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Using Oracle Public Sector Permits

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Contents

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Preface

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

Using Oracle Applications

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

Conventions

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

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

Additional Resources

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

Documentation Accessibility

This topic covers accessibility concepts for this guide.

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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

Contacting Oracle

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

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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*.

Using Oracle Public Sector Permits

Part Number: E93170-01

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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.

Permits are associated with specific profiles rather than with the overall account. When the user applies for a permit, the permit is associated with the currently selected profile. Similarly, when users view their existing permits, the system displays the subset of permits that are associated with the current profile.

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

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

Profile Selection

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

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

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

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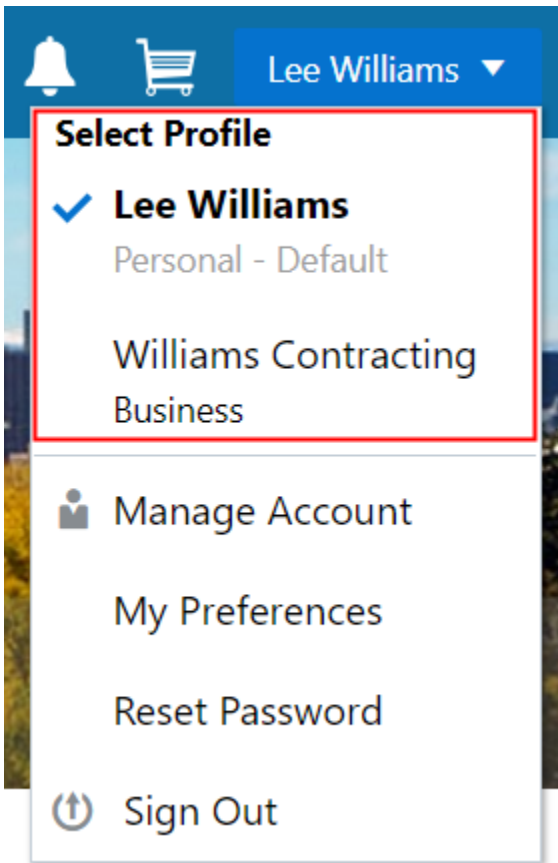
Account Data Versus Profile Data

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 is a member of law enforcement or a judicial agency, and whether that information has been verified.
  Your agency configures whether to track this information and whether it needs verification.
  This information is visible to agency staff, but public users cannot see it in self-service.
- 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, emails, and phone numbers.

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- Contacts: people who might be added as contacts for permits that are associated with this profile.

  When adding contacts to a permit, 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.

The Public User Registration Process

Although anonymous public users can access generic information, users must register before they can apply for permits and manage their permits.

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 personal 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 is the first of two illustrations of the Register page.

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Register

* Account Use ◯ Personal   ⦿ Business

Salutation [▼]

* First Name [   ]

* Last Name [   ]

* Business Name [   ]

* Email Address [   ]

* User Name [   ]

Are You a Contractor? ◯   [Add License]

This is the second of two illustrations of the Register page.

Country [United States of America (US)   ▼]

Address Line 1 [   ]

Address Line 2 [   ]

Address Line 3 [   ]

Address Line 4 [   ]

State [🔍]

County [🔍]

City [🔍]

ZipCode [   ]

Phone [▼] [   ] Ext. [   ]

❓ Are You a Member of Law Enforcement or a Judicial Agency? ◯

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

[Register]

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Entering Registration Information

The following registration information is required:

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*.
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.
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.
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.
	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*.
Country	The default country is United States of America. Users should not change this value.
Are You a Member of Law Enforcement or a Judicial Agency?	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 individuals who serve the public in these professions will have their name and contact information masked from public view.

Page Element	Description

> ✎ **Note:** Depending on the settings on the Public User Setup page, a user's self-identification as a contractor or as a member of law enforcement or a judicial agency might need to be verified by agency staff. Verification requirements do not affect the registration process.

The following registration information is optional:

- Salutation (for example, Ms. or Mr.)
- Address
- Phone

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.

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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.

Accessing Public User Account Information

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

Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

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

Account Management Navigation for Registered Public Users

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

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

A drop-down menu appears.

