Oracle Public Sector Compliance and Regulation Cloud

Using Community Development Planning and Zoning

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.

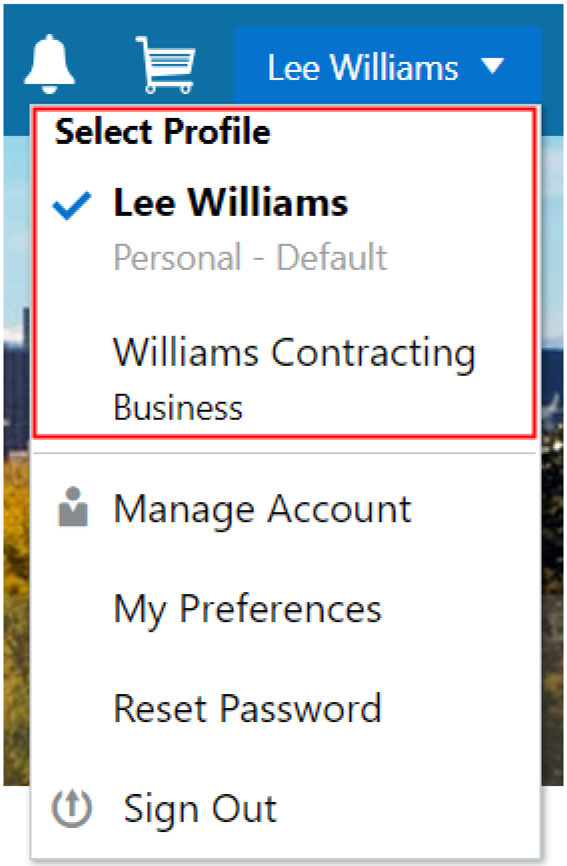
After an account is created, additional profiles can be added. If an account has multiple profiles, any profile can be designated as the default profile. Profiles can be made inactive, but they can't be deleted.

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

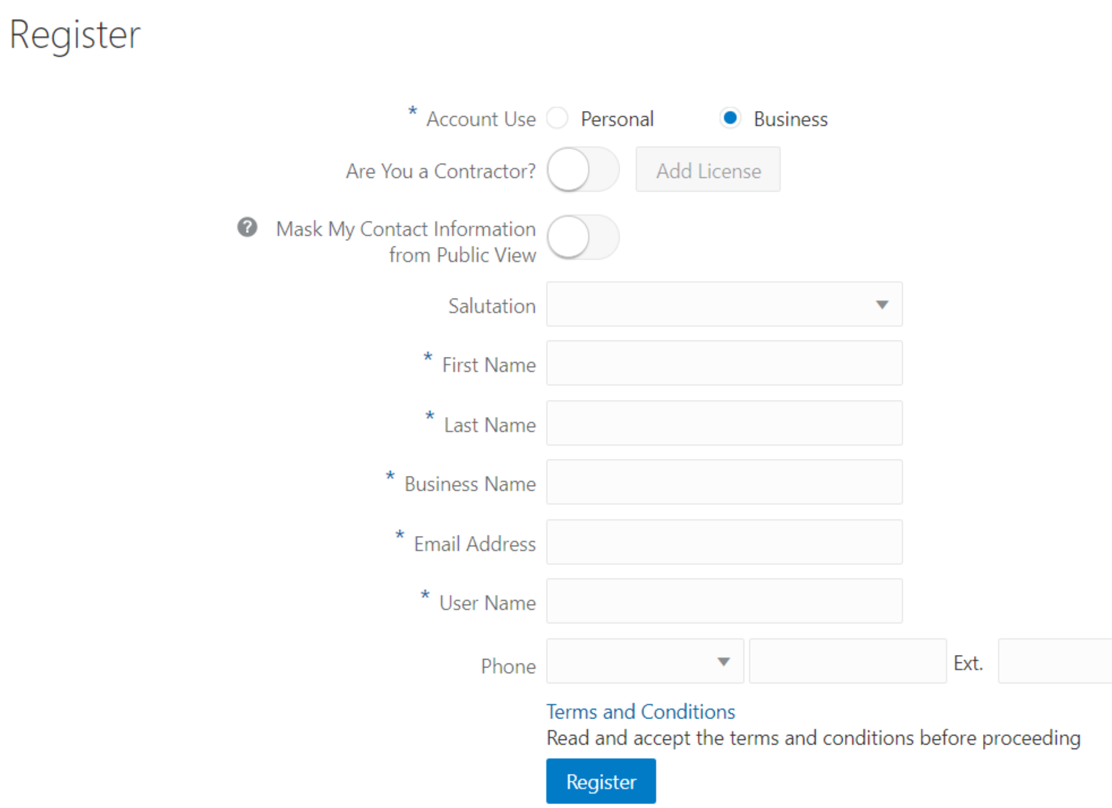
Although anonymous public users can access generic information, users must register before they can create permit applications or planning applications.

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.

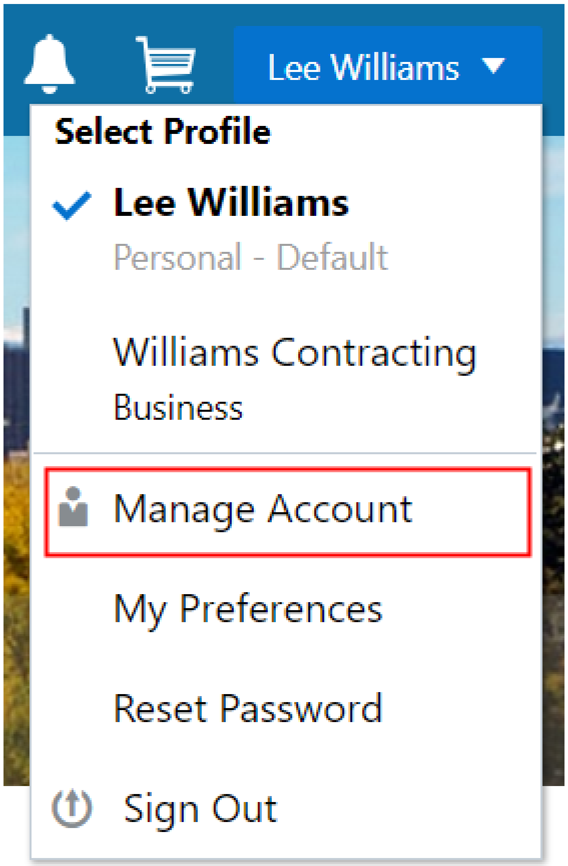
Account Management Navigation for Registered Public Users

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.



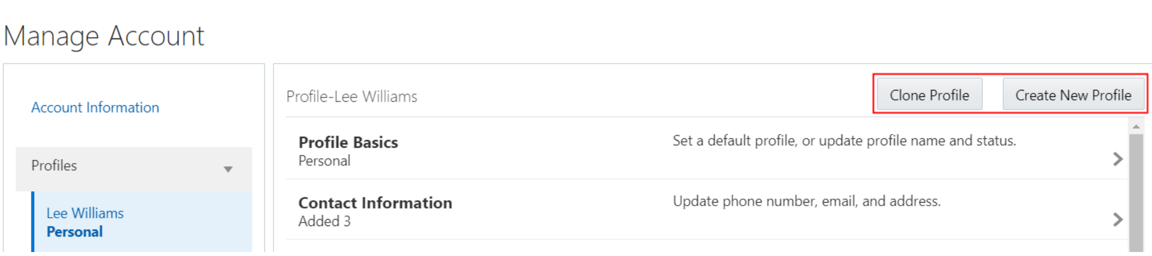
3. Select **Manage Account.**

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.

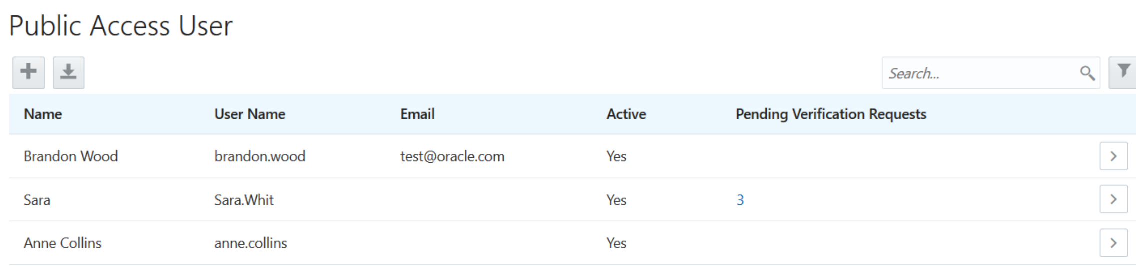
Use the Public User Setup page to configure which types of information require verification. There can be up to three types of information that need to be verified:

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

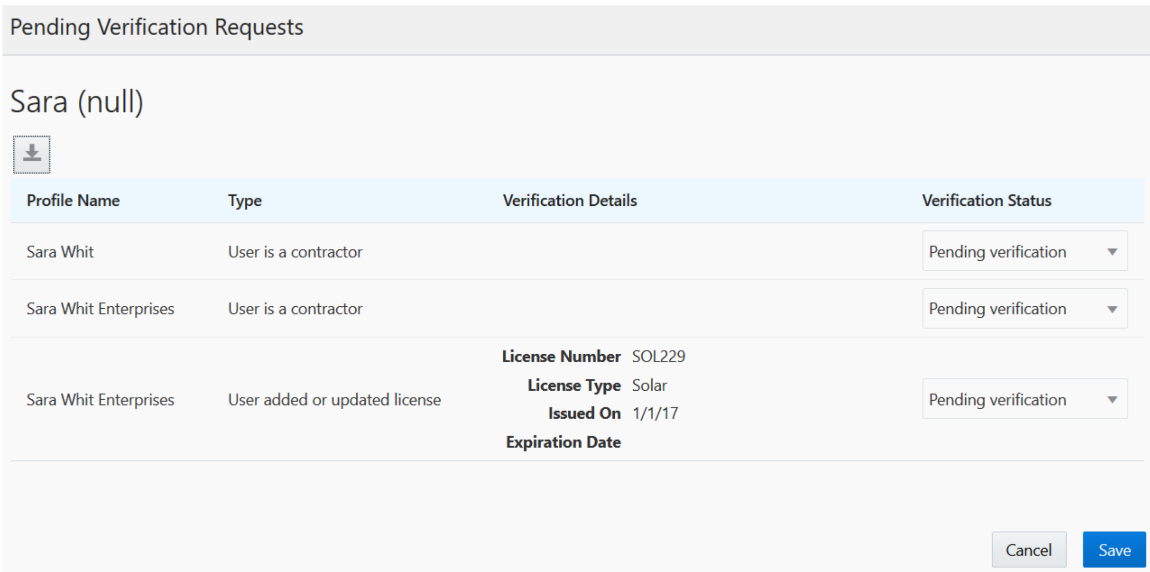
One option for verifying information is to use the Manage Account page. With this option, agency staff can navigate to the various pages that display each type of information, and they can update the verification status on those pages. For more information, see *Managing Public User Accounts*.

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.

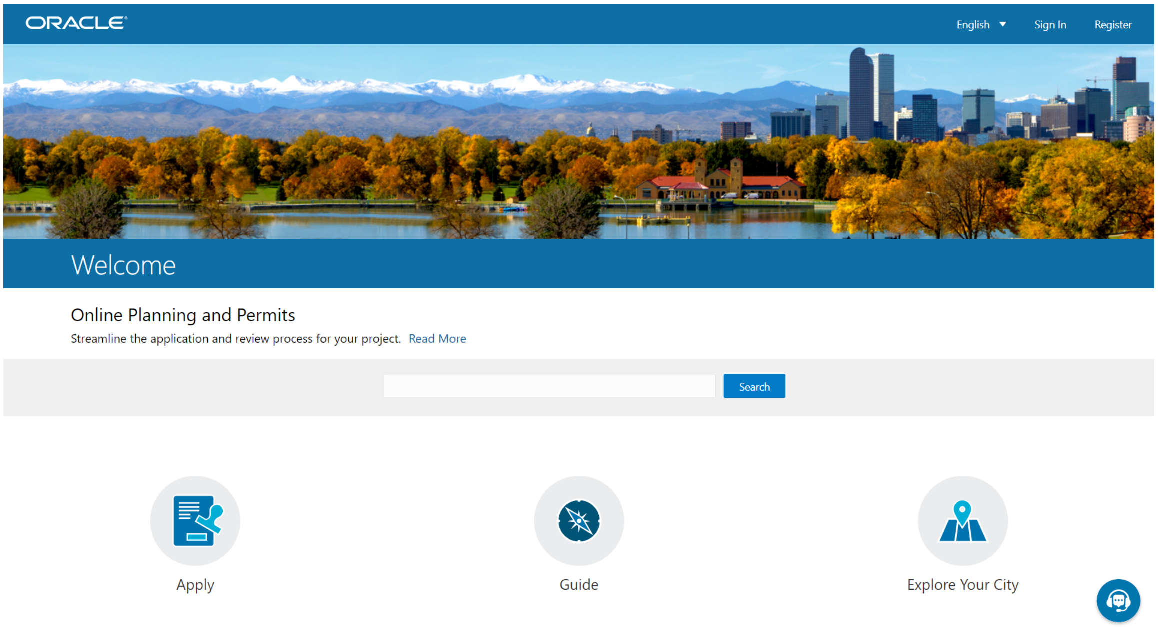
5. Update the **Verification Status** for any requests where the verification process is complete.

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

Overview of Public Landing Page Tiles

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

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



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

Landing Page Configuration

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

For information on configuring landing pages, see *Setting Up the Landing Page for Anonymous Users* and *Setting Up the Landing Page for Registered Users*.

For information on setting up alerts to appear on the landing pages, see *Defining Alerts* and *Working with Ad Hoc Communications*.

For information on setting up the digital assistant button, see *Initializing the Digital Assistant*.

Tiles on the Anonymous User Landing Page

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

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

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

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

Tiles on the Registered User Landing Page

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

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

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

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

Menu Link	Description
Applications	Provides access to a list of the user's own applications, including permit applications and planning applications. The list has a regular list view, a grid view, and a map view. From the list, the user can access application details. The number of active applications appears in the tile label. This number includes both permit applications and planning applications. If one or more conditions have been applied to the user's applications, a conditions icon appears below the tile. The icon associated with the most severe condition is displayed. For example, if there is a permit application with a lock condition. which prevents further activity on the permit, and another permit application has a notice or informational condition placed on it, only the lock icon will appear below the tile.
Inspections	Provides access to a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.

Menu Link	Description
	The number of scheduled and requested inspections appears in the tile label.
Projects	Provides access to a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact. This tile is hidden from users who do not have any projects. The number of active and completed projects appears in the tile label.

The Digital Assistant Button

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

This image shows the digital assistant button.

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

For information on setting the digital assistant button, see *Initializing the Digital Assistant*.

2 Managing Applications for Planning and Zoning

Using the Agency Springboard

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

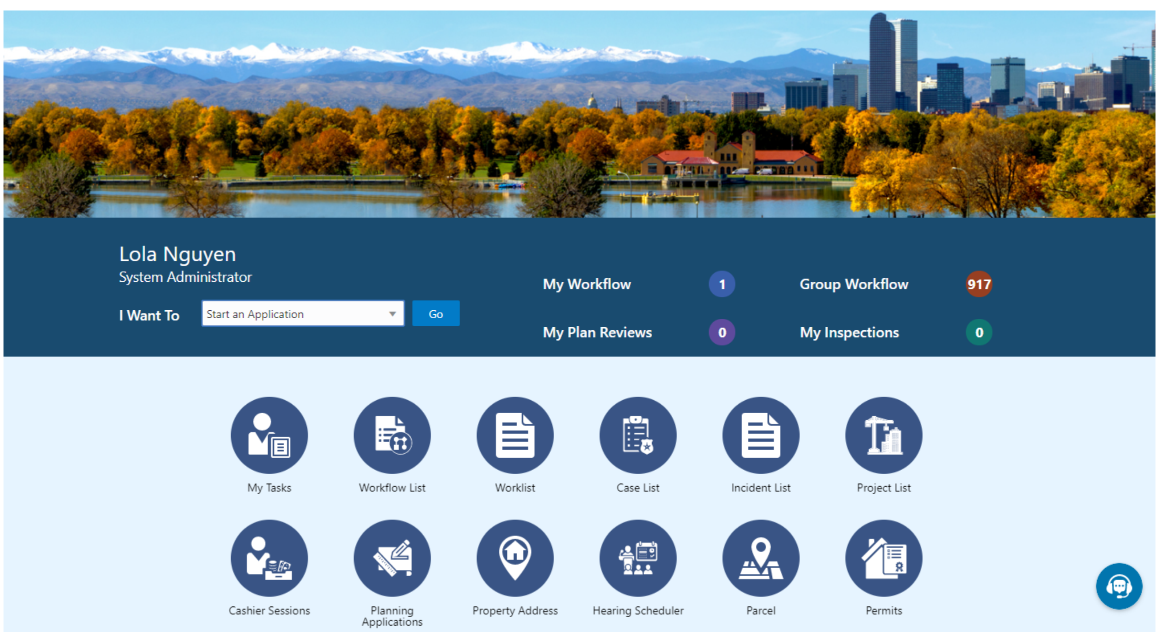
The Agency Springboard offers access to task lists and specific pages based on the staff role in the agency, from supervisors and accounting staff to permit technicians and inspectors.

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

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

Depending on your setup, the Agency Springboard might 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*.

