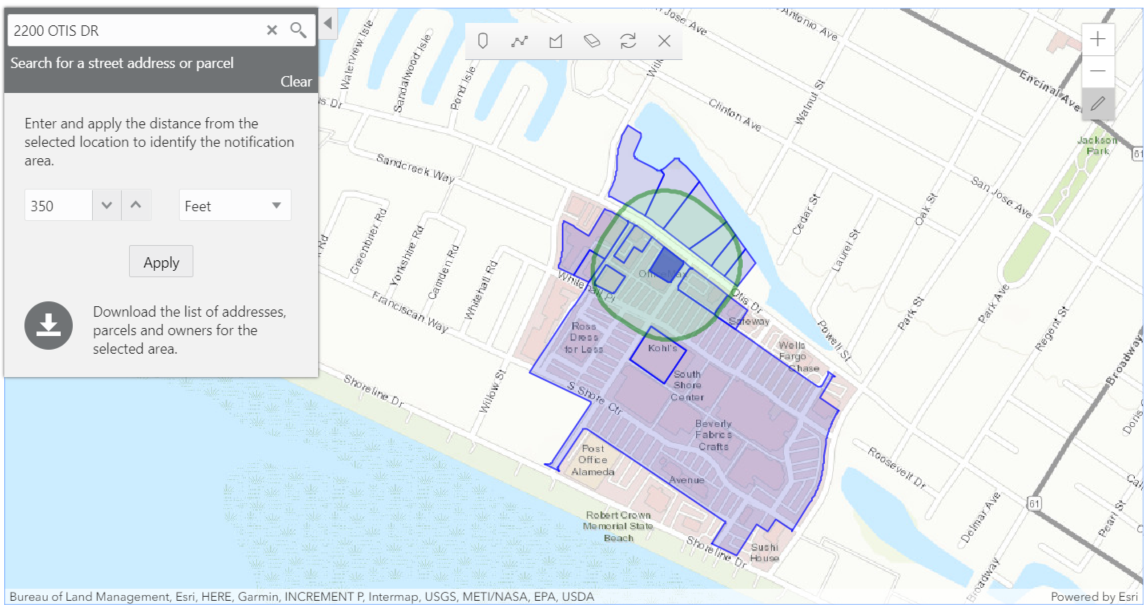
Creating Map-Based Public Notification Lists

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.

8 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.

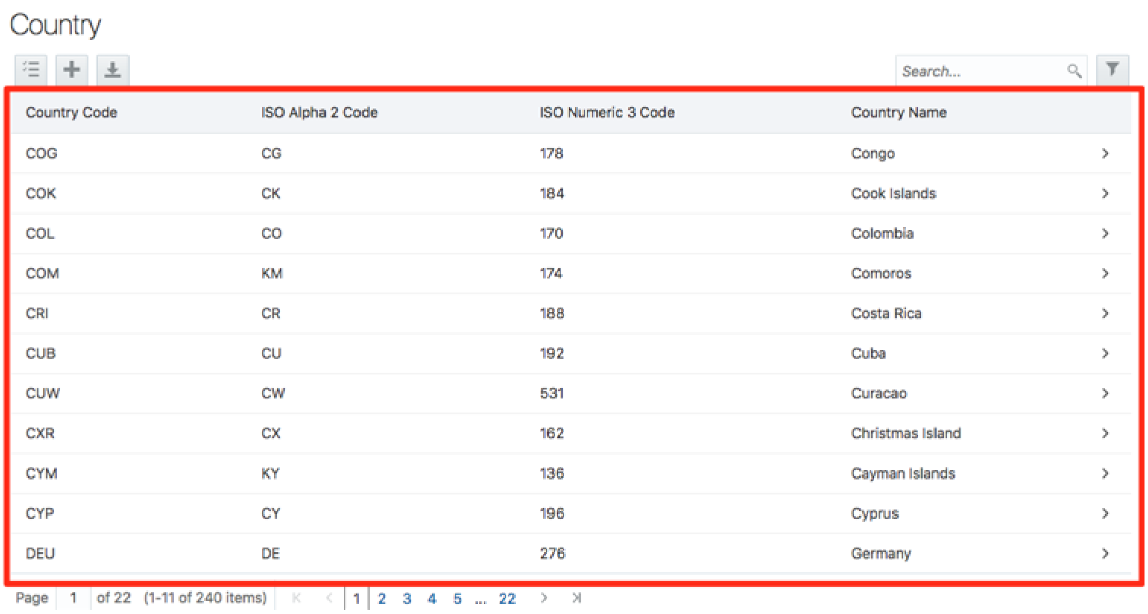
Keyboard Shortcut	Description
<SPACEBAR>	Use for: • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
<ENTER>	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
<DOWN ARROW>	Use for: • Moving through values in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


Country

Search...