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

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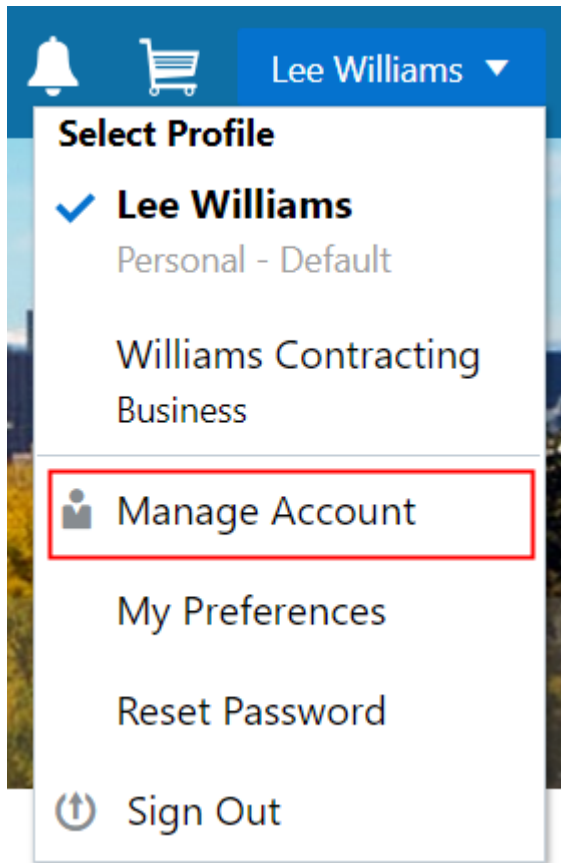
3. Select **Manage Account.**

Adding Profiles to a Public User Account

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

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

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

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Manage Account

	Profile-Lee Williams		Clone Profile	Create New Profile
Account Information				
Profiles ▼	**Profile Basics** Personal	Set a default profile, or update profile name and status.		>
Lee Williams **Personal**	**Contact Information** Added 3	Update phone number, email, and address.		>

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.

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.

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.

To clone a profile:

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

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

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

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

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

6. Click **Create.**

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

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.
5. Click **Save.**

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

Managing Public User Accounts

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

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

Public User Access Versus Agency Staff Access

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

- Public users can see the verification status for any data that requires agency verification, but only agency staff can update the verification status.

- Public users do not see the Additional Information section of an account, which displays information about membership in law enforcement or a judicial agency.

✎ **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. (Agency staff only) To view or update additional information:

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

       The Additional Information page appears.

> ✏️ **Note:** The Additional Information item is visible only if the option to track this information is enabled on the Public User Setup page. Even if this option is enabled, the Additional Information item is not visible in public user self-service.

    b. Review or update the setting for the **User is a member of law enforcement or a judiciary agency** check box.

    c. Review or update the **Verification Status** related to the check box.

    d. 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.

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	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.
Default	Select this check box to designate the profile as the default profile for the account. 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. The default profile must be active, so if you select the **Default** check box, the Status field become read-only, and the status changes to Active if it was previously Inactive.

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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 a permit application.

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.

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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.

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.

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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. ✎ **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.

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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.

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 four types of information that need to be verified:

- Whether the user is a member of law enforcement or a judiciary agency.

- Whether the user is a contractor.

- The user's licenses.

- The user's trust accounts.

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

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

This example illustrates the Public Access User page.

Public Access User

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

This example illustrates the Pending Verification Requests page.

Pending Verification Requests

Sara (null)

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

Cancel   Save

Managing Verification Requests

To find and manage pending verification requests:

1. Select **Public User,** > **Public Access User.**
2. Locate accounts with a value in the **Pending Verification Requests** column.

   This column displays the number of pending requests for the user. It's blank for users with no pending requests.

   The surest way to locate accounts with pending verifications is to sort accounts based on the number of pending requests. To sort by a specific column, click the triangle icon in the column header. Click again to reverse the sort order.

3. Click a value in the **Pending Verification Requests** column to access the Pending Verification Requests page.

   The page lists the pending verification requests for the selected user. Requests that have already been verified (or failed verification) do not appear.