Starting an Application

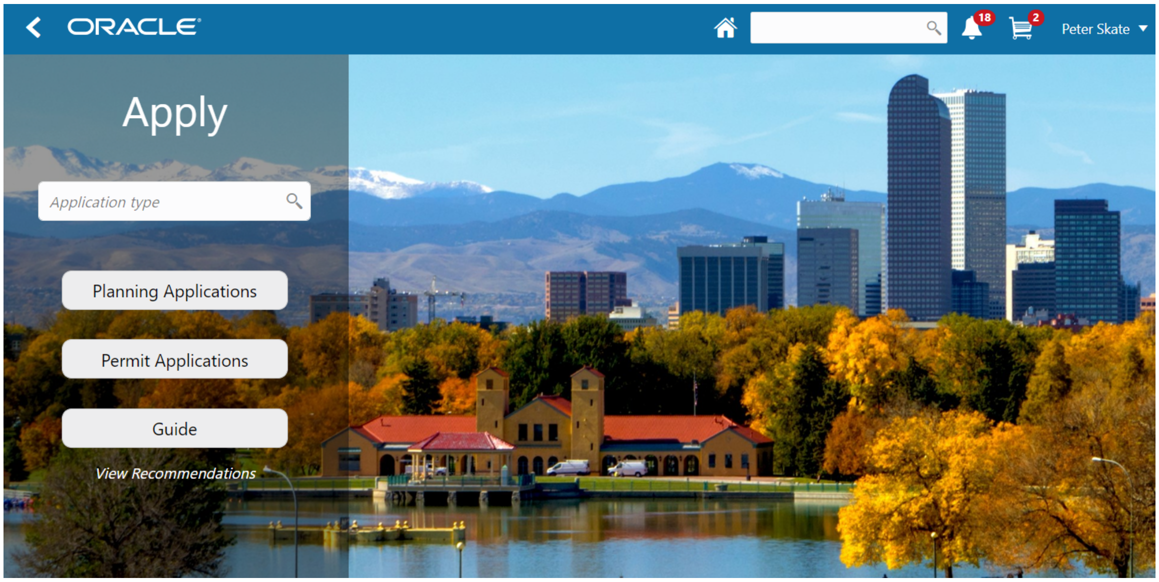
Before starting an application, users must determine the appropriate type of application. Application types, including types of permit applications and types of planning applications, are configured by the agency during implementation. The Apply page provides multiple tools to help users choose the appropriate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

Working With the Apply Page

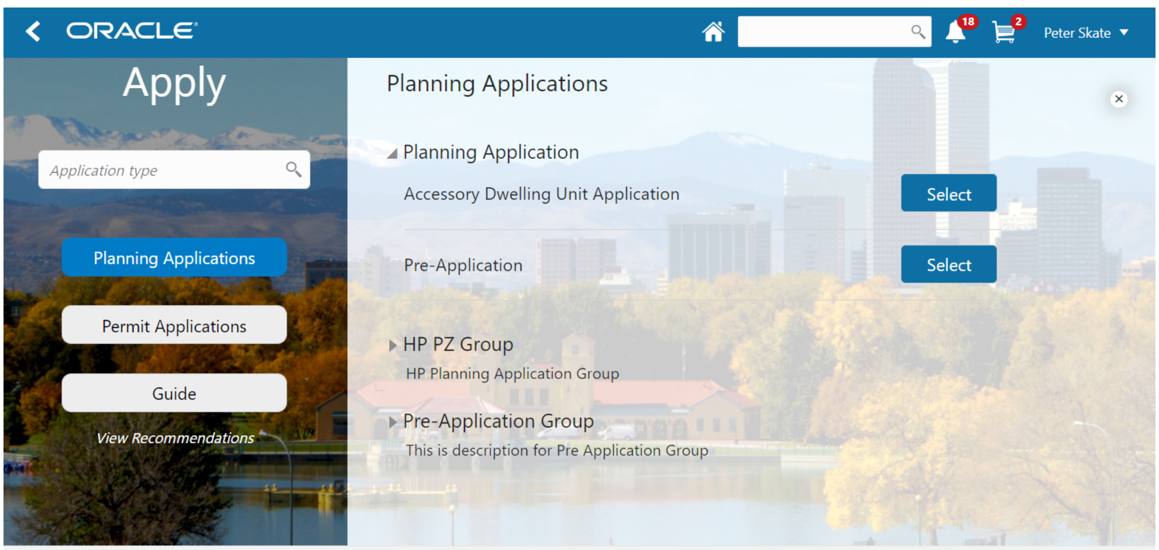
The Apply page offers these options for finding application types:

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

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



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



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

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

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

Accessing the Apply Page

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

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

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

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

Searching for Application Types By Name

To search for an application type by name:

1. Click in the search field.

   A drop-down list shows any matches.
2. If you don't see the desired application type in the initial drop-down list, begin typing the name of the application type.

   As you type, the drop-down list changes to show only application types that match your search criteria.
3. To start an application, click the desired application type in the drop-down list.

Searching for Popular and Recent Application Types

To search for popular and recent application types:

1. Click in the search field.
2. Review these lists of popular and recently used application types.

   The lists appear in the overlay on the right panel of the Apply page.

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

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

Browsing for Application Types

To browse for application types:

1. Click either the **Planning Applications** button or the **Permit Applications** button on the Apply page.

   The overlay on the right side of the page lists categories of application types for the specified transaction type.
2. Expand categories to browse the application types.
3. To start an application, click **Select** for the desired application type.

Using a Guided Questionnaire to get Application Type Recommendations

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

To find application types using a guided questionnaire:

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

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

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

   A registered user follows these steps to save the recommendations:

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

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

   An anonymous user follows these steps to save the recommendations:

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

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

Viewing Saved Recommendations

Public users can view guided questionnaire recommendations that they save.

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

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

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

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

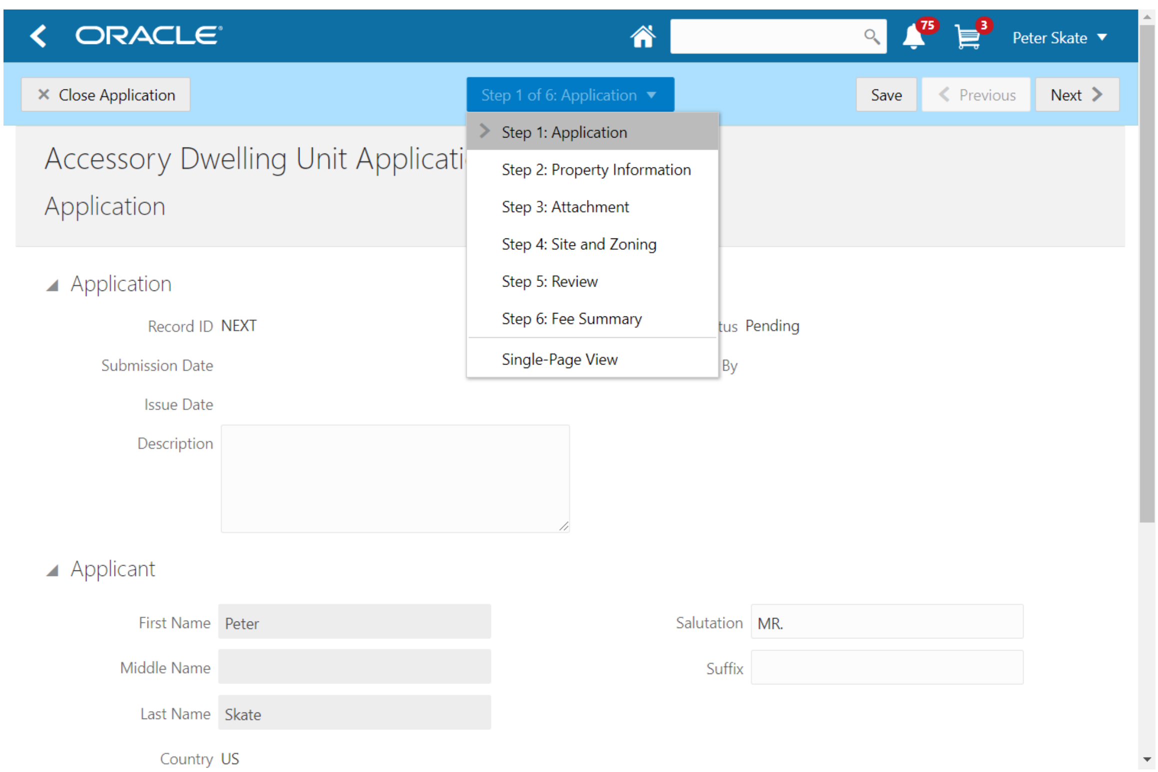
1. Access the Apply page.
2. Locate the **Search Saved Recommendations** link:
   - Anonymous users can find this link in the right frame of the Apply page.
   - Registered users who are signed in must click the **View Recommendations** link in the left panel. The resulting overlay on the right panel includes the **Search Saved Recommendations** link.
3. Click **Search Saved Recommendations** to open a new window.
4. Enter the **Acknowledgement Number** that was emailed to the user when the recommendations were saved.
5. Enter the **Email**that the user provided when saving the recommendations.
6. Click **Search.**

Completing an Application

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

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

This example illustrates an application.



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

- The application begins with data entry steps that the agency configures.

  There can be one or many data entry steps.
- Agencies configure the sections and fields for each data entry step, but all applications include an Applicant section to identify the applicant.

  When a registered public user starts an application, the Applicant section is prepopulated, and certain identifying fields are read-only. Agency staff must manually enter applicant information.
- A Review step appears after the last data entry step for an application.

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

  In single-page view, all of the data entry steps are combined into a single step labeled Step 1: Single-Page View. The Review and Fee Schedule steps remain separate.
- **Previous** and **Next** buttons enable users to move through the steps.
- On the final step, a **Submit** button replaces the **Next** button.

  Submitting an application initiates the workflow for the application. Registered public users can't make changes to an application after it's submitted.
- The **Save** button lets users save their progress without submitting the application.

  If an application is saved without being submitted, the user can continue working on the application later.
- The **Close Application** button closes the application and discards unsaved changes.

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

Managing Transactions

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

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

As agency staff, such as a permit technician or planning and zoning administrator, you can use the Transactions page to view a complete list of applications submitted to your agency. Here are some of the things you can do:

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

- Manually enter fee payments on behalf of applicants.
- Access details about permit and planning application activity.

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

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

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

Using the Transactions Page

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. You can go to a specific type of application on the Transactions page:
   - **Permits**: View a list showing active permit applications only.
   - **Planning Applications**: View a list showing active planning applications only.
   - **All**: View a list showing all permits and planning applications, including inactive, canceled, and withdrawn applications.
3. You can use these actions to display permits or planning applications:

Page Element	Description
Download	Click the download button to export the list to a .csv file.
Search	Search by alphanumeric characters on the fields for permits or planning applications in the list. The permits or planning applications that meet the search criteria are displayed on the page. When you search on dates, use this format: MM/DD/YYYY. Search results display only the primary address for the permit or planning application. You can confirm the correct transaction by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.
Filter By	Apply filters to display permits or planning applications that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters. As a planner, you can also find the planning applications assigned to you or unassigned applications by selecting predefined filters, My Assigned Applications or Unassigned Applications, respectively.

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

Managing Application Activity

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

    Here are some of the information you can look at:

Page Element	Description
Application	View the application ID, application type, and status. Review the application status, for example, Payment Pending, Submitted, Pending, Permit Issued, and so on.
Property	View parcel information. Review the parcel information, including the street address, if available. The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.
Description	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.
Additional Information	Review the user name of the person who filled out the application and the date the application was created. For example, the application was Created by John Doe on 12/20/2018. Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, Applicant: John Doe. View expiration notifications. For example, Expires in 1 day or Expired on 10/01/2019.
Planner	View the planner assigned to a planning application. This field appears only on the **Planning Applications** list.
Fees	Review the total fees that may be applicable to the permit or planning application and a fee balance if the total has not been paid.
	Select the **Pay** button to submit a payment on behalf of the applicant.
	Select the **Resubmit** button to resubmit an application. The application status is Pending Submit because there may be a problem initiating workflow. Click the **Resubmit** button to retry initiating workflow. Resubmitting the application does not affect the fee calculations.

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

Identifying Transactions Page Icons

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

Icon	Description
	Indicates that there was an error during the submittal process and the application status is pending submittal. There may be a problem initiating workflow. Click the **Resubmit** button to retry initiating workflow.
	Indicates that the permit or planning application is part of one or more projects. For more information, see *Viewing Project Summaries*.
	Indicates the planning application is classified as a pre-application.
 (Hold)  (Lock)  (Notice)	Indicates that a condition has been placed on the application. The agency sets up conditions. For more information about conditions, see *Applying Conditions to Applications*.

Starting or Updating an Application

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

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

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. To create a new application, click **Apply** on the Transactions page to access the questionnaire and submit the application.

3. To update an existing application, click the row for the selected application to open the pages comprising the details.
4. Go to the page for the information of the existing application that you would like to update, using the links in the left navigation panel. The actions vary by your role and the specific page.

For more information, see *Starting an Application*.

Canceling a Pending Application

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

For more information about canceling a pending application, see *Canceling an Application*.

Entering Application Fee Payments

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

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

For paying fees from the Fees and Payments page in the application details, see *Working with Fees and Payments*.

Accessing Application Details

You can access application details from the Transactions page.

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

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

For more information about the overview of permit details, see *Viewing the Permit Summary*.

For more information about the overview of planning application details, see *Viewing the Planning Application Detail Overview*.

Canceling an Application

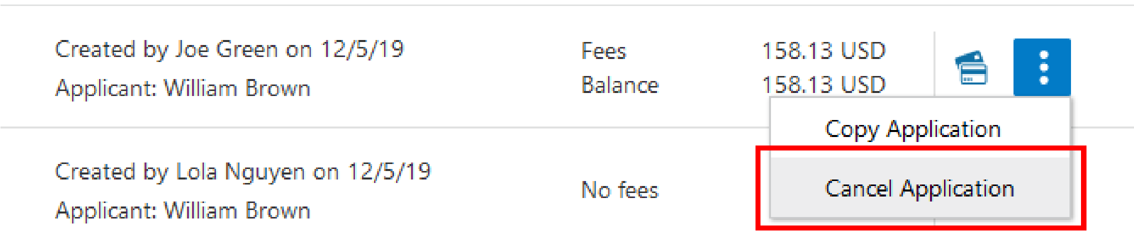
Agency staff and applicants can cancel applications in a pending or payment pending status that have not yet been submitted.

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

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

For information about withdrawing an application that was submitted and is already in progress, see *Withdrawing an Application*.

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



Canceling Pending Applications

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

Let's go through the steps to cancel an application:

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

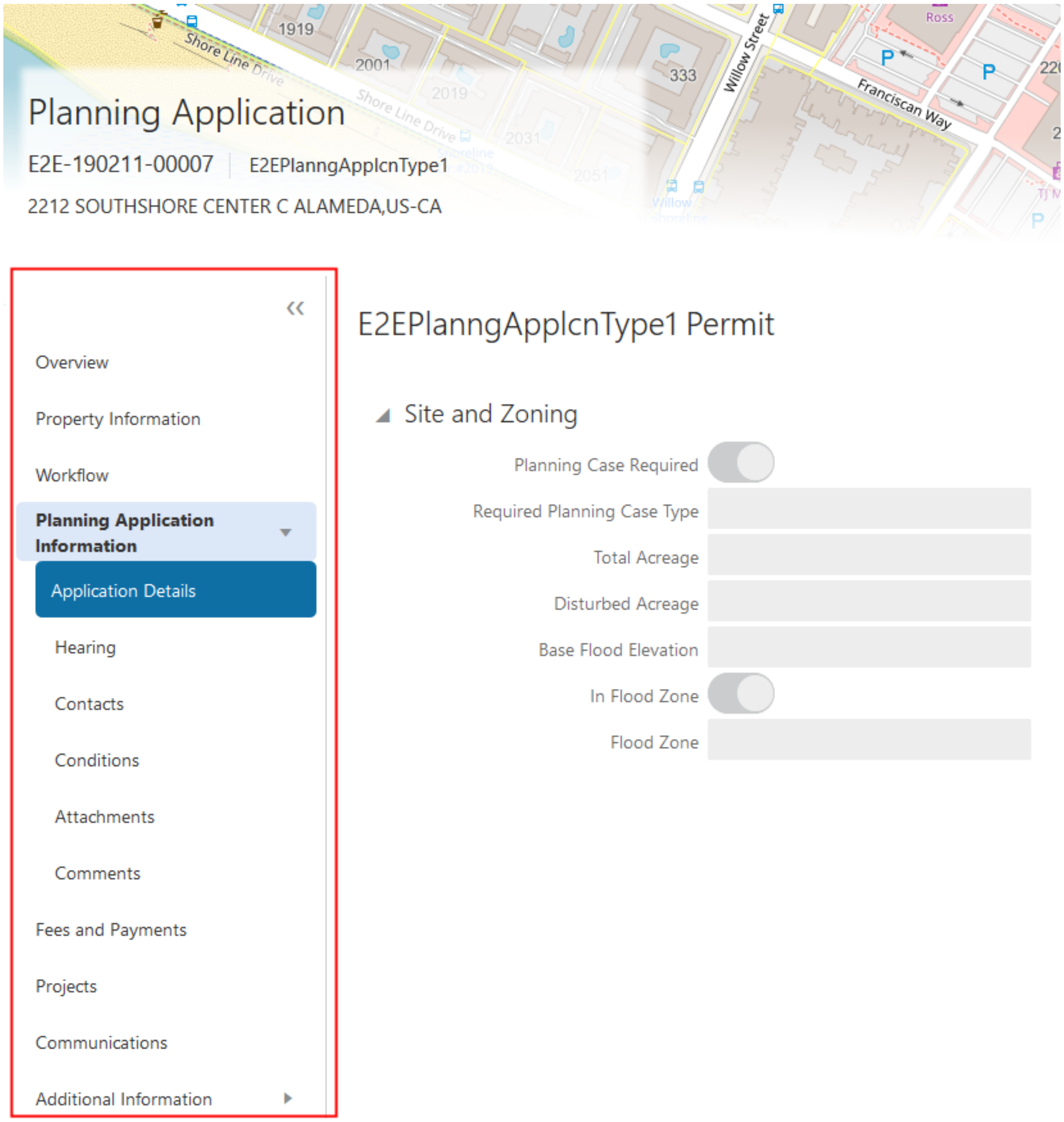
Note: When you cancel an application, the system also cancels any plan reviews that are associated with the application.

Navigating to Planning Application Details

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

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

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



To access the planning application detail pages:

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

The information for a planning application comprises these pages:

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

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

Page Name	Description
Communications	View a list of communications associated with this planning application and send ad hoc email messages and notifications. See *Working with Ad Hoc Communications* and *Working with Application Communications*.