Country Code	ISO Alpha 2 Code	ISO Numeric 3 Code	Country Name
COG	CG	178	Congo
COK	CK	184	Cook Islands
COL	CO	170	Colombia
COM	KM	174	Comoros
CRI	CR	188	Costa Rica
CUB	CU	192	Cuba
CUW	CW	531	Curacao
CXR	CX	162	Christmas Island
CYM	KY	136	Cayman Islands
CYP	CY	196	Cyprus
DEU	DE	276	Germany

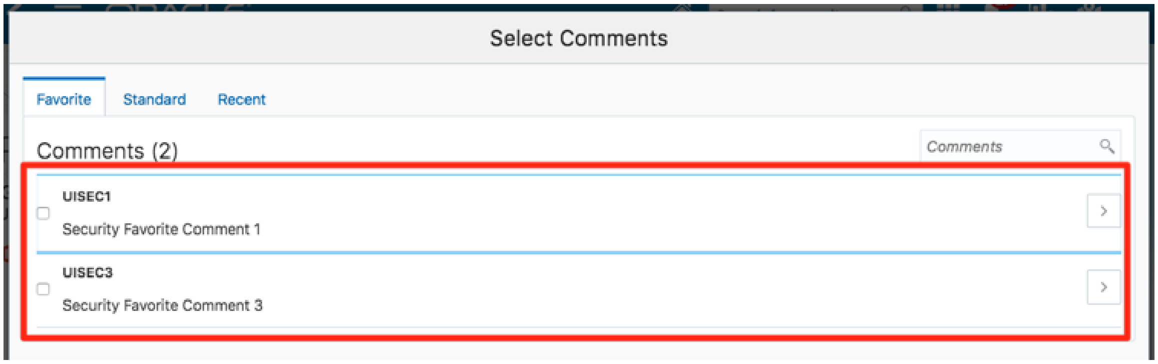
Page 1 of 22 (1-11 of 240 items) 1 2 3 4 5 ... 22

Target	Key	Description
Cell	Tab	The first Tab into the table moves focus to the first column header. The second Tab moves focus to the next focusable element outside of the table. If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row. If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.
	Shift + Tab	The first Shift+Tab into the table moves focus to the first column header. The second Shift+Tab moves focus to the previous focusable element outside of the table. If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row. If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.
	Down Arrow	Move focus to the next row.
	Shift + Down Arrow	Select and move focus to the next row.

Target	Key	Description
	Up Arrow	Move focus to the previous row. If at the first row, then move to the column header.
	Shift+Up Arrow	Select and move focus to the previous row.
	Home	Move focus to first row.
	End	Move focus to last row.
	Space	If chevron icon is used, drill down to the detail.
	Enter	Toggle the current row to actionable mode if there exists a tabbable element in the row. Once toggled to actionable mode, focus will be moved to be first tabbable element in the row.
	F2	Toggle the current row to actionable mode if there exists a tabbable element in the row.
Column Header	Tab	Navigate to next focusable element on page (outside table).
	Shift+Tab	Navigate to previous focusable element on page (outside table).
	Down Arrow	Move focus to the first row.
	Left Arrow	Move focus to previous column header.
	Right Arrow	Move focus to next column header.
	Home	Move focus to first column header.
	End	Move focus to last column header.
	Space	Select column.

List View

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.



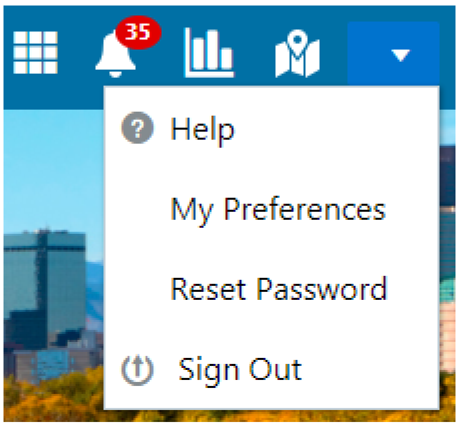
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item. No op if the item is already selected.