4. Review the following information for the requests to be verified:

Page Element	Description
Profile Name	Displays the profile that is associated with the data to be verified.
	A user's membership in law enforcement or a judiciary agency is general account information, not profile information. A pending verification for this information is listed under the default profile name..
Type (type of request)	Explains what type of information must be verified. Values include:
	○ User is a contractor
	○ User is a member of law enforcement or a judiciary agency
	○ User added or updated license

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Page Element	Description
	○ 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 or membership in law enforcement or a judiciary agency.
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.

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# 2 **Managing Permits**

Using the Agency Springboard

The Agency Springboard provides a starting point for agency staff to manage permits throughout the permit lifecycle.

You use these elements on the Agency Springboard to perform daily tasks and manage permit transactions.

- Alerts
- I Want To
- Task Lists
- Tiles

Depending on the setup for Oracle Public Sector Permits, the Agency Springboard looks like the following example, which is configured to show the I Want To actions bar, the task list element, and a selection of springboard tiles. Similar elements may appear on the landing page for permit applicants.

This image of the sample Agency Springboard shows the global header, banner image, I Want To actions bar, task list element, and nine springboard tiles. The Alerts banner is not shown in the example.
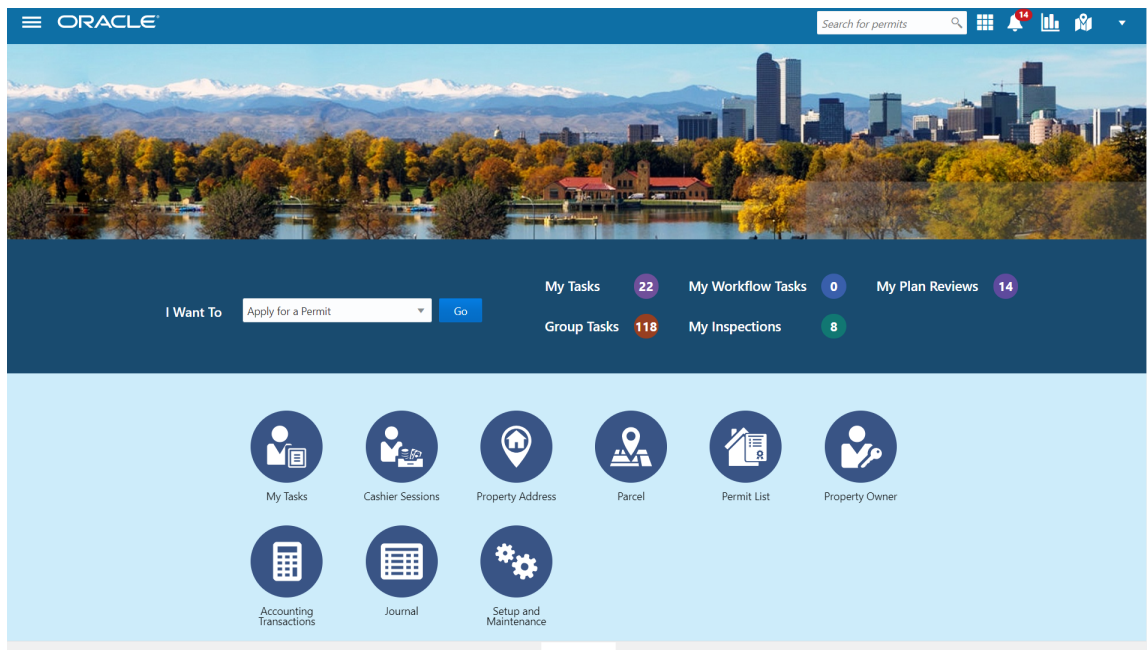
Page Element	Description
Alerts	Appear as a banner and contains messages that important information.
I Want To Bar	Appears as a drop-down list from which you choose an action, such as apply for a permit. The actions in the I Want To bar and on the tiles can provide access to the same pages.