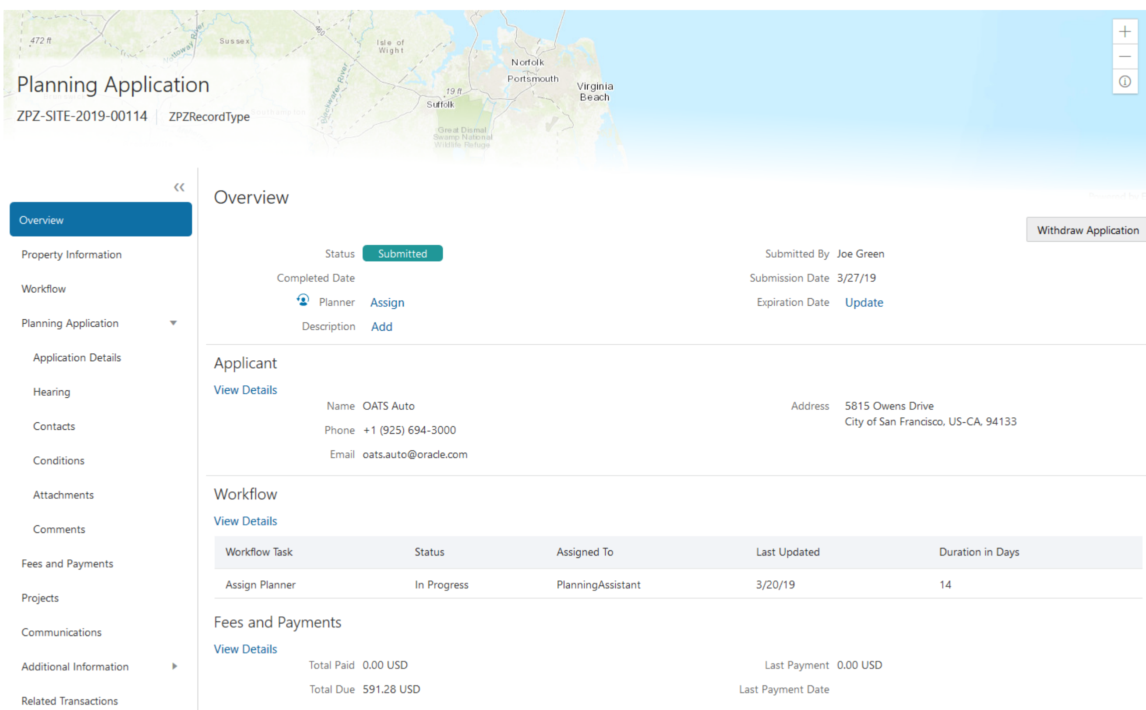
Viewing the Planning Application Detail Overview

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

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

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

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



Using the Overview Page

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

Page Element	Description
Status	Review the application status.
Completed Date	Review the date the application was completed.
Planner	Review the name of the planner assigned to the planning application. Only agency staff can assign or reassign a planner to the application by clicking the **Assign** or **Reassign** link, respectively. Click the **Planner Assignment History** icon next to the **Planner** field to view a history of planner assignments.
Description	Enter a description of the application by clicking the **Add** link in the **Description** field. The agency staff or applicant can add a description.
Submitted By	Review the name of the person who submitted the application.
Submission Date	Review the date the application was submitted for processing.
Expiration Date	Review the expiration date of the application. If the **Extend** link is available next to the **Expiration Date** field, agency staff can enter a new expiration date that allows more time before the application expires. Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the planning application type, you might see a notification that the application expires in the displayed number of days. For more information about working with application expiration, see *Application Expiration Overview* and *Working with Application Expiration*.
Withdraw Application	Click the **Withdraw Application** button to change the application to a withdrawn status. When you withdraw an application, any scheduled pre-application meetings or public hearings are canceled. For more information about withdrawing an application, see *Withdrawing an Application*.

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

Page Element	Description
Applicant	View the applicant's name and contact information. Click the **View Details** link to open the Contacts page. For more information about contacts, see *Adding Contacts to Applications*.
Workflow	View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status. Click the **View Details** link to open the Workflow page. For more information about workflow, see *Using Workflow*.
Fees and Payments	View the total fees paid, amount due, and the date and amount of the last payment. Click the **View Details** link to open the Fees and Payments page. See *Working with Fees and Payments*.
Projects	View the projects to which this permit or planning application belongs. Click the **View Details** link to open the Projects page, where you can see the list of projects in more detail. Click the **Project ID** link to find out more about the project, which may contain other permits or planning applications. See *Viewing Project Summaries*. The Projects section is available only when the permit is associated with a project.

Withdrawing an Application

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

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

You can withdraw permit applications with one of these statuses:

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

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

- Submitted
- In Progress
- Hearing

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

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

The system status of the application changes to Withdrawn.

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

Withdrawing In-Progress Applications

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

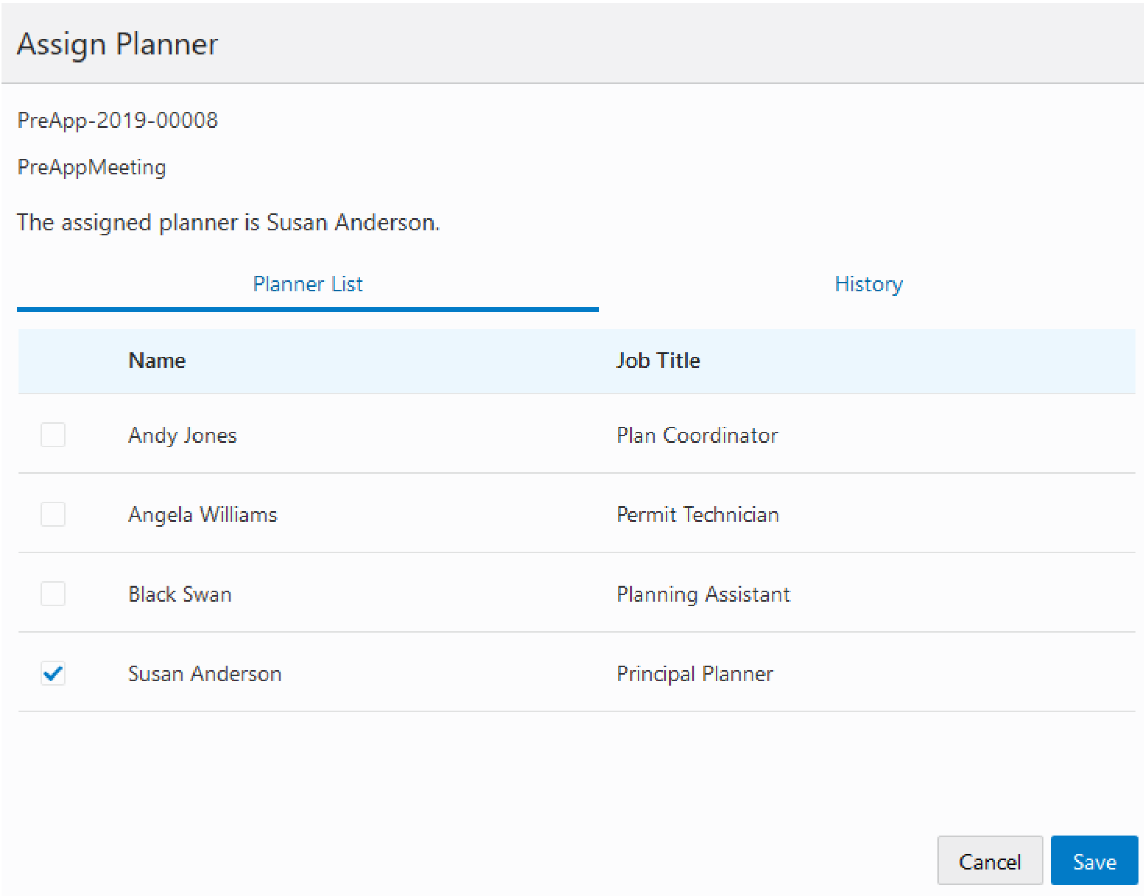
To withdraw an application:

1. Select **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application that you want to withdraw.
3. On the Overview page, click the **Withdraw Application** button.
4. On the Withdraw Application page, enter the reason for withdrawing the application.
5. Click **OK**.

Working with Planners

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

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



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

Assigning a Planner

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

   If a planner has already been assigned, you can click the **Reassign** link to select a different planner.
4. Select the check box for the planner to assign them to the planning application.
5. Click **Save** to save your selection.

Viewing Planner Assignment History

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

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

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

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

Related Topics

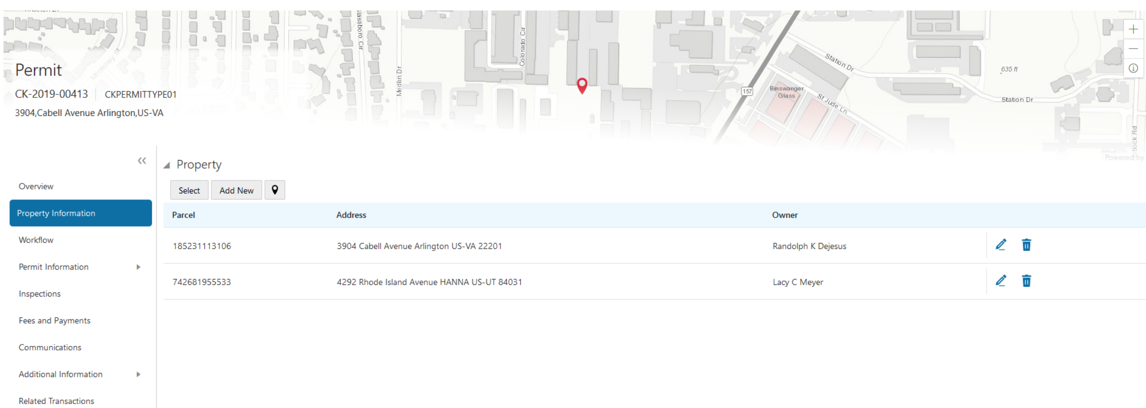
- Viewing the Planning Application Detail Overview

Working with Property Information

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

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

This example shows the Property Information page.



Viewing Property Information

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.

   The Property Information page displays a list of properties associated with the application.

4. Click a row to view detailed parcel, address, and owner information for the property on the Property Information modal page.

Adding New Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. Click **Add New**.
5. Enter parcel, address, and owner information on the Property Information modal page.

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

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

Adding Existing Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. Click the **Search Property** icon.
5. On the Map View modal page, search for the property that you want to add and click it.
6. On the Search Property modal page, select the check box next to each parcel of the property that you want to add.
7. Click **Add Selected**.

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

Adding a Parcel from the Map View

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. Click the **Search Property** icon.
5. Use map tools such as searching or zooming to locate the parcel on the map.
6. Click the parcel.

   The map closes, and the Search Property window opens. The system searches properties using the parcel ID provided by the map service, so the list of search results shows the parcel that you selected.
7. Select the check box for the parcel.
8. Click **Add Selected**.

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

Modifying Property Details

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. Click the **Edit** button next to the property that you want to modify.
5. Update parcel, address, and owner information on the Property Information modal page.
6. Click **Save**.

Deleting a Property

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. On the Property Information page, click the **Delete** button next to the property you want to remove from the application.
5. Click **OK** to confirm the deletion.

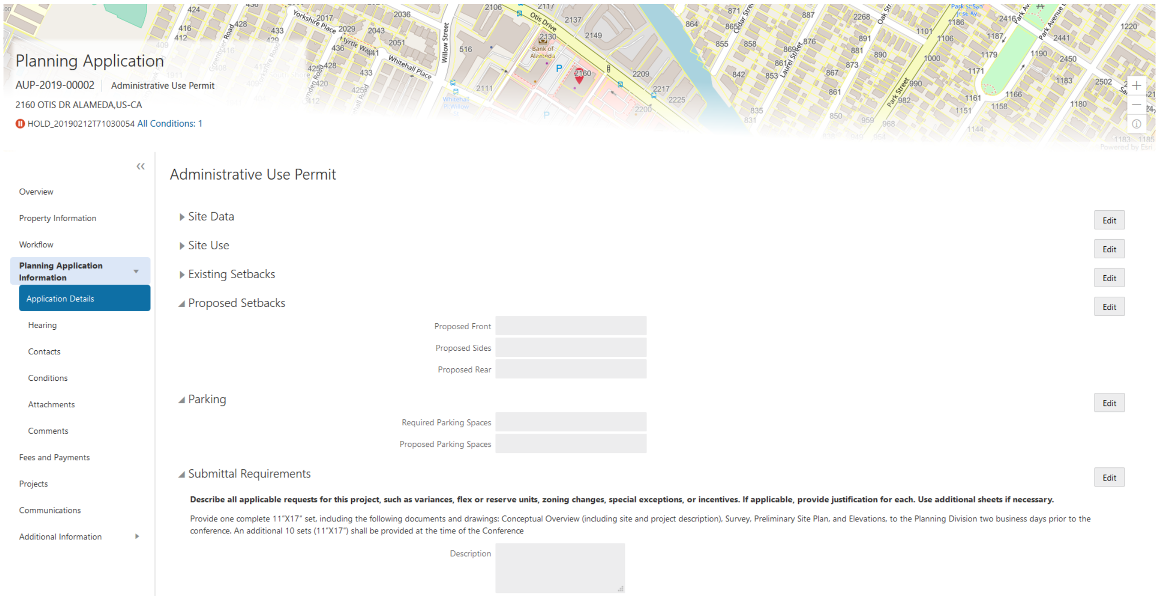
Note: Deleting a property automatically deletes any associated property conditions that are applied to the permit or planning application you are working with.

Viewing Application Information

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

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

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



Updating Application Details

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

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

Using Workflow

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

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

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

Workflow and Non-Workflow Tasks

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

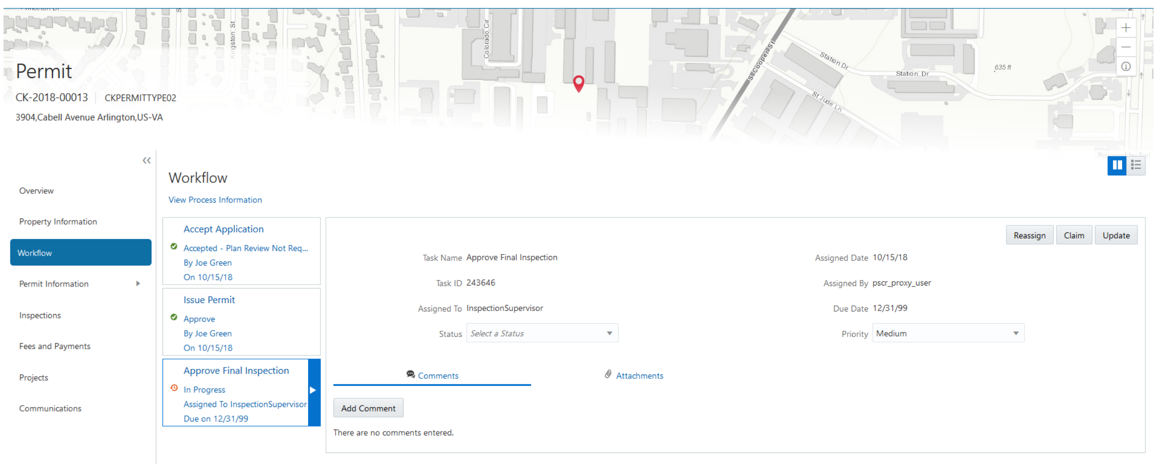
Oracle provides an additional page that agency staff can use to review both workflow and non-workflow tasks. For information about this functionality, see *Managing Tasks*.

Managing Workflow Tasks

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

Access the Workflow page by clicking the Workflow tab.

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



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

To manage a workflow task:

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

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

Panel	Description
Task summary cards on the left.	The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information: ◦ Task name

Panel	Description
	◦ Task status Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always In Progress. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks. ◦ Assignee Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task. ◦ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	The right panel displays more details for the task that is selected in the left panel. If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments. Completed tasks are not updatable, but you can add comments to them.

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

   These fields can't be updated regardless of the task status:

Page Element	Description
Task Name	The task name as defined in the OIC workflow engine. For example, the Application Acceptance task is for reviewing and accepting a permit or planning application that has been submitted.
Task ID	The identifier for this specific instance of a task. For example, multiple permits or planning applications have an Application Acceptance task, but the Task ID for accepting the application is unique for each permit or planning application.
Assigned To	The name of the individual who is assigned to the task, or, if the task isn't assigned to an individual, displays the name of the group or role that is responsible for the task.
Assigned Date	The date that the task assignment was last updated.
Assigned By	The name of the person who last updated the task assignment. When an assignee claims a task, the Assigned To and Assigned By names are the same.
Due Date	The date by which the task must be completed. The workflow process definition in OIC sets the due date. Generally the due date is defined as a specific amount of time after the task is started.

Page Element	Description

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

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

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

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

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

When you save your changes, the system does the following:
  - Sends an update to the workflow engine in OIC, triggering any subsequent tasks in the workflow.

    For example, in a delivered sample workflow, approving a permit application triggers an update to the permit status, which triggers an email to the applicant. The workflow then reaches a decision point that checks whether a plan review is required. The next human step in the process is either completing a plan review or, if no review is required, issuing the permit.
  - Refreshes the Workflow page, which becomes read-only if the task is complete.
  - Displays a **Refresh** icon on the read-only page so that you can check if any new human workflow tasks get triggered.

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

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

Adding Comments to a Workflow Task

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

For more information about comments, see *Working with Comments*.

To add a comment to a task:

1. Access the workflow task.
2. Click **Add Comment.**
3. To write a new comment from scratch, enter and format your comment in the rich text field on the page.
4. To create a new comment based on one or more existing comments:
   a. Click **Select Comments.**
   b. On the Select Comments page, click **Favorite, Standard,** or **Recent** to see the corresponding list of comments.

      Favorite, standard, and recent comments are described in the topic *Working with Comments*.
   c. Locate and select the comments you want to copy, using the search and filter options as needed.
   d. Click **Insert** to copy the text of the selected comments into the field for the new comment.
   e. If necessary, modify the copied text.
5. If you want to hide the comment from public users, click the **Hide from Public** icon to toggle the visibility setting.

   When the icon displays an open lock, the comment is visible to the public. This is the default setting for new comments.

   When the icon displays a closed padlock, the comment is hidden from the public.
6. Click **Save** to save the comment and return to the Workflow page.

Modifying a Comment in a Workflow Task

To modify a comment:

1. Access the workflow task.

2. Click an existing comment to view it on the Comment page.
3. Modify the text of the comment as needed.
   if you use the **Select Comment** option to add text from an exiting comment, the new text is added after any existing text.
4. To modify the comment visibility, click the **Hide From Public** icon.
   Clicking the icon toggles the setting. When the icon displays an open lock, the comment is visible to the public. When the icon displays a closed padlock, the comment is hidden from the public.
5. Click **Save** to save changes and return to the Workflow page.

Deleting a Comment from a Workflow Task

To delete a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Click the **Delete** icon.
   The comment is deleted, the window closes, and you return to the Workflow page.

Managing Attachments for a Workflow Task

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

To manage attachments for a workflow task:

1. Access the workflow task.
2. Click the **Attachments** link to display attachments information.
   The **Attachments** link and **Comments** link toggle the display between task comments and task attachments. In Attachments view, a grid displays the **File Name,** a **Description,** and the **File Size** for each attachments.
3. To add a new attachment:
   a. Click **Add.**
   b. Select a file using your browser's file selection window.
   c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description.**
   d. Click **Upload.**
      When the upload is complete, the new attachment appears in the workflow task details.
4. To view or modify attachment information:
   a. Click the **Actions** icon for the existing attachment.
   b. Select **View Details.**
   c. On the Attachment page, review the **File Name, File Size,** and the **Last Updated By** and **Uploaded By** user names.
   d. Optionally update the **Description.**
   e. Click **Save** or **Cancel** to return to the Attachments page.
5. To download a file, click the **Actions** icon and select **Download.**
6. To delete a file, click the **Actions** icon and select **Delete.**
   You are prompted to confirm the deletion.

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

Viewing the Overall Workflow for an Application

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

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

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

To use the list view:

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

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

     The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.
   - **Comments,** which displays the two most recent comments.

     For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.
6. To review task history, click a specific task to open the Task Details page.

   This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.
7. Close the Task Details page to return to the workflow list view.

Altering Workflow

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

To alter workflow:

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

- **New Workflow Activity Name:** Select the desired workflow step.
- **Update Transaction Status:** Select the proper status for the workflow step.
- **Comments:** It is recommended to note who made the change and describe the circumstances requiring the manual intervention.