Using the Keyboard to Work with Page Controls

This topic describes examples of how to use the keyboard to work with various controls in the interface and select actionable items. Controls are UI constructs such as buttons, accordions, page tabs, and so on.

Buttons

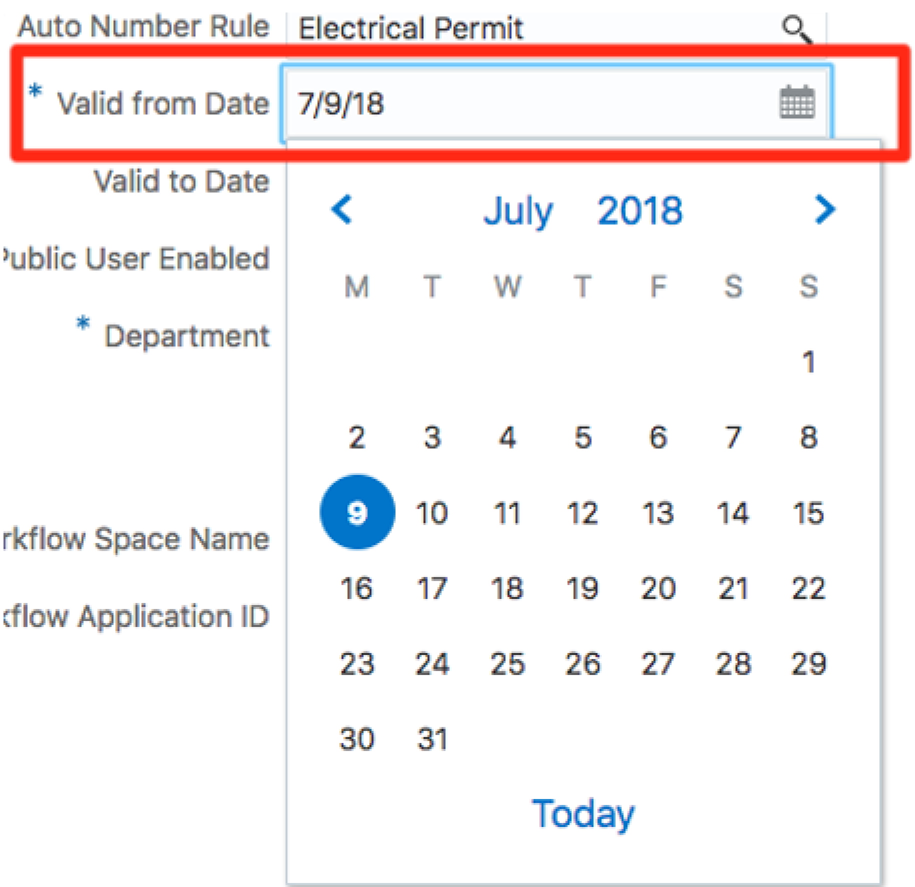
This section describes how to use the keyboard to control buttons in the global header or on pages.



Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

Calendar

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

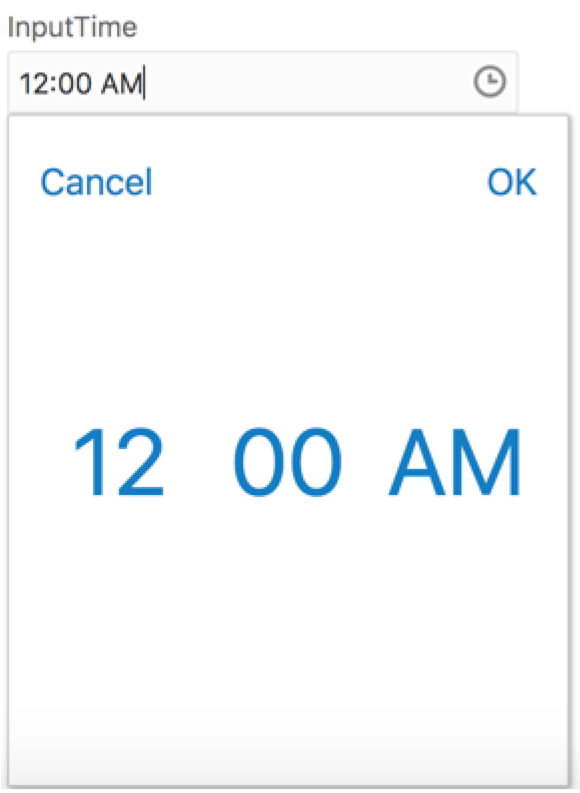


Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calender grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day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