Page Element	Description
Task Lists	Provide links to the Task Management page with predefined filters you access to manage tasks in the permit cycle workflow. The counts for each type of task help you monitor workload. For more information about tasks, see *Managing Permit Tasks*.
Tiles	Appear as icons with links to the pages you use to administer permit transactions, such as accounting, customer payments, plan reviews, inspections, conditions, and other permit details. For example, click the **Permit List** tile to open a list of permit applications. For more information, see *Managing Permit Applications*.

For information about setting up these elements on the Agency Springboard, see the guide for Implementing Public Sector Permits.

Applying for Permits

Registered public users can apply for permits online, and agency staff can assist their constituency with permit applications on the Apply for a Permit page. All users can research the different permit types using the Permit Guide, if available.

The applications for each permit type are configured by the agency during implementation.

Using the Apply for a Permit Page for Anonymous Users

Anonymous public users, or guests, can make an informed decision about the type of permit needed for their particular project without registering. They can save recommendations from the permit questionnaire for reference but must register before they can access the permit application.

This example illustrates the Apply for a Permit page for anonymous public users containing the field values described in the following table.

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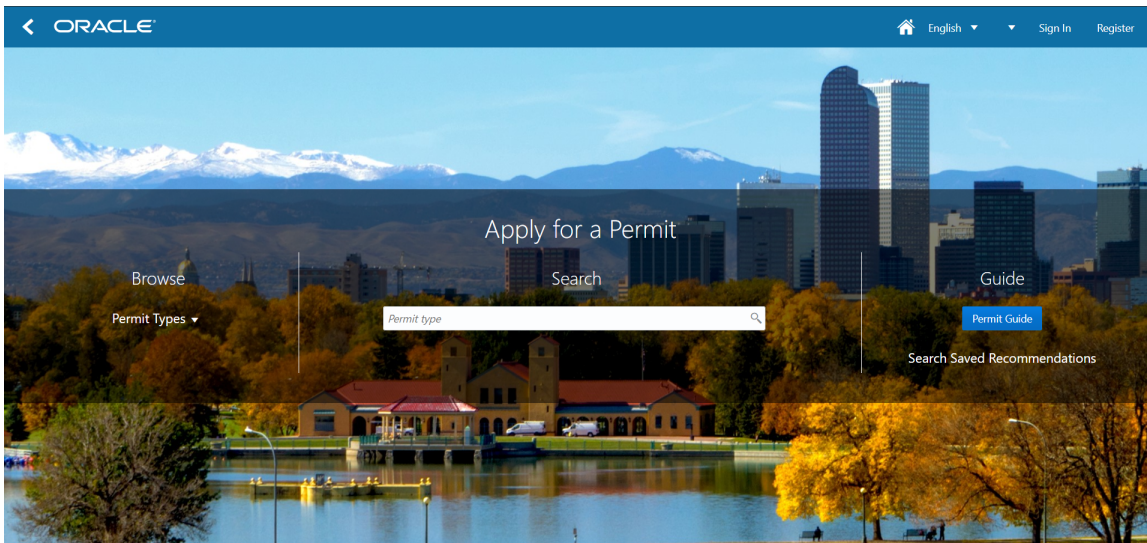
1. To navigate to the Apply for a Permit page from the guest landing page, the user clicks the **Apply for a Permit** tile.
2. On the Apply for a Permit page for anonymous users, guests can do the following:

Action	Description
Browse permit types	Click the **Permit Types** list to see the permit groups available to choose from. Guest users are prompted to log in when they click a permit type.
Search for a permit type	Search for a permit type by entering the name of the permit type or the first characters in the **Search** field. Guest users are prompted to log in when they click a permit type.
Use the permit questionnaire	Click the **Permit Guide** button to start a questionnaire that can help identify the recommended permits for a project. The Permit Guide is available only if set up by the agency using Oracle Policy Automation (OPA) or a custom implementation. The anonymous public user can save the recommendations by entering an email address. The system sends an acknowledgement number, which is used to access the saved permit recommendations later.
Search saved permit recommendations	Click the **Search Saved Recommendations** link to review previously saved permit questionnaire results. The anonymous public user can use the Permit Guide to identify the types of permits they need, save the recommendations, and access them by entering their email address and acknowledgement number.

3. If users want to apply for permits, they must first register. To register, click the **Register** link in the global header to create an account.