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

6. Click **Save.**

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

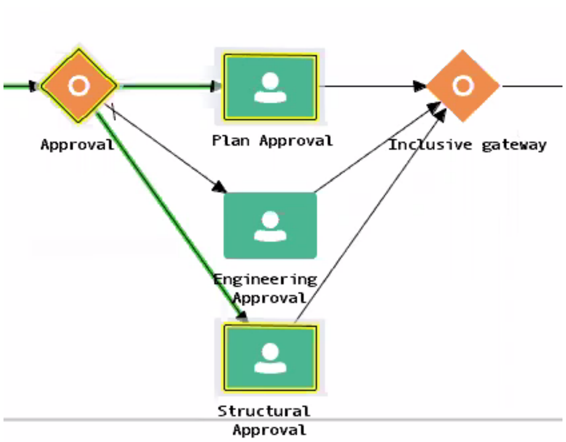
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- Do not depend on each other to be completed.
- Can be completed simultaneously.

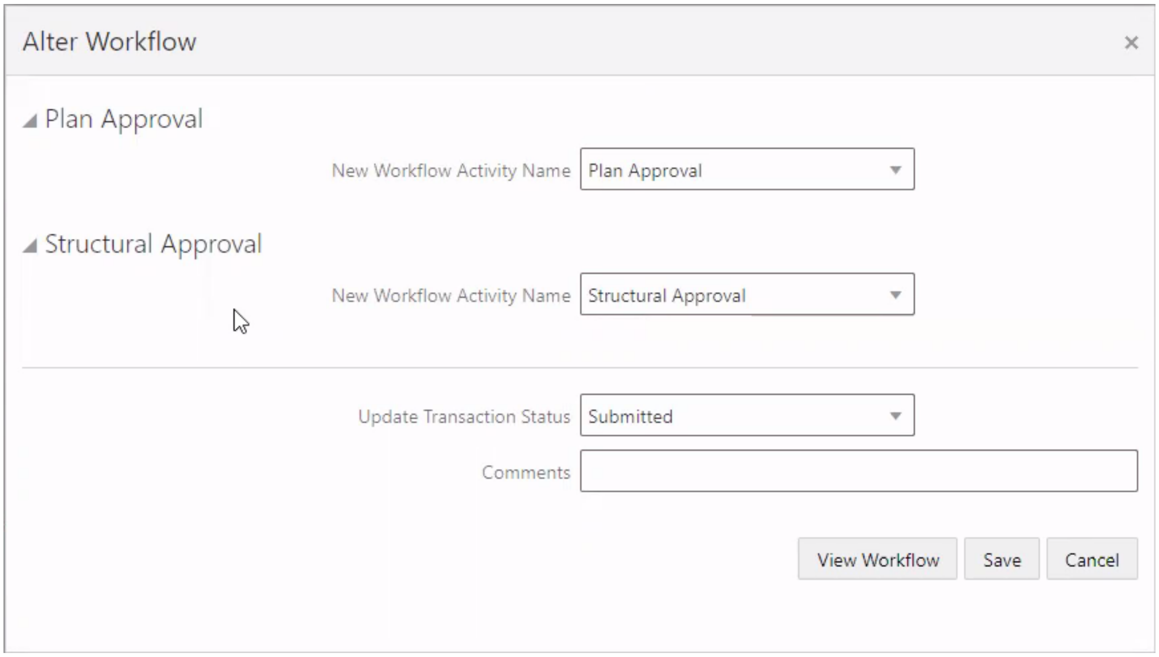
In the case of parallel tasks, the Alter Workflow tab displays each applicable parallel task for you to alter the workflow status accordingly for each.

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

This example illustrates a workflow process definition with parallel tasks.



This example illustrates the Alter Workflow tab displaying parallel tasks.



Managing Tasks

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

Application-related tasks include workflow tasks related to the transactions your agency is processing. For example, tasks can be associated with:

- permit lifecycle
- inspections
- plan reviews
- planning application lifecycle

Reviewing and Managing Tasks

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

Task Tab	Description	Available Actions
My Workflow	Lists tasks that are assigned to you.	Release Reassign
Group Workflow	Lists workflow tasks that are assigned to a group to which you belong. Non-	Claim Reassign

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

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

Page Element	Description
Task Type	Identifies the nature of the task to be performed. Values include: ◦ Inspection ◦ Plan Review ◦ Workflow The Workflow task type represents overall transaction workflow.
Transaction	Displays the transaction type number. For example, in the case of a permit, it displays the permit number and permit type for the associated permit.
Tasks	Displays a task name and identifier that depend on the task type: ◦ For workflow tasks, the workflow process name and task ID appear. The task ID is for the specific instance of the task. ◦ For inspection tasks, the inspection name and ID appear. ◦ For plan review tasks, the plan review name and cycle count appear.
Status	Displays the task status. Different types of tasks can have different statuses. For example, inspection tasks can have the status Scheduled, which is not applicable to permit workflow tasks.

Page Element	Description
Assignment	Displays the date that the task assignment was last updated and to whom the task is assigned.
>	Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.

5. To update the task assignment, select one of these options from the task's **Actions** menu:
   - **Claim** assigns the task to yourself. This action is available only for tasks that are currently assigned to a group. Once a task is claimed, it appears under the tab you find your tasks, such as My Workflow.
   - **Release** removes the assignment without assigning a new owner. The task will now appear on the Group Task list until it is claimed or reassigned.
   - **Reassign** opens the Reassign Task page, where you can select a new assignee.

Reassigning a Workflow Task

To assign a task to someone else, use the Reassign action.

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

To reassign a workflow task:

1. On the agency springboard, click the **My Workflow** tile.
2. Locate the workflow task on either the **My Workflow** list, the **Group Workflow** list, or the **All Workflow** list.

   Use the search, filter, and sort options to help you refine the task list.
3. Click the **Actions** icon, and then select **Reassign.**

   The Reassign Task page appears.
4. Confirm that the **Search By** value is User.
5. Enter your search criteria, then click **Search.**

   You can search by **Keyword, First Name, Last Name,** and **Email.**
6. Locate the desired assignee in your search results, then click the **Select** button for that assignee.

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

Working with Pre-Application Meetings

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

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

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

Scheduling a Pre-application Meeting

Planners schedule pre-application meetings on the Pre-application Meeting Request page. Applicants can also schedule a meeting depending on the scheduling configuration on the Manage Pre-Application Meeting Configuration page. See *Managing Pre-Application Meeting Configuration*.

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

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

Page Element	Description
	Note: Only planners can change the location of the meeting.

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

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

Viewing Pre-application Meetings

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

Agency planners can use the Planning Calendar page to view all the pre-application meetings scheduled at the agency level or just view their own meeting schedules. The following sections detail the two ways of viewing the meeting schedules.

Viewing Pre-application Meetings on the Pre-application Meetings Page

To view pre-application meetings :

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

Page Element	Description
Meeting Date	View the date of the scheduled meeting.
Meeting Start Time	View the start time of the scheduled meeting.
Meeting Duration in Hours	View the duration of the scheduled meeting.
Meeting Location	View the location of the scheduled meeting.
Meeting Status	View the status of the meeting, such as Canceled or Scheduled.
Reschedule	Click to open the meeting request page and select a new date and time for the meeting. See the section Rescheduling a Pre-application Meeting.

Page Element	Description
Cancel	Click to cancel the scheduled meeting.
	Click to view the details of the scheduled meeting. **Note:** Planners can change the agenda and location of the meeting.

Viewing Pre-application Meetings on the Planner Calendar

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

1. Select the **Planner Calendar** tile on the Agency Springboard.
2. On the Planner Calendar page you can view the details of the meeting schedule such as the location, and use a link to access the pre-application.
3. On the Planner Calendar page you can perform these actions:

Page Element	Description
View	Select one of the options to view the pre-application meeting schedules: ◦ My pre-applications (Default) ◦ All pre-applications
	Select to view the meeting schedules on a calendar. You can choose to view the calendar by month, week, or day. This view is the default selection.
	Select to view the meeting schedules in a list format, with the current meeting displayed at the top followed by the future schedules. You use the Filter option to search the past and future meeting schedules. Use the Sort By and Search options to refine your search results.

Rescheduling a Pre-application Meeting

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

1. Select **Planning Applications** on the Agency Springboard.
2. Click the **View Details** button for an application to access the application details.

3. Click **Planning Application Information**in the left panel.
4. Click the **Meetings** link to view the Pre-application Meetings page for the application.
5. On the record of the meeting you want to reschedule, click the **Reschedule** button.
6. On the Pre-application Meeting Request page you can select a new available date and time for the meeting.:

   > **Note:** Planners can edit the agenda and location of the meeting.

7. Click **Schedule**.

   The Pre-application Meeting page now lists the newly scheduled meeting record and the previous meeting record shows with a status of Canceled.

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

Canceling a Pre-application Meeting

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

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

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

Notification and Email Correspondence

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

Working with Review Summary

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

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

Adding a Required Application

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

1. Select **Planning Applications** on the Agency Springboard.

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

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

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

Adding a Review Comment

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

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

Viewing the Review Summary

To view the summary information:

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

Page Element	Description
Application Type	View the type of application required.
Status	View the status of the application type. For example, Not Started and Inspection. The Not Started status Indicates that no application has been created or linked for the identified application type.

Page Element	Description
Comments	View the comments included by the planner regarding the application type.
Action	Select an action you want to perform on the transaction: ◦ Link Application ◦ Create Application ◦ Edit Comments (Available only to Planner) ◦ Delete (Available only to Planner) **Note:** The options available in the **Action** menu depend on the user logged in. For details on the Action links, see the next section - Performing Actions for Required Applications.

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

Performing Actions on Required Applications

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

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

Page Element	Description
Link Application	Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click **Save**. The Review Summary page now lists the application you just selected. You can click the application link to open the Overview page of the planning application. The Action menu for the row allows you to: ◦ Remove the link from the application by using the **Remove Application Link** option. ◦ Edit the comments you have entered by using the **Edit Comments** option, which opens the Required Application page. This option is available only to the planner.

Page Element	Description
Create Application	Click to open the Create Application page. The system automatically populates the application form with values copied from the applicant's pre-application. You can make changes and save or submit the application. Navigate to return to the Review Summary page, click **Action** and then select **Link Application**. Select the application you just created and click **Save** to return to the Review Summary page.
Delete	Click to delete the application row.

Working with Public Hearings

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

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

Viewing Public Hearing for a Planning Application

To view a public hearing:

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

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

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

Page Element	Description
Hearing Date	View the date on which the hearing is scheduled. If there is no date displayed, the hearing is in the Not Scheduled status. You can schedule a hearing for your application using the **Schedule** option under the **Action** menu.
Hearing Body	View the hearing body that will evaluate the application.

Page Element	Description
Schedule Status	View the status of the schedule: ◦ Not Scheduled ◦ Tentative ◦ Final ◦ Canceled
Hearing Status	View the status of the hearing: ◦ Not Started ◦ Completed
Hearing Decision	View the decision made by the hearing body.
Action	The options under this menu is determined by several factors such as the user logged in, the schedule status, the hearing status, and the hearing decision. For details about the **Action** menu, see the section Finalizing the Hearing.

Scheduling and Finalizing a Public Hearing

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

- Select the **Hearing Scheduler** tile on the Agency Springboard and then select the application for which you want to schedule a hearing.
- Access the application for which you want to schedule a hearing and then add a hearing using these steps:

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

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

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

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

Using the Hearing Scheduler Page

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

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

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

Finalizing the Hearing

You use the **Actions** menu to finalize the hearing schedule. You can finalize the hearing schedule by selecting the application's action on the Hearing Scheduler page or on the Hearings page. The **Actions** menu on the Hearing Scheduler page also allows you to perform the following:

- View the application.
- Reschedule the hearing.
- Cancel the hearing schedule.

Performing Actions

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

Page Element	Description
Edit	Click to change the hearing decision, based on the decision made by the hearing body. The values in this field are configured by your system administrator on the Hearing setup page.

Page Element	Description
Cancel	Click to cancel the hearing. The date will be made available for the other hearing schedules. This option is available based on the access permissions for the user logged in.
Finalize	Click to finalize the date you selected at the time of scheduling.
Reschedule	Click to open the Reschedule page in which you can change the schedule status and select a new hearing date for the hearing.
Generate Notifications List	Click to open the Generate Notifications List page that allows you to download a report containing the addresses within a given geographic radius. You can use the Mail Merge tool to send post cards to the selected addresses. See *Generating a Hearing Notifications List*.
Continue	Click if it was decided to continue the hearing. A new hearing record will be created with the same hearing body and with a schedule status Not Scheduled. You schedule the new hearing using the Schedule option under the Action menu.
Request Appeal	Click to escalate the application to the next higher hearing body in its hierarchy. The system automatically creates a new schedule with the next higher hearing body and with the schedule status – Not Scheduled. You manually schedule a date for the new hearing. **Note:** The hearing decision made by the highest hearing body in the hierarchy is the final. The option to appeal is not available for the particular hearing. See the next section for details on requesting appeal.

Requesting an Appeal

Registered public users can request an appeal for the hearing decision they received on their application by contacting the agency staff. Agency staff request an appeal on behalf of the registered public user using the Community Development service. Registered public users can only view the details of the appeal on the Hearings page.

Agency staff use the Hearings page to request an appeal:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application you are working with.
3. On the Planning Application page, click **Planning Application Information** in the left panel.
4. Click the **Hearings** link under **Planning Application Information** to view the Hearings page.
5. Click the **Actions** icon on the hearing row for which you want to appeal and select the **Request Appeal** option.

   > **Note:** This option is available only after a decision is taken by the hearing body and the same appears on the hearing row. You can see a text In appeal period, indicating that you can request an appeal.

6. On the Request Appeal page, enter details for the following fields:

Page Element	Description
Select Appellant	Click to search and select the appellant.
Reason for Appeal	Enter a reason for the requested appeal.
Attachments	Click the **Add** icon to browse and select a document attachment.

7. Click **Confirm** to submit the appeal request and return to the Hearings page. The hearing row displays a confirmation text — Appeal submitted

   The system automatically creates a new schedule with the next higher hearing body and with the schedule status – Not Scheduled. You manually schedule a date for the new hearing. See the section Scheduling and Finalizing a Public Hearing.

Viewing an Appeal Request

Agency staff as well as registered public users can view the appeal requests that are created for their application

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application you are working with.
3. On the Planning Application page, click **Planning Application Information** in the left panel.
4. Click the **Hearings** link under **Planning Application Information** to view the Hearings page.
5. On the hearing row for which you want to view the appeal request, click the **Actions** icon and select **View Appeal Request**.
6. View the details of the appeal request on the Request Appeal page.

Generating a Hearing Notifications List

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

You generate hearing notifications on the Public Notification page. The following steps provide hearing-specific navigation instructions followed by the standard steps for generating recipient lists for public notifications.

To generate a hearing notification list:

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

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

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

   The Generate Notifications List window appears and displays the Public Notification page. This page shows a map on which the parcel or parcels from the planning application are selected. Selected parcels appear as solid blue shapes.

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

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

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

   In brief, the two selection methods are:

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

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

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

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

9. Click **Apply.**

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

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

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

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

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

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

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

    The notification process is not part of the Oracle system.

Adding Contacts to Applications

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

Adding Contacts to an Application

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

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

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

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

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

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

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

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

2. Click **Add New Contact** to open the Contact Details page and include a new contact. The Contact Details page lists all the registered contacts. The **Create New Contact** button below the Contacts grid allows you to create a new contact and include it in the transaction.

   - To add a registered contact, select a contact from the Registered Contact list. A modal window opens, allowing to select the Contact Type and the Primary flag.

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

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

Applying Conditions to Applications

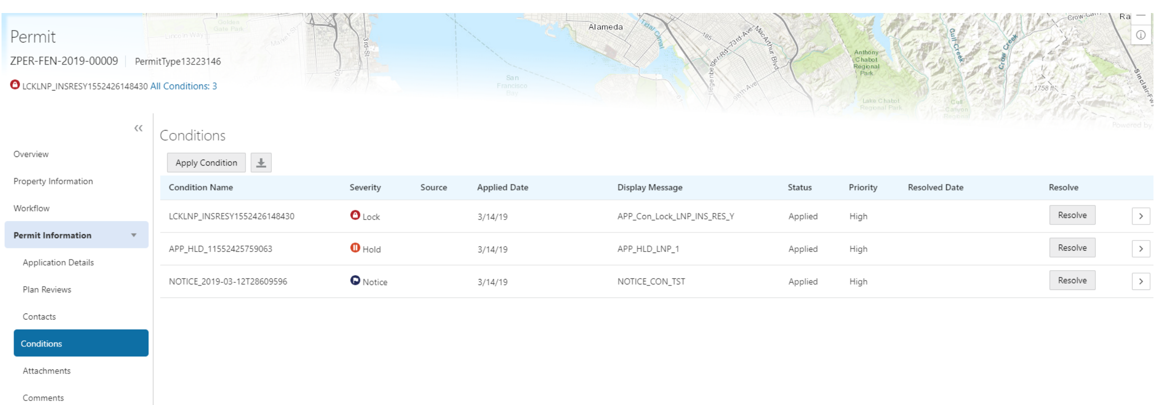
This topic describes how your Public Sector Community Development service allows you to view, update, apply, and resolve conditions on an application such as a permit or a planning application.

Viewing and Updating Conditions

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

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

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** .page, select **Conditions** under **Permit** or **Planning Application Information**.
   The Conditions page lists all the conditions applied to the transaction .
   This example illustrates the Conditions page.



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

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Applying a Condition to a Transaction

You apply conditions to transactions on the Apply Condition page.

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

Page Element	Description
Condition Name	Select a condition from a list of conditions that are enabled in setup.
Severity Lock	Displays the level of severity as defined while setting up the condition: At the most severe level, the Lock condition suspends all operations, including workflow advancing, payment processing, inspection scheduling, and inspection results.
Severity Hold	Agency staff can select which rules to apply to conditions with this level of severity.
Severity Notice	This level functions as an alert and has no effect on operations.
Business Rules	Select one or more business rules. Options are: ◦ Prevent New (applicable to a parcel) ◦ Prevent Workflow Advancing ◦ Prevent Issue or Final ◦ Restrict Payment ◦ Prevent Inspection Schedule ◦ Prevent Inspection Result **Note:** The business rules available for selection are based on the severity of the condition you have selected. For example, for a condition whose severity is Hold you must select at least one business rule, and for a condition with Lock severity, all the business rules are automatically applied. For more details on the business rules, see *Setting Up Conditions*.

Page Element	Description
Additional Information	Enter additional information regarding the condition applied to the transaction.
Display Message	Displays the message on the Conditions list page as well as on the condition indicator at the top of the page, when you click the **All Conditions** link.
Priority	Select a priority from options High, Medium, and Low.
Description	Displays the description as entered while setting up the condition. You can change the text here and the condition description is updated when you save the condition.
Applied By	Displays in view mode, the name of the user who applied the condition, or as **System** if the condition is inherited.
Applied Date	Displays in view mode, the date on which the condition was applied.