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

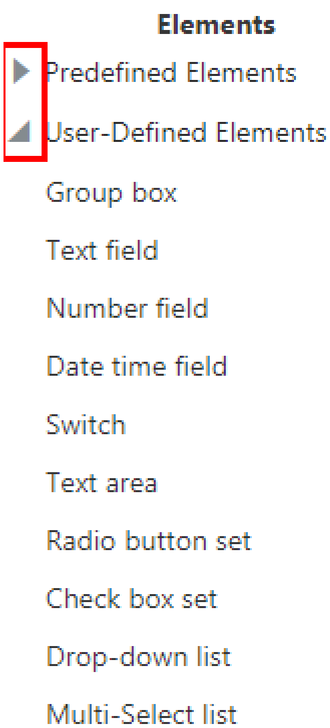
This section describes the hot keys you can use when working with the time picker control to select time field values.



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.



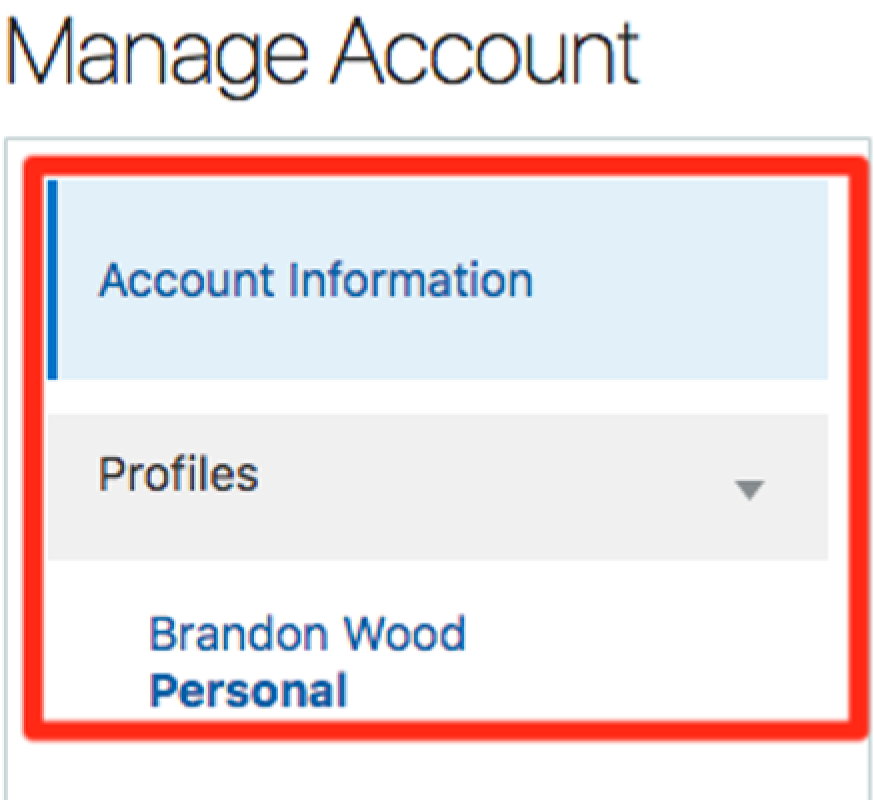
The following table lists the keyboard options for working with the collapsible headers.

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.



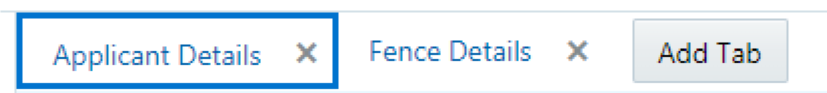
The following table lists the keyboard options used for accessing list items.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.

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.

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.