    For more information about registering, see *The Public User Registration Process*.

If a guest has saved permit questionnaire results, the recommended permits are transferred to their profile as a registered user.

Using the Apply for a Permit Page for Registered Users

Registered public users can view permit recommendations saved when they were a guest user, fill out the permit questionnaire to find more recommendations, and apply for the permit type of their choice.

This example illustrates the Apply for a Permit page for registered public users containing the field values described in the following table.
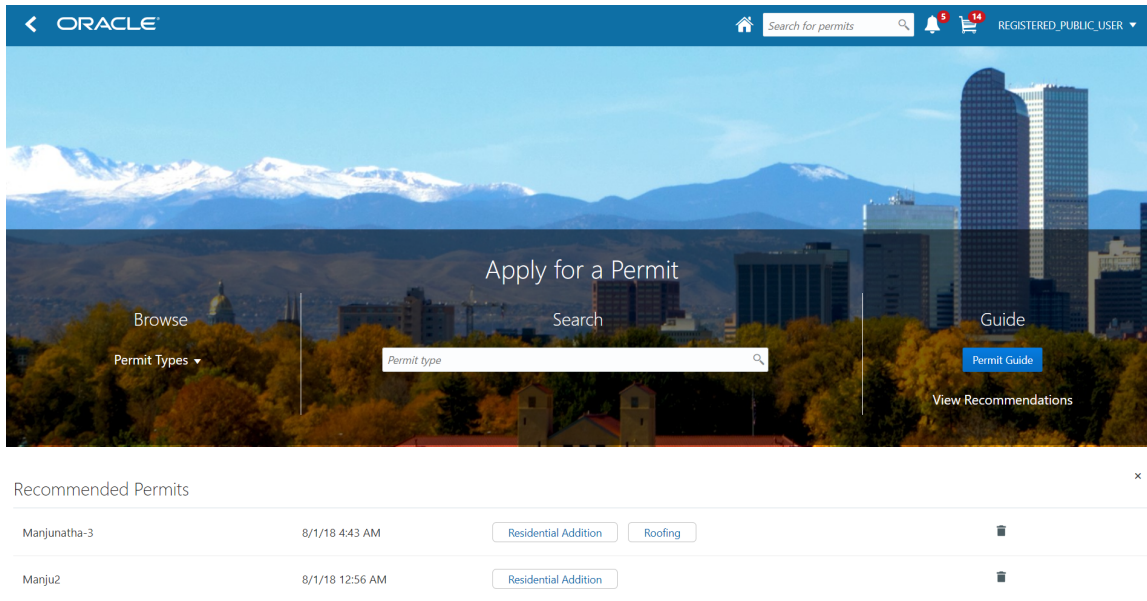
1. To open the Apply for a Permit page from the registered user landing page, the user can:

   o Click the **Apply for a Permit** tile.

   o Select the option to apply for a permit in the **I Want To** bar.

2. On the Apply for a Permit page for registered users, permit applicants can do the following:

Action	Description
Browse permit types	Click the **Permit Types** list to see the permit groups available to choose from.
	Select a permit type link to initiate a permit application.
Search for a permit type	Search for a permit type by entering the name of the permit type or the first characters in the **Search** field.
	Select a permit type to initiate a permit application.
Use the permit questionnaire	Click the **Permit Guide** button to start a questionnaire that can help identify the recommended permits for a project and save the results. The Permit Guide is available only if set up by the agency using Oracle Policy Automation (OPA) or a custom implementation.
View recommended permits	Click the **View Recommended Permits** link to open the Recommended Permits page where the registered user can review a list of saved permit recommendations.

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Action	Description
	Select the button for a recommended permit type to initiate a permit application, or click the **Delete** icon to remove the recommendation from the list.
Search saved permit recommendations	Click the **Search Saved Recommendations** link at the bottom of the Recommended Permits page to review permit questionnaire results saved before registering. Use the email and acknowledgement credentials provided while a guest user to search the previously saved recommendations.

3. The applicant information is filled in automatically from the registration form.
   The registered user proceeds step by step through the application form and clicks the **Submit** button to start the permit process.