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

Resolving a Condition

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

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

   Select the condition that you want to resolve and click the **Resolve** button to open the Resolve Condition page.
2. Enter a resolution text in the Resolution Action field and click **Save**. The resolution is applied and the resolved condition is listed at the bottom of the condition list.

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

Viewing a Resolved Condition

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

1. Select **Permits** or **Planning Applications** and select a transaction row. On the **Permit** or **Planning Application** .page, select **Conditions** under **Permit** or **Planning Application Information**.
2. Select a row with a status of **Resolved** and click **View Details**.
3. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
   - Applied By
   - Resolution Action

- Resolved By
- Resolved Date

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

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

Page Element	Description
	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. **Note:** This field in not available for case and incident attachments.
Actions	Click the actions icon to select and perform an action: ◦ View Details ◦ Download ◦ Delete **Note:** For permits, the Delete action appears only on the Permits tab. Additionally, the security associated with your user ID may limit which actions are available to you.

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

Adding Attachments

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

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

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

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

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

5. Select the file to upload in the browser dialog box and click **Open**.

   The filename appears on the Add Attachments page.
6. On the Add Attachments page, you can enter a description of the file. You can also select a document category and subcategory, based on the document group defined for the transaction type. If a document group was not specified during setup for the transaction type, the category and subcategory are not available.

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

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

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

7. Click the **Upload** button.

Viewing Attachment Details

You view document details on the Attachments details page.

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
4. In the attachments grid, click the **Action** icon for the document that you want to view.
5. Select View Details to open the document details page. In addition to the information on the Attachments page, you can see who last updated the document and when.

Downloading Attachments

You download an attachment on the Attachments page.

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

4. In the attachments grid, click the **Action** icon for the document you want to download.
5. Select Download and save to the location of your choice.

Deleting Attachments

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

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

1. Select **Permits**, **Planning Applications**, or **Worklist** on the Agency Springboard.
2. Access the detail page for the transaction, case, or incident you are working with.
3. Click the **Attachments** link in the left panel to view the Attachments page.
4. Click the **Edit** icon above the grid.
5. Select one or more documents to delete.
6. Click the **Delete** icon.
7. To delete a single document, go to the Attachments page, and select Delete in the **Action** menu for the document you want to delete.

Working with Comments

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

Adding Comments

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

- Favorite comments: Mark comments you use regularly as your favorite and access them easily on the Favorite comments tab
- Standard comments: Select and post a comment from a list of pre-defined comments on the Standard comments tab.
- Recent comments: Select and post comments from a list of recently posted comments on the Recent comments tab.

Viewing and Editing Comments

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

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

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

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

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

Adding a New Comment

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

   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 Fees and Payments

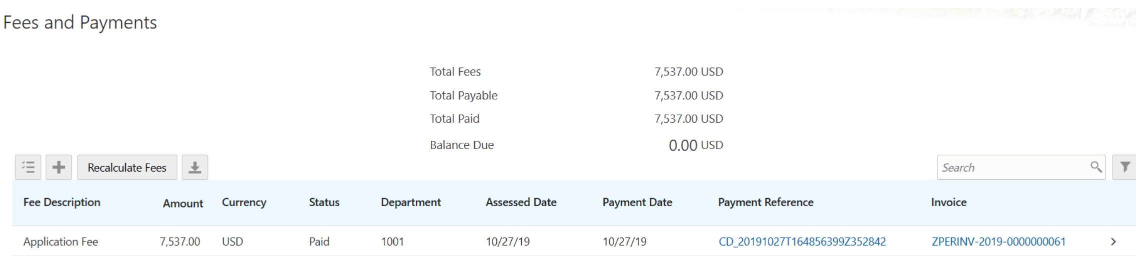
You view and manage fees and payments associated with a submitted permit or planning application on the Fees and Payments page in the application details.

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

Fees are calculated based on agency fee setup.

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

This example illustrates the Fees and Payments page containing the field values described in the surrounding text.



Viewing Fees and Payments for an Application

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

Page Element	Description
Fee Description	The description of the fee as defined when creating a fee item.
Amount	The amount due for each fee.
Currency	The currency in which the transaction is paid.
Status	◦ Canceled: Indicates the fee payment is no longer required. ◦ Pending: Indicates the fee is pending the agency's finalization. The fee may or may not become due. ◦ Hold: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved. ◦ Due: Indicates the current fee request is due and needs to be paid.
Department	The department within the agency requiring the payment.
Assessed Date	The date the request for payment was issued.
Payment Date	The date payment was received.
Payment Reference	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
Invoice	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
Total Fees	The total amount of fees that may be applicable to the application.

Page Element	Description
Total Payable	The amount of fees that are designated as payable. The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.

Adding an Ad Hoc Fee

Using the Fees and Payments page, you can manually add ad hoc fees to an application if the situation arises, such as a late fee, an unforeseen processing fee, an addition to the project request, and so on. These fees are assessed outside of the automatic fees process.

The **Add Fees** button is not available when the application status is Pending Payment or Pending Submittal. When the fee status changes to Due, the system sends a notification to the applicant that new fees have been assessed and are due.

To add a fee:

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

   The department defaults from the fee item, if specified. Otherwise, the system uses the department from the Permit Type or Planning Application Type setup.
6. Set the appropriate date for the fee using the **Assessed Date** field.
7. Use the **Memo** field to add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the application process.
8. Click Save.

Adjusting Fees

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

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

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

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

Paying Fees

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

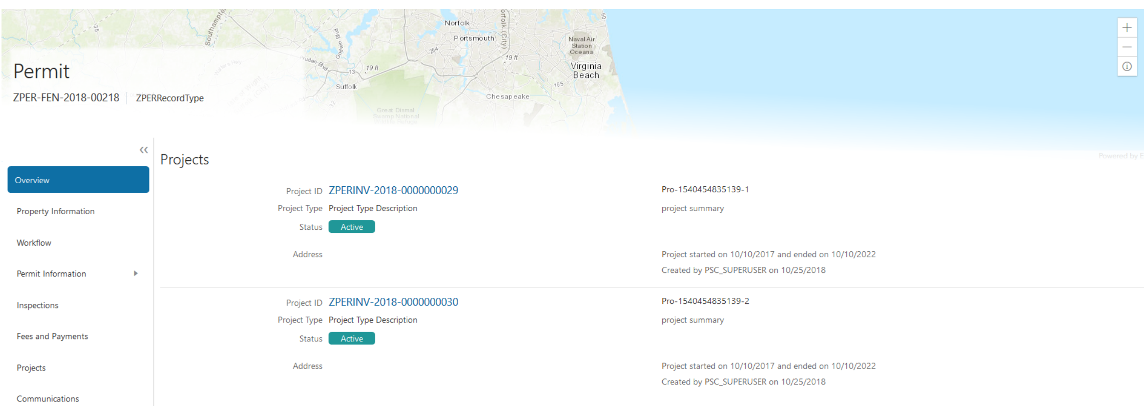
For more information about paying fees, see the *Payment Flow Overview*.

Viewing Project Summaries

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

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

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



Viewing the Project Summary

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

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

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

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

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

Related Topics

- Adding a New Project
- Setting Up Project Types
- Viewing and Updating Project Details

Working with Application Communications

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

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

Sending Application Communications

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

   Select an application on the Transactions page.

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

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

Page Elements	Definition
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists. **Note:** This field appears only for the Emails and Notifications and Notification channel types.
Select and **Insert**	These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click **Insert** to enter a variable for that attribute. For example, if you select the Body field and the Status attribute, and click **Insert**, the `${Status}` variable is inserted into the **Message Body** field of the message. When you send this message, the status of the application associated with the message is included in the body text.
Create Web Form	Click to access the Web Form modal page where you create a questionnaire that you can insert into your message. For each row of the web form, enter the **Question** text along with the **Answer Type** that you expect from the recipient for that question. Possible answer types are: ◦ Date ◦ Text ◦ Number Click **OK** to save your web form questionnaire and return to the Ad Hoc Message page. The Create Web Form button displays the number of questions included on the web form in parentheses.
Insert Web Form	Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.
From	Enter the email address, user ID, or phone number of the person or organization who is sending the generated message. For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service. **Note:**

Page Elements	Definition
	Note: Enter email addresses for the Email and Emails and Notifications channel types, user IDs for the Alert, Emails and Notifications, and Notification channel types, and phone numbers for the Text channel type.
To	Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message. **Note:** Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.
Cc and **Bcc**	Enter the email addresses of the people or organizations that you want to receive a copy of the message. **Note:** These fields appear only for the Emailand Emails and Notifications channel types.
Subject	Enter a brief description of the purpose and content of the message. **Note:** This field does not appear for the Text channel type.
Message Body	Enter the main body text of the message. For the Text channel type and emails and notifications with the Text MIME type, you can enter only plain, unformatted text. For the HTML MIME type, you can enter rich text, links, and images.

4. Click **Send**.

Viewing Application Communications

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

   Select an application on the Transactions page.

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

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

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

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

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

     Select the **Forward** action to access the message in the Message Details modal page. Enter new recipient email addresses, update the message if necessary, and click **Forward** to send the updated message to the new recipients.
   - Click the **View More Details** button to view detailed information about the message.

Working with Ad Hoc Communications

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

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

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

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

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

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

Adding Ad Hoc Alerts

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

Page Element	Description
Reference Name	Enter a unique name for the alert.
Start Date Time and **End Date Time**	Enter the date and time when the alert starts and stops displaying.
Enabled	Turn on the switch to activate the alert.
To	Enter a value for the target recipients of the alert: ◦ Individual Registered Users Enter comma-separated user IDs for the registered users, for example, `SYSTEM_ADMIN,BUSINESS_ANALYST`. ◦ All Registered Users Enter this attribute: `${User}`. The application displays the alert when the registered user logs in. ◦ All Anonymous Users Enter this attribute: `${Anonymous}`. ◦ A Combination of Users Enter a string including comma-separated user IDs for the registered users, `${User}` for all registered users, and `${Anonymous}` for all anonymous users.
Message Body	Enter the main body of the alert using plain, unformatted text.
Select and **Insert**	These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click **Insert** to enter a variable for that attribute. For example, if you select the Body field and the Current Date attribute, and click **Insert**, the `${Current Date}` variable is inserted into the **Message Body** field of the alert. When the application displays this alert, the current date is included in the body text.
Remarks	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

Modifying Ad Hoc Alerts

1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. Select an alert on the Alerts tab of the Communication Center page.
3. On the Alert Details page you can update the alert field values.
4. Click **Save**.

Deleting Ad Hoc Alerts

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

Sending Ad Hoc Emails, Notifications, and Texts

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

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

Page Elements	Definition
	Note: This field appears only for the Emails and Notifications and Notification channel types.
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists. **Note:** This field appears only for the Emails and Notifications and Notification channel types.
Reference	Enter a unique alphanumeric reference for the communication.
Select and **Insert**	These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click **Insert** to enter a variable for that attribute. For example, if you select the Body field and the Current Date attribute, and click **Insert**, the `${Current Date}` variable is inserted into the **Message Body** field of the alert. When the application displays this alert, the current date is included in the body text.
From	Enter the email address, user ID, or phone number of the person or organization who is sending the generated message. For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service. **Note:** Enter email addresses in the **Email Attributes** section for the Email and Emails and Notifications channel types; user IDs in the **Notification Attributes** section for the Alert, Emails and Notifications, and Notification channel types; and phone numbers in the **Compose** section for the Text channel type.
To	Enter a value for the target recipients of the message. For notifications, enter comma-separated user IDs for the registered users, for example, `SYSTEM_ADMIN,BUSINESS_ANALYST`. For emails, enter comma-separated email addresses for the recipients, for example, `john.doe@example.com`.

Page Elements	Definition
Cc and **Bcc**	Enter the email addresses of the people or organizations that you want to receive a copy or a blind copy of the message. **Note:** These fields appear only for the Emailand Emails and Notifications channel types.
Subject	Enter a brief description of the purpose and content of the message. **Note:** This field does not appear for the Text channel type.
Message Body	Enter the main body text of the message. For the Text channel type and emails and notifications with the Text MIME type, you can enter only plain, unformatted text. For the HTML MIME type, you can enter rich text, links, and images.

4. Click **Send**.

Viewing Ad Hoc Emails, Notifications, and Texts

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

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

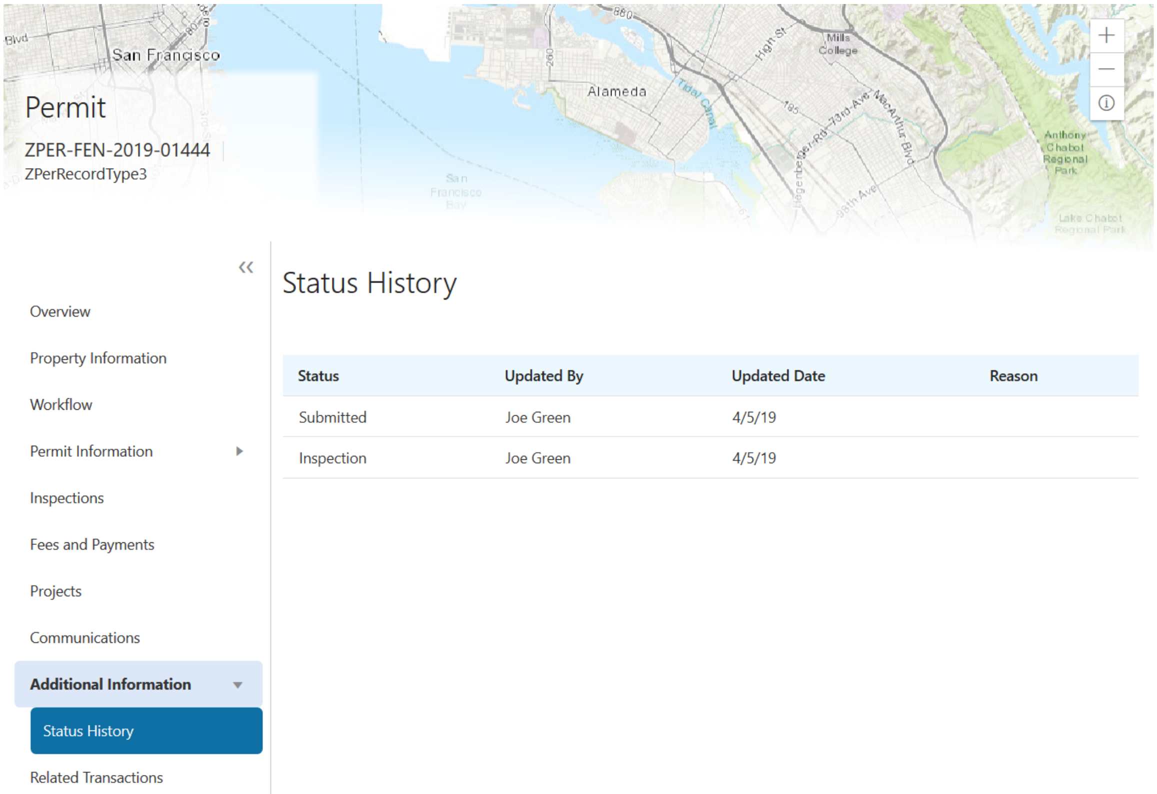
     Select the **Forward** action to access the message in the Message Details modal page. Enter new recipients, update the message if necessary, and click **Forward** to send the updated message to the new recipients.
   - Click the **View More Details** button to view detailed information about the message.

Viewing Application Status History

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

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

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



Reviewing the Status History

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

Page Element	Description
Status	Displays all of the transaction statuses that have been applied to the application. For a list of transaction statuses, see *Setting Up Transaction Statuses*.
Updated By	Displays the name of the person who performed the action that updated the status in the system.
Updated Date	Displays the date when the status changed for the application. The dates are displayed by the first to latest status.

Page Element	Description
Reason	Displays the justification for withdrawing an in-progress application or for canceling a pending application. A reason is required when the agency staff withdraws or cancels an application.

Related Topics

- Setting Up Transaction Statuses

Working with Related Transactions

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

Adding a Related Transaction

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

To link a permit or planning application to a transaction:

1. Select the **Permit** or **Planning Application** tile on the Agency Springboard.
2. On the Transactions page select the permit or planning application for which you want to link a transaction.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page.
4. Click the **Link Transaction** button to open the Link Transaction page, which lists the applications you can link – along with the status and description of the transaction.
5. Select all the desired applications using the check box and click the **Add Selected** button to establish a link between the transaction applications.

   The Related Transactions page for each of the newly linked transaction now lists the new transaction row with a link to access the linked related transaction application.

Removing a Related Transaction Link

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

To remove an application link:

1. Select the **Permit** or **Planning Application** tile on the Agency Springboard.
2. On the Transactions page select the permit or planning application from which you want to remove the application link.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page.
4. Click the **Delete** icon on the related transaction row you want to delete. The Related Transactions page refreshes to list the remaining related transaction rows.

Application Expiration Overview

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

Application Rules Overview

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

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

Permit Expiration Dates Overview

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

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

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

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

- When the permit expires.

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

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

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

Planning Application Expiration Dates Overview

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

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

- When the entitlement expires.

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

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

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

Pre-Application Expiration Date Overview

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.

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

- When the pre-application expires.

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

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

Processing Expiration Status Overview

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

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

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

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

Working with Application Expiration

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

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

Viewing the Expiration Dates

To view the expiration dates:

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

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

Extending Expiration Dates

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

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

Related Topics

- Application Expiration Overview

Updating Application Expiration Status

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

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

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

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

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

Entering Parameters to Process Expiration Rules

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

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ◦ Once: Select to run the process one time only. ◦ Hourly or minute: Select to run the process at regular time intervals. ◦ Daily: Select to run the process at regular intervals in days. **Note:** Daily is the recommended option for running the expiration status update process. ◦ Weekly: Select to run the process at regular intervals in weeks. ◦ Monthly: Select to run the process on specific days of the month. ◦ Yearly: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing. You can leave this field blank to make the process schedule open-ended.
Hours and **Minutes**	Enter the time interval between scheduled processes. For example, if you enter 2 in the **Hours** field and 30 in the **Minutes** field, the process will run every 2 hours and 30 minutes beginning on the specified start date.

Page Element	Description
	Note: These fields are available only if you select a process frequency of Hours or Minutes.
Days	Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date. **Note:** This field is available only if you select a process frequency of Daily.
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date. **Note:** This field is available only if you select a process frequency of Weekly.
Repeat – By day	Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the **Second**and **Wednesday** options, the process will run on the second Wednesday of every month. You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Repeat – By date	Select this option to run the process on specific dates of the month. You can select more than one date. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Month	Select the months in which you want your process to run.

Page Element	Description
	Note: This option and its associated fields are available only if you select a process frequency of Yearly.

Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

   By default, the recipient will receive a notification when the process ends with the following conditions:

   - On success
   - On error
   - On warning

   You can remove any of these process notification conditions.
5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

3 Managing Projects

Using Projects

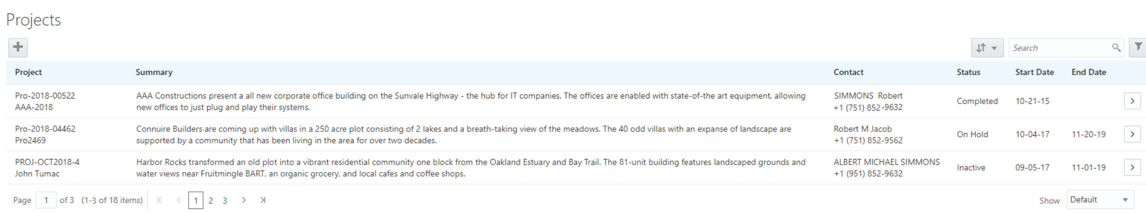
This topic discusses how to use the Public Sector Compliance and Regulation Projects.

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

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

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

This example illustrates the Projects page:



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

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

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

Using the Projects Page

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

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

Page Elements	Description
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort by	Select an option to sort the projects in the list by these fields: ◦ Project ◦ Project Summary ◦ Contact ◦ Status ◦ Start Date ◦ End Date
	Click the **Details** button to access the details for the selected project.

Adding a New Project

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

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

Page Elements	Description
Project ID	Displays the system generated project ID after you save the project.
Name	Enter the name of the project.
Summary	Enter a detailed description of the project.
Type	Select the type of project from the list of options.
Status	Select the status of the project: ◦ Active

Page Elements	Description
	◦ Canceled ◦ On Hold ◦ Inactive ◦ Completed
Estimated Valuation	Enter an estimated amount for the project.
Start Date	Enter the start date for the project.
End Date	Enter the end date of the project.
Primary Contact	Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the **Search**option. Select the desired contact and use the **Select Contact Type** option to select the type of contact.

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

Assigning Transactions to a Project

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

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

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

Unassigning Transactions from a Project

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

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

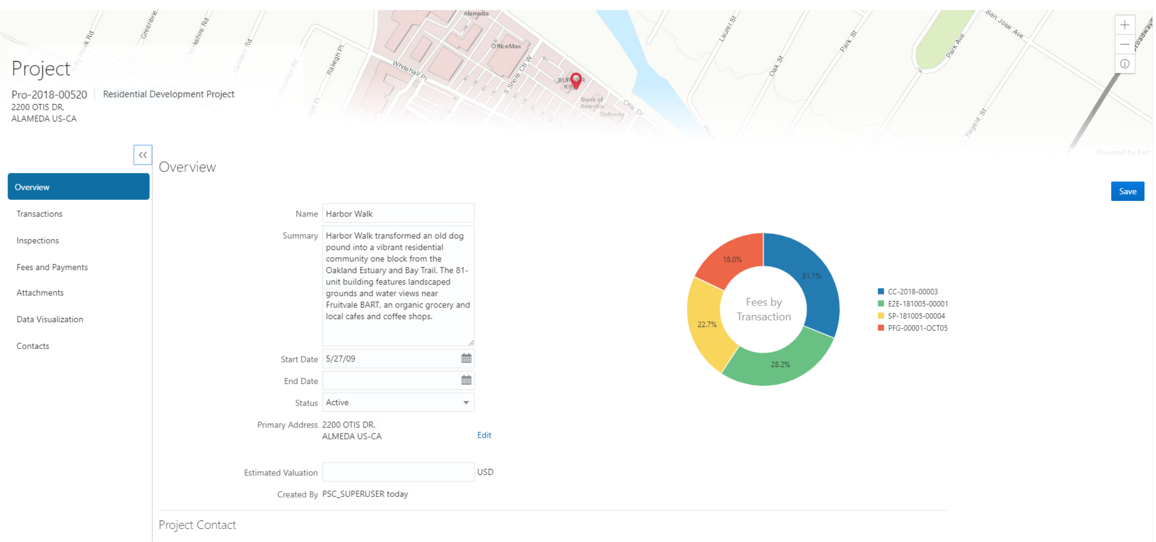
Viewing and Updating Project Details

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

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

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

This example illustrates the Project Details page:



Using the Overview Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. The Overview page displays the information about the selected project in three sections – Overview, Primary Contact, and Fees and Payments.

4. The Overview section lists the basic information about the project. You can edit values for all the fields except for the **Project ID** and the **Created By** fields, which are system generated. The field descriptions are detailed under *Adding a New Project*.
    - A graphical chart displays the top five transactions and their percentage fees distribution, calculated using the transaction total fees from all the assignments for the project. Others accounts to the fees from the rest of the transactions assigned to the project.
    - The Primary Contact section displays the details of the contact that was entered at the time of creating the project. You cannot edit the values for these fields on this page.

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

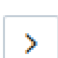
    - The Fees and Payments section displays:

Page Elements	Description
Total Fees	The sum of all the fee values from all the transactions assigned to the project.
Total Payable	The sum of the payable amounts from all the transactions assigned to the project.
Total Paid	The sum of the amounts paid for all the transactions assigned to the project.
Balance Due	The sum of the amounts that is due for all the transactions assigned to the project. **Note:** Balance amount is the difference between the total payable amount and the total paid amount.

      The fields in this section are displayed if there is at least one assignment (permit, planning application, or pre-application) for the project. You cannot edit the values for these fields on this page.
5. Click **Save** to save your changes, if any.

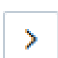
Using the Transactions Page

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

Page Elements	Description
Edit	Click to enable the selection of transactions for unassigning them from the project. See **Unassigning Transactions from a Project** under *Adding a New Project*.
Assign	Click to open the Assign page and select transactions to assign to the project. See **Assigning Transactions** under *Adding a New Project*.
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort	Sort the list of transactions by: ◦ Date ◦ Transaction ID ◦ Status
Alert icon	Identify transactions with a status affected by a condition or if they are pending submit.
Transaction	Displays the name and description of the transaction.
Status	Displays the status of the transaction.
Created By	Displays the name of the user who created the transaction, with the date and time of creation.
Applicant	Displays the name, email ID, and contact number of the applicant associated to the transaction.
Property	Displays the address of the property for which the transaction is applied.
Fees	Displays the total fees paid and the balance due, if any.
	Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See *Navigating to Planning Application Details*.

Using the Inspections Page

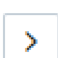
1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click Inspections on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

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

Using the Fees and Payments Page

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

Page Elements	Description
Total Fees	Displays the total amount of fees that may be applicable to the transaction.
Total Payable	Displays the amount of fees that is designated as payable. Fees that are not payable include fees on hole, for example.
Total paid	Displays the amount of the total fees already collected.

Page Elements	Description
Balance Due	Displays the remaining portion of the fees yet to be collected.
Transaction	Displays the transaction ID.
Fee Description	Displays the description of the fee item as defined when creating a fee item.
Amount	Displays the amount due for each fee item.
Currency	Displays the currency in which the transaction will be paid.
Status	Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due.
Assessed Date	Displays the date the request for payment was issued.
Payment Date	Displays the date payment was received.
Payment Reference	Displays the payment reference issued for the transaction.
Invoice	Displays the invoice number of the agency associated with the permit transaction application.
	Click to access the Fee Item Details page and review the details of the fees.

Using the Attachments Page

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

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

Page Elements	Description
File Name	View the following information in the Filename field:

Page Elements	Description
	◦ Filename with file type extension ◦ File Size ◦ Uploaded By user name ◦ Uploaded On date
Description	View the description of the attachment as entered by the user who added the attachment.
Category/ Subcategory	View the document category and subcategory for the attachment. This field appears only if a document group is set up on the Project Type Details page while setting up the project type. See *Setting Up Project Types*.
Actions	Click the actions icon to select and perform an action: ◦ View Details ◦ Download ◦ Delete

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

Adding Project Attachments

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

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

Downloading Project Attachments

You download a document on the Attachments page.

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

Deleting Project Attachments

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

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

Using the Data Visualization Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Data Visualization** on the left panel to access graphical charts that display the comparative data related to transactions within the selected project. These graphical charts are organized in three separate tabs, with a grid each displaying a list of all the transactions within the project:
    - **Fees by Transaction Type**: The chart displays all the project transactions represented as bars – each bar grouping transactions by the transaction type, along with the total amount of fees applicable. Click a bar to list all the transactions for that transaction type with their details at the bottom of the page.
    - **Fee Details**: The chart displays all the project transactions represented as bars. Each transaction is displayed as a combination of two bars – one bar reads the total amount of all applicable fees and the other reads the total amount of all fees paid. Click a bar to list all the transactional fee item details at the bottom of the page.
    - **Inspection Status**: The pie chart displays the inspection status of each of the permits assigned to the project. Click a section of the chart to view the details of the inspections pertaining to the permits at the bottom of the page.

Using the Contacts Page

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

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

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:

    - Add a contact from registered contacts: You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.

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

      The primary contact that was selected at the time of creating the project will longer be a primary contact.
    - Add a brand new contact manually: You create a new contact by entering all the contact details and then include in the transaction.

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

Related Topics

- Applying Conditions to Applications

4 Managing Property Information

Working with Parcel Attachments

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

Viewing Parcel Attachments

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

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

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

Page Element	Description
Filename and **Description**	View the filename and description entered by the user upon upload.
File Size	View the size of the attachment.
Category and **Subcategory**	View the document category and subcategory for the attachment.
Actions	Click to select an action: ◦ View Details: Select to view detailed information about the attachment. ◦ Download: Select to download the attachment. ◦ Delete: Select to delete the attachment. You will be prompted to confirm the permanent deletion.

Adding Parcel Attachments

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

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

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

The filename appears on the Add Attachments page.

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

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

For more information on document categories and subcategories, see *Setting Up Document Categories and Subcategories*.

7. Click the **Upload** button.

Deleting Parcel Attachments

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

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

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

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

Applying Conditions to Parcels

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

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

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

Applying a Condition to a Parcel

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

   Select a parcel on the Parcel page.

Click Conditions in the navigation bar.

2. Click **Apply Condition**.
3. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	Select the condition that you want to apply. For more information on conditions, see *Setting Up Conditions*.
Severity	Displays the level of severity defined for the selected condition. ◦ Lock: This severity suspends all operations and selects all business rules for the condition. ◦ Hold: This severity enables agency staff to select the business rules that apply to the condition. ◦ Notice: This severity functions as an alert and has no effect on operations.
Business Rules	Select the **Prevent New** business rule. **Note:** The business rule is available for selection based on the severity of the condition you select. For example, for a condition with a Hold severity you must select the business rule, and for a condition with a Lock severity, the business rule is automatically applied.
Additional Information	Enter additional information for the condition.
Display Message	Displays the message associated with the selected condition.
Priority	Select a priority for the condition. Values are High, Medium, and Low.
Description	Displays the description associated with the selected condition. You can edit this text.
Apply Condition to Transactions	Turn on the switch to apply the condition to all the new transactions that will be associated with the selected parcel. The following business rules are also applied, If selected at the time of applying the condition: ◦ Prevent Workflow Advancing ◦ Prevent Issue or Final ◦ Restrict Payment ◦ Prevent Inspection Schedule

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

4. Click **Save**.

Resolving a Condition

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

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

   Select a parcel on the Parcel page.

   Click Conditions in the navigation bar.
2. Click Resolve for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Select the **Resolve conditions applied to transactions** switch to resolve the condition that is impacting any other transactions associated with the parcel.

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

Modifying a Condition

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

   Select a parcel on the Parcel page.

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

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

4. Click **Save**.

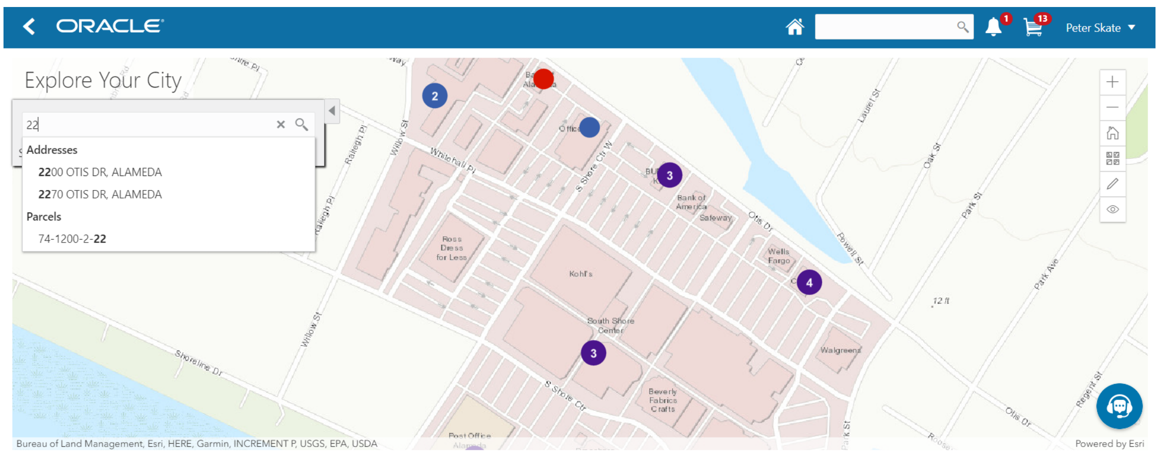
5 Working with Maps

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.

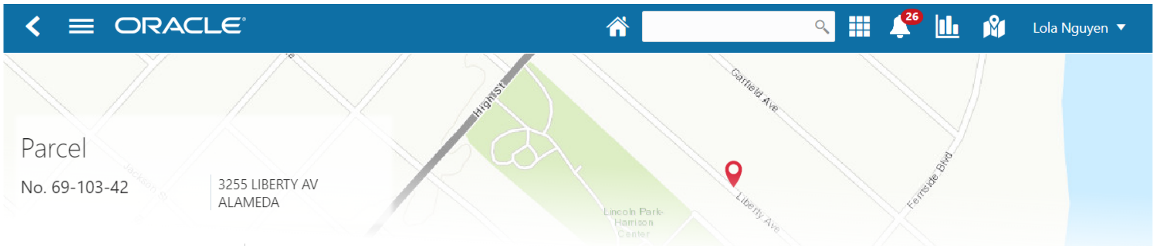
Viewing Map Markers

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.

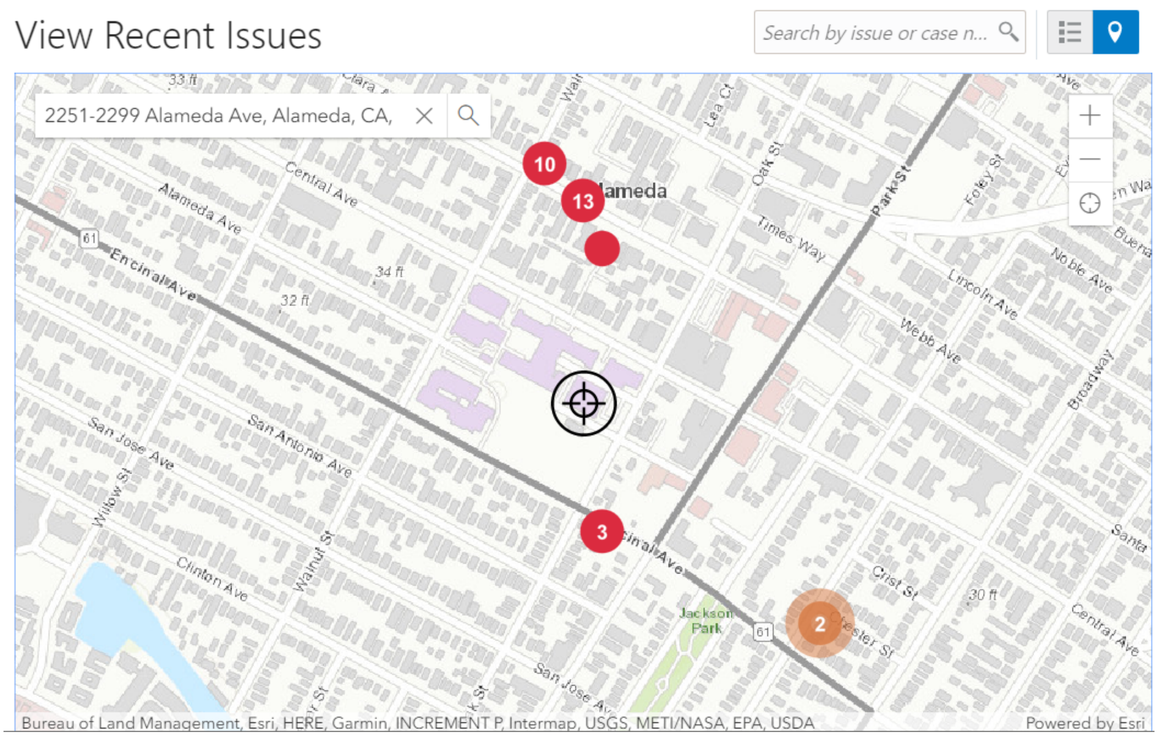


Maps with Multiple Locations Marked

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.

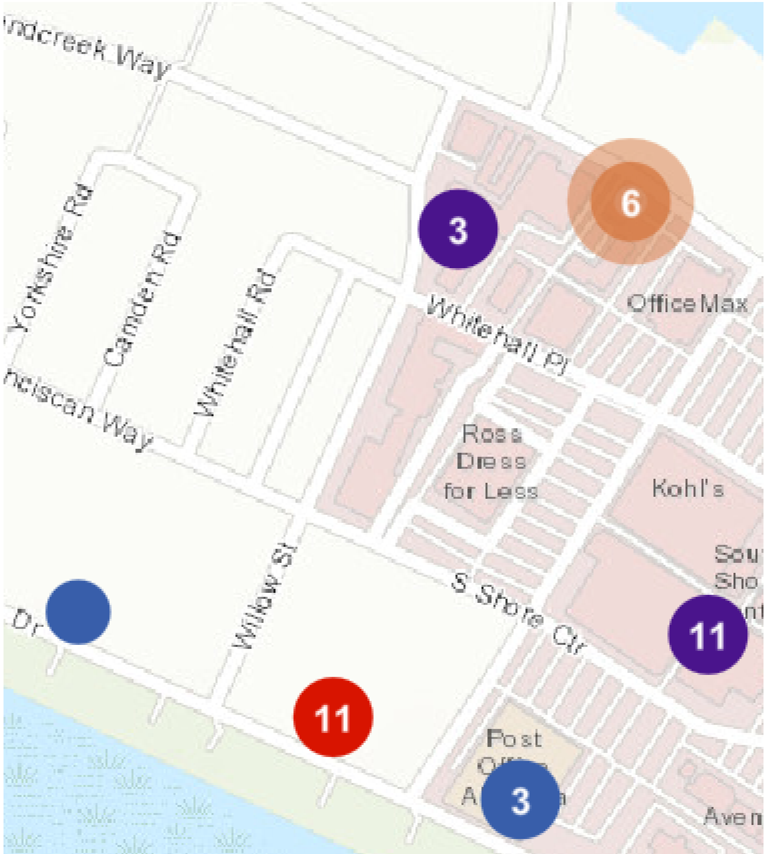
This example illustrates the map for viewing recent code enforcement issues. The red circles, with and without numbers, are individual locations with issues. The orange circle represents a cluster with multiple locations.



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.



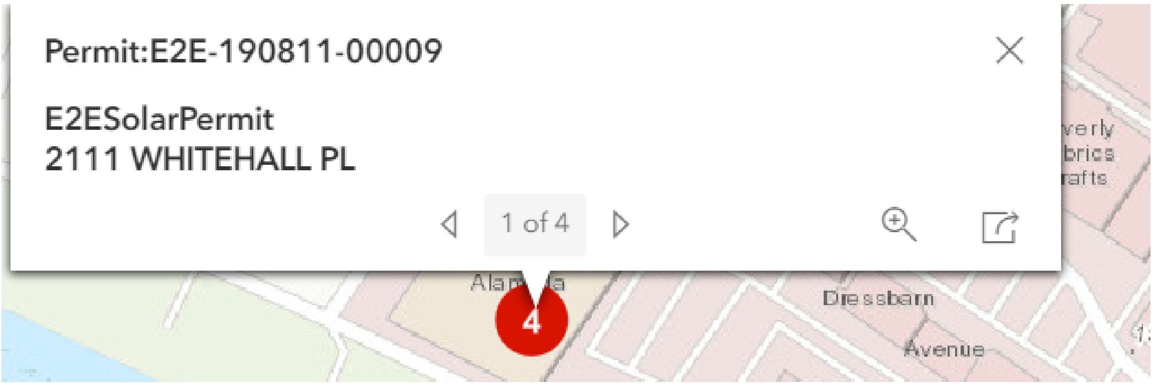
The following table provides a key to the marker colors:

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.

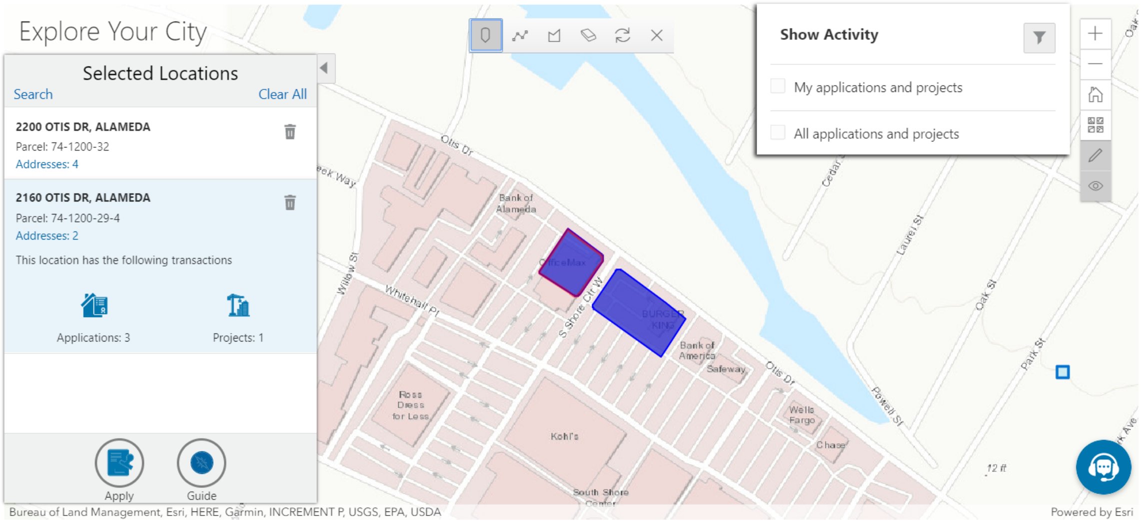
To select parcels or addresses, use the search feature, or the drawing tools on the selection toolbar, or a combination of both.

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.

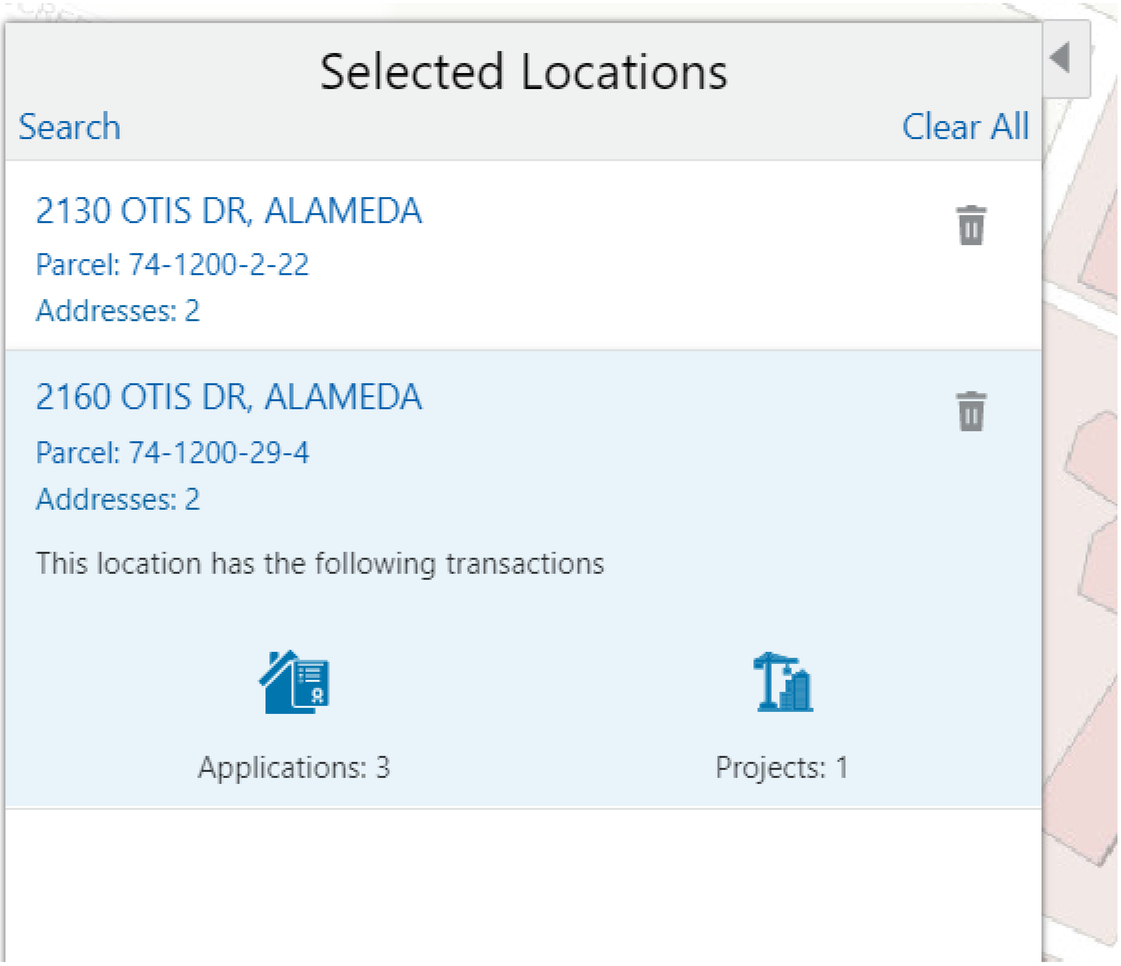
3. Review details of your selections on the Selected Locations list.

   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.

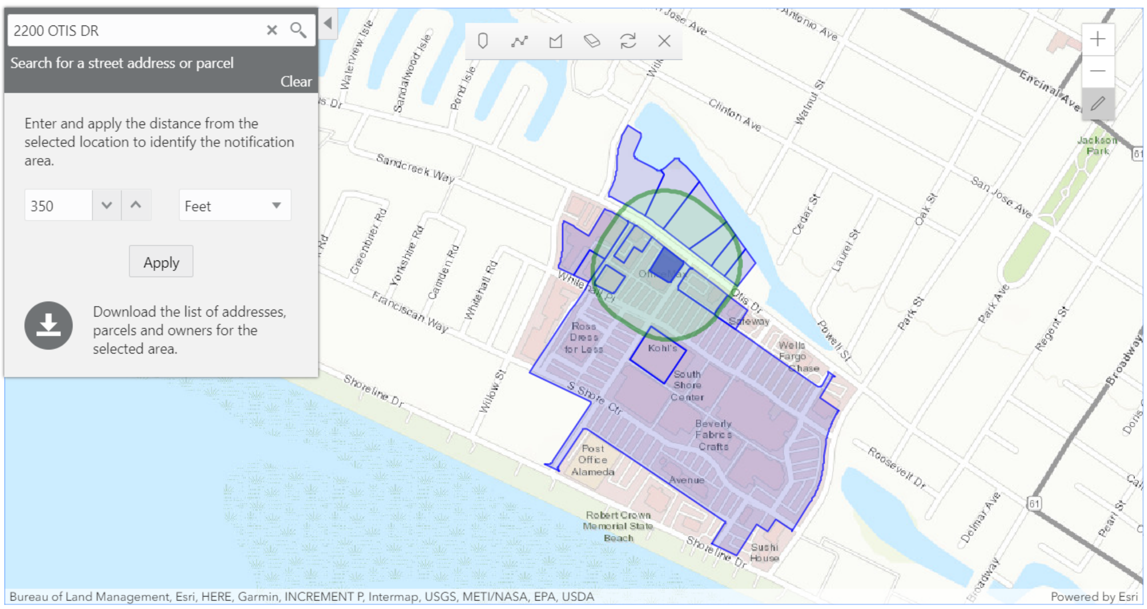
Creating Map-Based Public Notification Lists

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.

6 Working with Payments

Payment Flow Overview

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

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

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

Understanding Fees

Some basics about fees include the following:

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

Fee Payments Process for Applicants

Applicants can make a payment by following this process:

1. On the My Permits page, add fees items to the payment cart.
2. Select fees for payment in the payment cart.

   Fees not selected for payment remain in the cart.
3. Click the **Continue to Checkout** button.
4. Review the Checkout page, which lists the different secured payment methods available.

   Only agency staff can process cash and check payments.
5. Select one of the payment methods for payment processing.

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

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

Fee Payments Process for Agency Staff

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

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

   Agency staff skip the payment cart and go directly to the Checkout page.
2. Review the Checkout page, which lists the different payment methods available, such as cash or check.
3. Select one of the payment methods for payment processing.

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

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

Payment Cart Overview

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

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

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

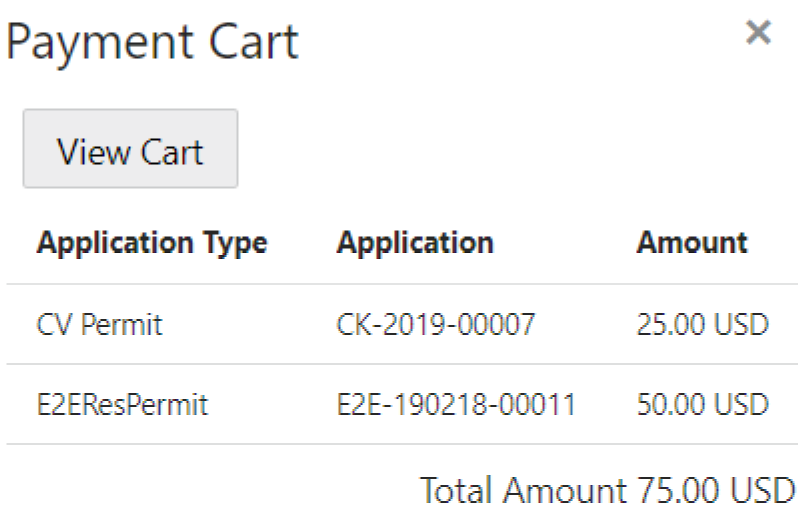
Viewing Fees in the Payment Cart Summary

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

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

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

This example illustrates the Payment Cart summary page.



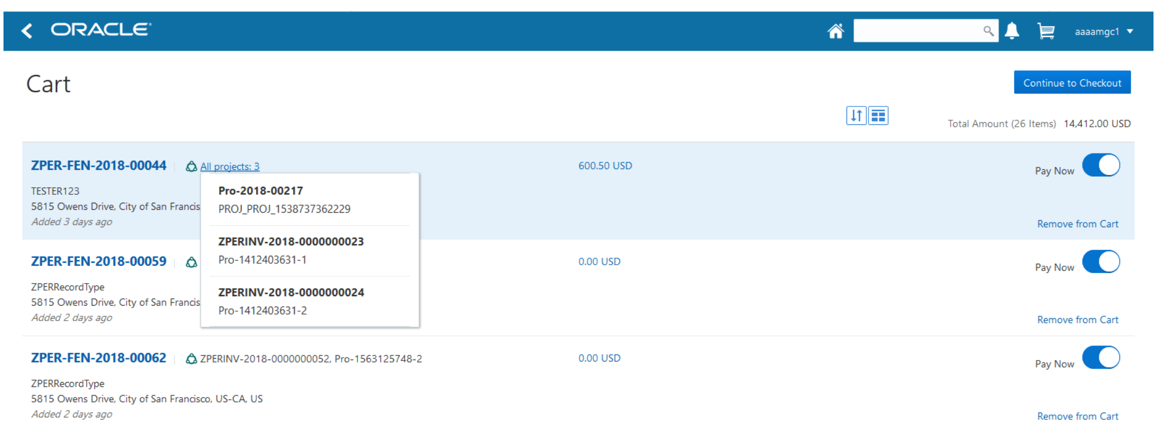
If the cart is empty, the summary of fees is not available.

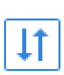
Clicking the **View Cart** button opens the Cart page.

Paying Fees in the Payment Cart

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

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



Page Elements	Usage
	Click to group the fees by Address or Application Type.
	Click to sort the fees by Added Date, Application Type, or Application.

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

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

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

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

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

Users cannot make any changes to the application and associated fees submitted for payment during processing. After the payment processing is complete, the items are removed from the cart, and the system directs the user back to the

Cart page to pay remaining fees. If the cart is empty after a successful payment, the user is directed their Applications page. If the payment fails, the fees remain in the cart and can be updated or resubmitted for payment.

Working with Cashier Sessions

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

Opening a Cashier Session

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

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

4. Click **Save**.

Modifying a Cashier Session

1. Select **Billing and Payment** > **Cashier Sessions** .
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:
   - Suspend an open cashier session by setting the **Status** to Suspended.
   - Reopen a suspended or closed cashier session by setting the **Status** back to Open.
   - Close a cashier session by setting the **Status** to Closed. When you close a cashier session enter an amount for the **Closing Balance**.

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

4. Click **Save**.

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

Printing Deposit Slips

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

You print deposit slips using the Print Deposit Slip page.

Prerequisites

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

Generating Deposit Slips

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

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

Page Element	Description

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

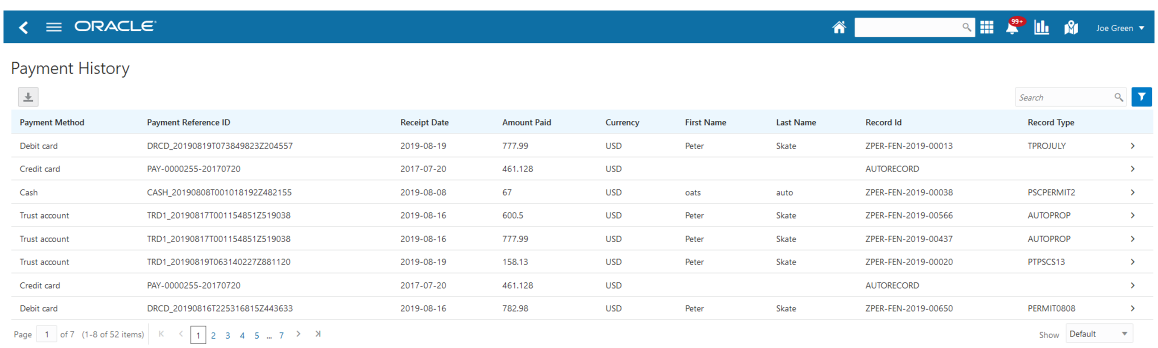
3. Click **Print**. The generated deposit slip file opens in a separate browser tab.

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

Viewing Payment History

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

This example shows the Payment History page.



Reviewing Payment History

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

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

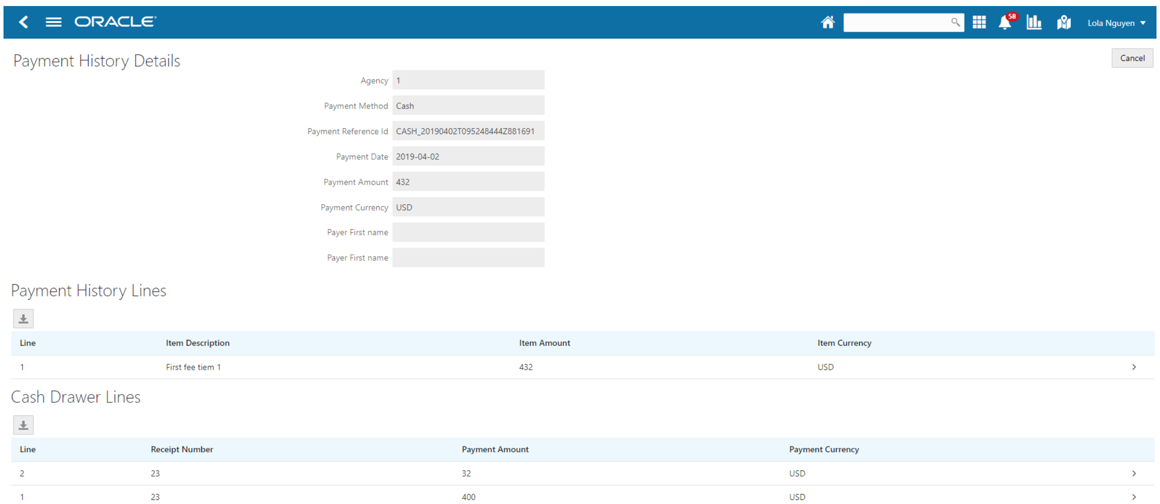
The Payment History page displays all of the payments received by the agency. You can search for and sort payments by:

- Payment method
- Payment reference ID
- Payment date

- Payment amount
- Payment currency
- Payer first name
- Payer last name
- Record ID
- Record type

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

   This example shows the Payment History Details page.



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

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

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

7 Working with Accounting

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

Viewing Accounting Transactions

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

   Each accounting transaction has one of the following statuses:

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

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

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

Generating Journal Entries

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

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

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

Entering Generate Accounting Process Parameters

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

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

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ◦ Once: Select to run the process one time only. ◦ Hourly or minute: Select to run the process at regular time intervals. ◦ Daily: Select to run the process at regular intervals in days. ◦ Weekly: Select to run the process at regular intervals in weeks. ◦ Monthly: Select to run the process on specific days of the month. ◦ Yearly: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing. You can leave this field blank to make the process schedule open-ended.
Hours and **Minutes**	Enter the time interval between scheduled processes. For example, if you enter 2 in the **Hours** field and 30 in the **Minutes** field, the process will run every 2 hours and 30 minutes beginning on the specified start date. **Note:** These fields are available only if you select a process frequency of Hourly or minute.
Days	Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date. **Note:** This field is available only if you select a process frequency of Daily.
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.