After submitting a permit application, the registered user can review and manage permit details throughout the permit lifecycle. For more information, see *Working with Permit Details*.

Using the Apply for a Permit Page for Agency Staff

Agency staff can assist registered users with permit applications.

1. To open the Apply for a Permit page:
   ○ Select the option to apply for a permit in the **I Want To** bar on the Agency Springboard.
   ○ Go to the Permits list page and click the **Apply for a Permit** button.
2. On the Apply for a Permit page, agency staff can do the following:

Action	Description
Browse permit types	Click the **Permit Types** list to see the permit groups available to choose from.
	Select a permit type link to initiate a permit application.
Search for a permit type	Search for a permit type by entering the name of the permit type or the first characters in the **Search** field.
	Select a permit type to initiate a permit application.

3. In the first step of the permit application, the agency user selects the applicant from a searchable list. The search list includes the applicant name, business name, address, email, and phone.
   The agency user proceeds step by step through the application form and clicks the **Submit** button to start the permit process.

For more information, see *Managing Permit Applications*.

Managing Permit Applications

You view an inventory of permits with application data and status, and access detailed permit records using the Permits page.

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As agency staff, such as a permit technician, you use the Permits page to view a complete list of permit applications submitted to your agency. Go to the permit list on the Permits page to perform these tasks:

- Manage permit application activity.

- Create or update permit records on behalf of applicants.

- Manually enter fee payments on behalf of applicants.

- Access comprehensive permit record details.

✏ **Note:** The Permits page provides a permit record summary to agency staff only. Registered users who have applied for a permit for themselves, or as a representative for someone else, see only the permits that they are associated with on the My Permits page. The My Permits page contains basic permit information. The user profile controls which permits and permit data appear on the Permits and My Permits pages.

Registered users can access the My Permits page by selecting View my permits list from the actions drop-down list or by clicking the My Permits icon on the Registered User Landing Page.

Agency staff can access the Permits page by clicking the **Permit List** tile on the Agency Springboard.

Using the Permits Page

1. Select the **Permit List** tile on the Agency Springboard.
2. On the Permits page, you can perform these actions to display permits that meet specific criteria:

Page Element	Description
Download	Click the download button to export the permit list to a .csv file.
Search	Search by alphanumeric characters on the fields for permits in the list. The permits 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. You can confirm the correct permit by clicking the **Details** button for the permit and reviewing all of the associated addresses in the permit details.
Filter	Apply filters to display permits 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 permits in the list by these fields:
	○ **Permit**
	○ **Permit Type**
	○ **Status**
	○ **Created By**
	○ **Created Date**
	○ **Applicant**
List View or **Map View**	View the inventory of permits in a list or on an interactive map. See *Using Permit Maps*.

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Page Element	Description
	Click the **Details** button to access the details for the selected permit.
>	

Managing Permit Activity

1. Select the **Permit List** tile on the Agency Springboard.
2. Use the permit information on the Permits page to manage permits submitted to your agency:

Page Element	Description
Alert icon	Identify permits with a status affected by a condition or another issue, for example, hold, lock, or notice.
Permit	View the permit ID.
Status	Review the permit status, for example, Payment Pending, Submitted, Pending, and Permit Issued.
Last Updated Date	Review the date and time the permit was most recently updated.
Created By and **Creation Date**	Review the user name of the person who filled out the permit application and the date the application was submitted.
Applicant	Review the permit applicant's name. This may not be the same as the person who created the permit request.
Property	Review the street address and parcel number of the property. The permit list displays only the primary address. You can review all of the addresses associated with the permit in the details, which you access by clicking the **Details** button for the permit.
Fees	Review the fees that may be applicable to the permit and a fee balance if the total has not been paid. Once permit fees have been paid, the fees displayed are zero.
Actions	Select one of the required actions: o **Resubmit** The permit status is Pending Submit because there may be a problem initiating workflow. Click this button to retry initiating workflow. You may need to try later, or if issues still exist, contact your help desk. Resubmitting the permit does not affect the fee calculations. o **Pay** Select this button to submit a payment on behalf of the applicant.

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Creating or Updating a Permit Record

As a permit technician, you can create new permits or update existing permits. Only agency staff can update permits that have already been submitted.