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

Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

Viewing Journal Entries

Select **Accounting** > **Journal** , or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- Created: Indicates that the journal has been created but not validated.
- Error: Indicates that the journal has one or more validation errors.
- Valid: Indicates that the journal has been validated and is ready to be exported.
- Sent: Indicates that the journal has been exported to a file that can be used to update an ERP system.

Reviewing Accounting Lines

1. Select **Accounting** > **Journal** , or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
   - **Account**
   - **Division**
   - **Department**

    - **Fund**
    - **Function**
    - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

Viewing Journal Entry Errors

1. Select **Accounting** > **Journal** , or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.
   You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

You can create a file containing accounting transactions that can be imported into an Enterprise Resource Planning (ERP) system.

> **Note:** If you use Oracle Financials Cloud as your ERP system, we recommend using the Financials Cloud Subledger Accounting feature to enable ERP accounting integration instead of using the Export Journals to ERP process.

You run the process that exports journal entries on the Export Journals to ERP page, which you can access by selecting **Accounting** > **Export Journals** .

Entering Export Journals to ERP Process Parameters

Access the Parameters tab on the Export Journals to ERP page and enter values using the following fields:

Page Element	Description
Mapping Name	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see *Setting Up Data Format Exchange Maps*.
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.
Accounting Date From and **Accounting Date To**	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Page Element	Description

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ◦ Once: Select to run the process one time only. ◦ Hourly or minute: Select to run the process at regular time intervals. ◦ Daily: Select to run the process at regular intervals in days. ◦ Weekly: Select to run the process at regular intervals in weeks. ◦ Monthly: Select to run the process on specific days of the month. ◦ Yearly: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing. You can leave this field blank to make the process schedule open-ended.
Hours and **Minutes**	Enter the time interval between scheduled processes. For example, if you enter 2 in the **Hours** field and 30 in the **Minutes** field, the process will run every 2 hours and 30 minutes beginning on the specified start date. **Note:** These fields are available only if you select a process frequency of Hourly or minute.
Days	Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date. **Note:** This field is available only if you select a process frequency of Daily.

Page Element	Description
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date. **Note:** This field is available only if you select a process frequency of Weekly.
By day	Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the **Second**and **Wednesday** options, the process will run on the second Wednesday of every month. You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
By date	Select this option to run the process on specific dates of the month. You can select more than one date. **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Month	Select the months in which you want your process to run. **Note:** This option and its associated fields are available only if you select a process frequency of Yearly.

Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.

3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

   By default, the recipient will receive a notification when the process ends with the following conditions:

   - On success
   - On error
   - On warning

   You can remove any of these process notification conditions.
5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Processing the Journal Entry Output

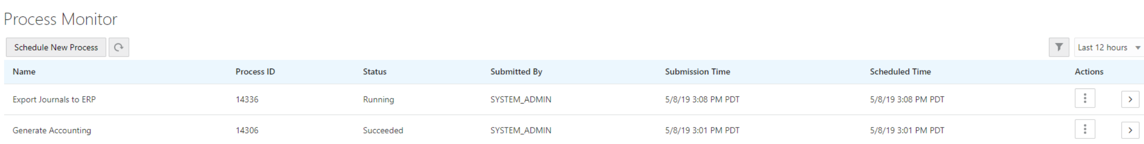
Use the publicSectorMappingAttachments REST API to process the output file generated by the Export Journals to ERP. For more information on this REST API, see *REST API for Oracle Public Sector Cloud*.

8 Working with Processes

Using the Process Monitor

The Process Monitor enables users to initiate and manage processes for Oracle Public Sector Compliance and Regulation.

This example shows the Process Monitor page.



Scheduling a New Process

1. Select **Common** > **Process Monitor** .
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the Generate Accounting process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.

   Note: Processes can be run immediately or scheduled to run at a specific time.

6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

Managing Processes

Select **Common** > **Process Monitor** .

The Process Monitor page displays the following information for each process:

- **Name**
- **Process ID**
- **Status**
- **Submitted By**
- **Submission Time**
- **Scheduled Time**

Note: The **Submission Time** and **Scheduled Time** columns use the time zone specified in the user's preferences, not the time zone for the agency.

Click **Filter By** to filter the displayed process information by Name, Process, and Submission Time.

You can manage processes using the following page elements:

Page Element	Description
Actions	Click the icon in this column to select one of the following actions: • Put on Hold • Release Process • Cancel Process
View More Details	Click to view additional information about the process on the Process Details page.

9 Using the Digital Assistant

Overview of Digital Assistant

Create your own digital assistant from scratch using your Oracle Digital Assistant instance and configure its parameters to suit your requirement before making it available for your users.

Create and add skills to your digital assistant. You can also use the Oracle delivered sample skills and re-configure its parameters, or clone the skill for the digital assistant you create.

Enable your digital assistant to provide generic information about processes or answer specific questions about your offerings, and enlist your own set of frequently asked question with answers.

Asking Details

The delivered digital assistant skills, for example, facilitates responses and recommendations to questions raised by an anonymous user regarding the permitting process:

- With the PERMIT SEARCH skill, the digital assistant can access information from the Permit implementation and list the permits that match one of the search parameters – Permit Number, Parcel ID, and Street. Users can also review the permit detail page, if they want to look into a permit they just searched.
- With the PERMIT RECOMMENDATIONS skill, the digital assistant can access information from Oracle Policy Automation (OPA) and list permit recommendations. The skill prompts the user with questions from the OPA questionnaire and retrieves a list of recommended permits based on the user's responses to the questions.

For details on configuring your digital assistant for use, such as intents and the dialog flow, see the documentation *Configure for Use in a Digital Assistant*.

Asking Questions

Your digital assistant can store a list of questions and answers to be available as Frequently Asked Questions (FAQs) regarding the processes your agency follows.

The content for the FAQs are entered in a spreadsheet and attached to the digital assistant. The Oracle delivered spreadsheet can be updated with information from your knowledge-base.

For details on configuring your digital assistant to add questions and answers, see the documentation on *Q&A*.

10 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.

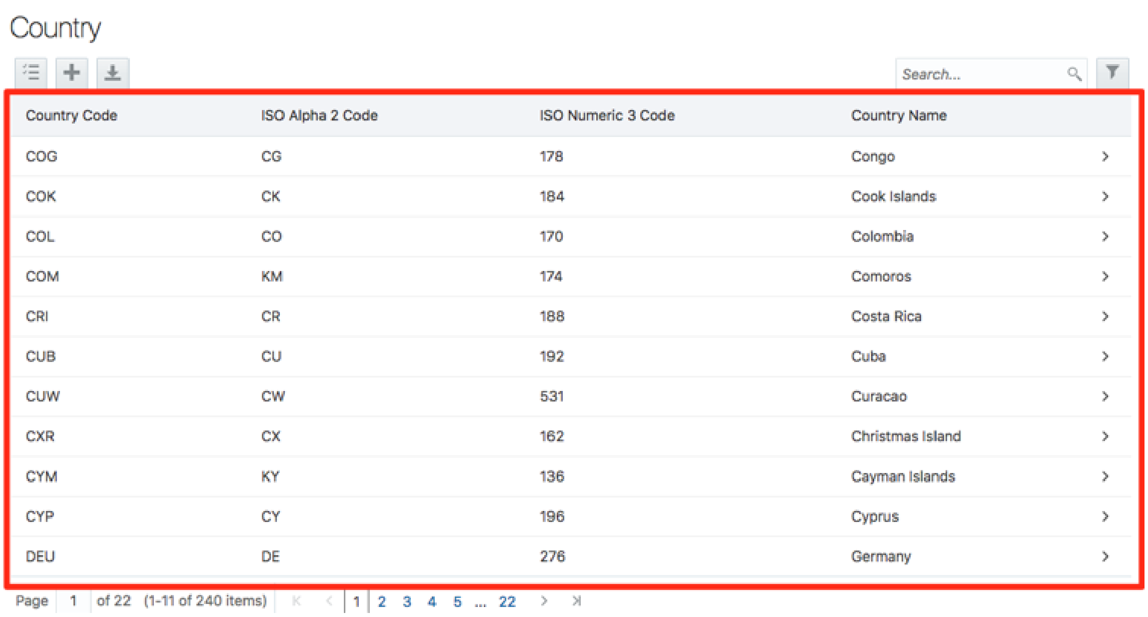
Keyboard Shortcut	Description
<SPACEBAR>	Use for: • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
<ENTER>	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
<DOWN ARROW>	Use for: • Moving through values in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



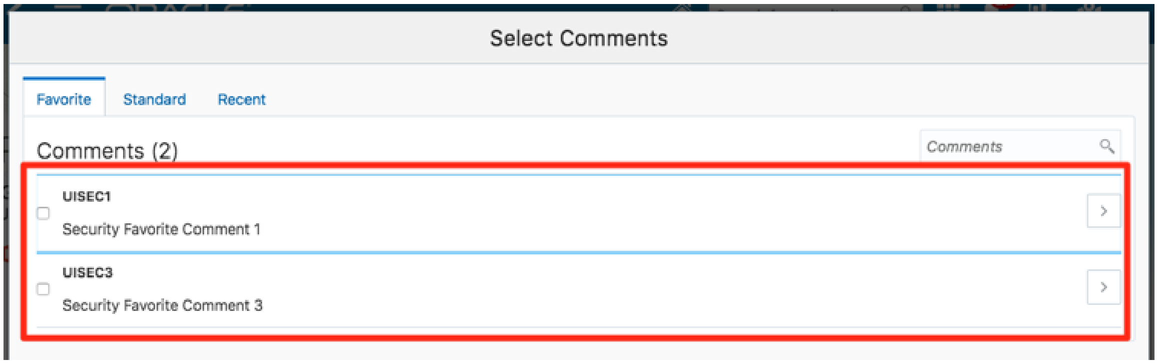
Country Code	ISO Alpha 2 Code	ISO Numeric 3 Code	Country Name
COG	CG	178	Congo
COK	CK	184	Cook Islands
COL	CO	170	Colombia
COM	KM	174	Comoros
CRI	CR	188	Costa Rica
CUB	CU	192	Cuba
CUW	CW	531	Curacao
CXR	CX	162	Christmas Island
CYM	KY	136	Cayman Islands
CYP	CY	196	Cyprus
DEU	DE	276	Germany

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.



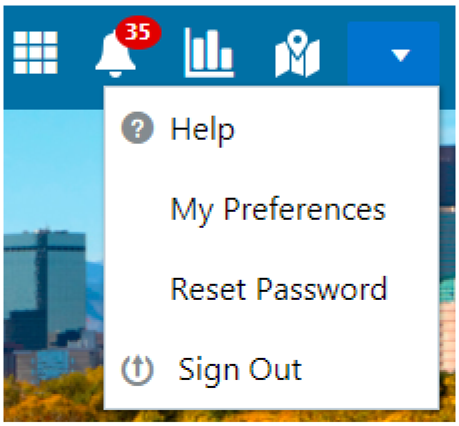
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the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

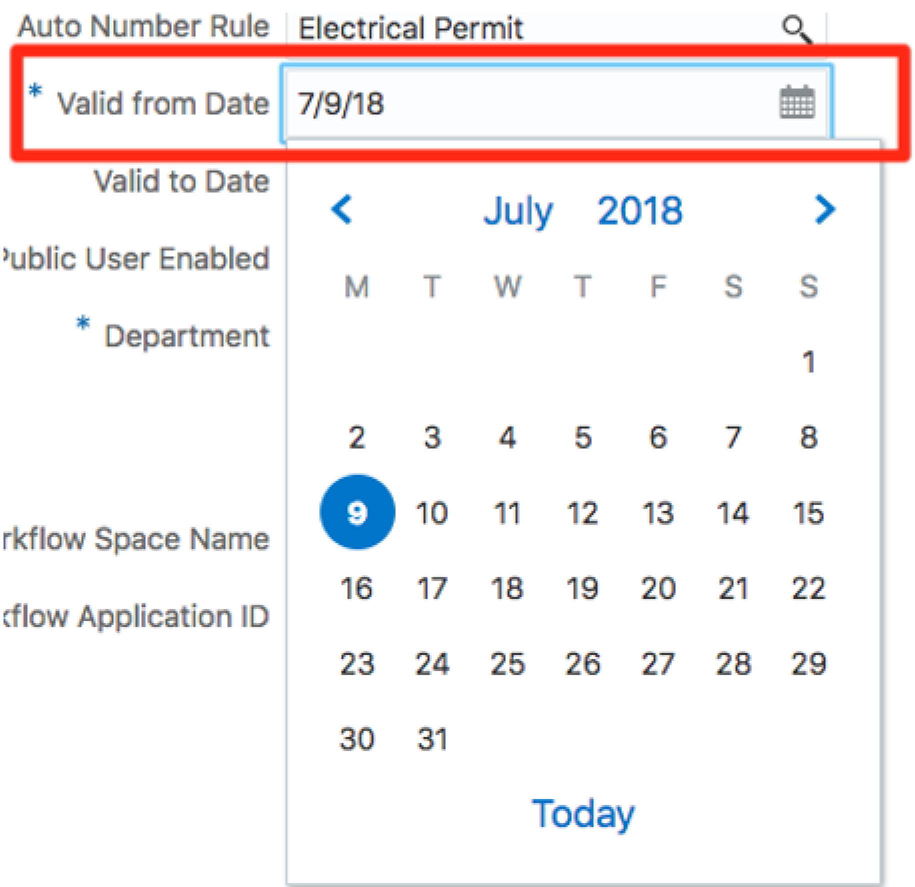
This section describes how to use the keyboard to control buttons in the global header or on pages.



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.

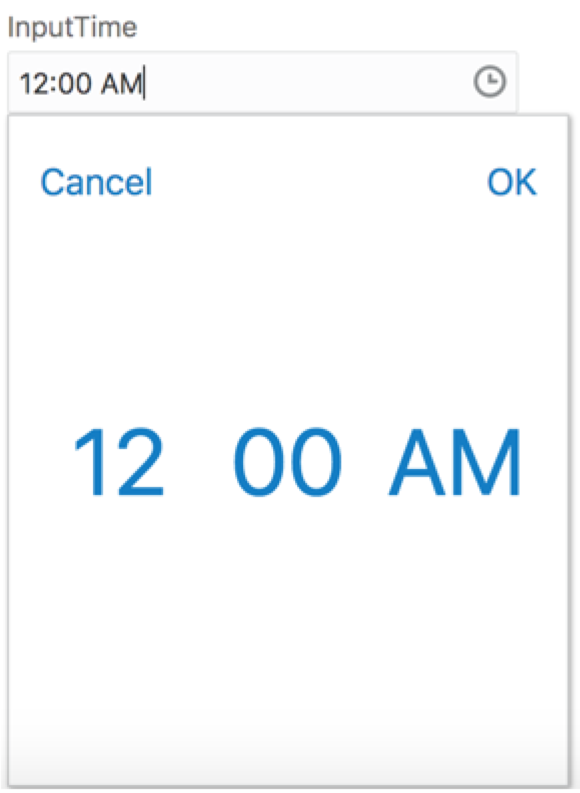


Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calender grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day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

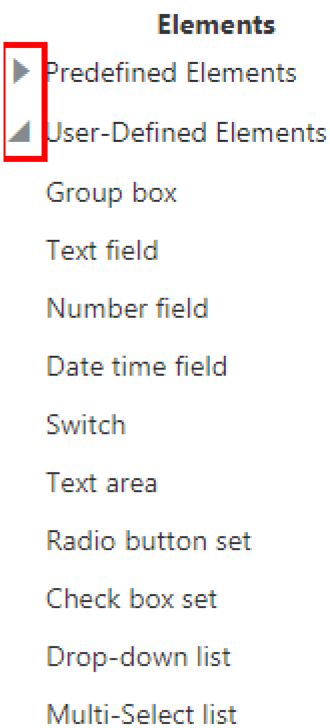
This section describes the hot keys you can use when working with the time picker control to select time field values.



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.



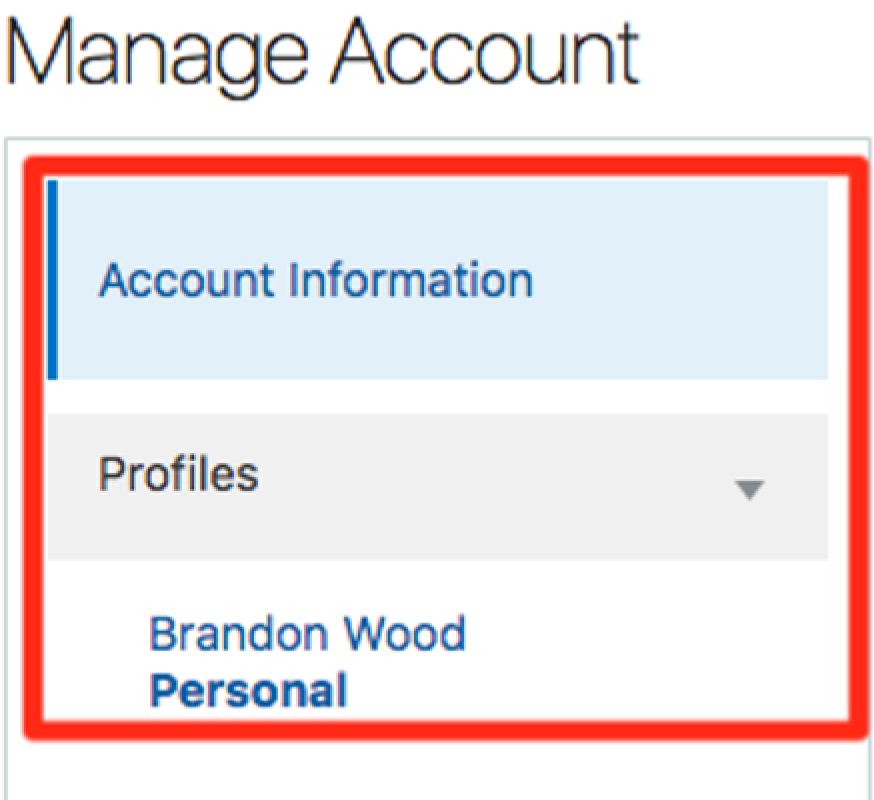
The following table lists the keyboard options for working with the collapsible headers.

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.



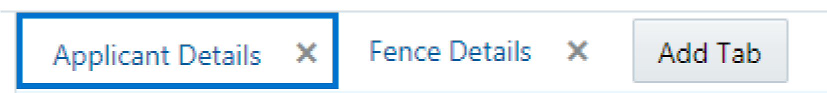
The following table lists the keyboard options used for accessing list items.

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.