If a permit has a pending status, the applicant can make updates to the permit. When the applicant selects a pending permit on the My Permits page, the service directs them back to the application form. For submitted permits, agency staff can make changes.

1. Select the **Permit List** tile on the Agency Springboard.
2. To create a new permit, click the **Apply for a Permit** button to access the permit questionnaire and submit the application.
3. To update an existing permit, click the **Details** button for the selected permit to open the pages comprising the permit details.
4. Go to the page for the information you would like to update, using the links in the left navigation panel. For example, if you want to update property information, click the **Property Information** button to open the Property Information page. Click the **Edit** button to make changes. Clicking **Done** saves the changes.

Entering Permit 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 Permits page.

1. Select **Permit List** on the Agency Springboard.
2. Click the **Pay** button for the selected permit 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 permit record details, see *Working with Fees and Payments*.

Accessing Permit Details

You can access permit application details from the Permit page.

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for the selected permit.

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

For more information about pages containing details about the permit application, see *Viewing the Permit Summary*.

Working with Permit Details

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

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

To access the permit detail pages:

1. Select **Permit List** on the Agency Springboard.

2. Click the **Details** button for a permit.
3. Navigate to permit information using the links in the left panel.

The information for a permit comprises these pages:

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

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Page Name	Description
Communication Details	Send ad hoc email messages and notifications associated with this permit. See *Working with Permit Communications*.

Viewing the Permit Summary

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

Using the Overview Page

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. Review information about the selected permit in the sections and navigate to more details on the Overview page:

Page Element	Description
Overview	Review the permit status, who submitted the application, the day the application was submitted, and the permit issue date. The applicant can enter a description of the permit record by clicking the **Add** link.
Applicant	View the applicant's name and contact information. Click the **View Details** link to open the Contacts page, where you can add additional contacts.
Workflow	View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status. Click the **View Details** link to open the Workflow page.
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.
Inspections	View the number of scheduled, upcoming, and completed inspections, as well as the number of inspections that have passed and failed. Click the **View Details** link to open the Inspection List page.

Working with Property Information

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

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

Viewing the Parcel Information

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

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, view the list of parcels in the **Parcel List** section.
4. Click the parcel number button in the list to view the parcel details, owner, and address in the right pane.
5. Click the map icon to find the parcels in the list on a map.

Adding Parcels to the Permit

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, click the **Search** icon in the **Parcel List** section.
4. Use the search field on the Search Property page to find parcels by parcel number, address, or owner. Only parcels enabled by the agency are available as lookup values.
5. Click the check boxes for one or more parcels.
6. Click the **Add Selected** button.

Updating Parcel Details

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, click the **Edit** button in the **Parcel Number** section.
4. On the Parcel Detail page, you can turn on the **Primary** switch to make this the primary parcel for the permit.
5. Update parcel data such as the property description, jurisdiction, subdivision, primary zone, zone description, land use, parent parcel, parcel type, book, section, page, map book page, map name, boundary description, and so on.
6. Click **Save**.

Updating Parcel Owner Details

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, click the owner row in the **Owner** section.
4. On the Parcel Owner Detail page, you can turn on the **Primary** switch to make this the primary parcel owner.
5. Enter a value in the **Zip Code** field to add address information.
6. You can also update the owner name, secondary owner name, ownership type, home phone, and email address.

Adding Parcel Addresses

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, click the **Search** icon in the **Address** section.
4. Use the search field on the Search Property page to find parcels by parcel number, address, or owner.

   Only parcels associated with this permit are available as lookup values.
5. Click the check boxes for one or more parcels.
6. Click the **Add Selected** button.

Updating Parcel Addresses

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. On the Property Information page, click the address row in the **Address** section.
4. On the Parcel Address Detail page, you can turn on the **Primary** switch to make this the primary parcel address.
5. Update parcel address data such as address type, address line 1, address line 2, street number, street, street type, unit, floor, direction, building, municipality, and longitude and latitude.
6. Click **Save**.

Viewing Permit Application Details

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

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

This example illustrates the Permit Details page containing the information described in the surrounding text.
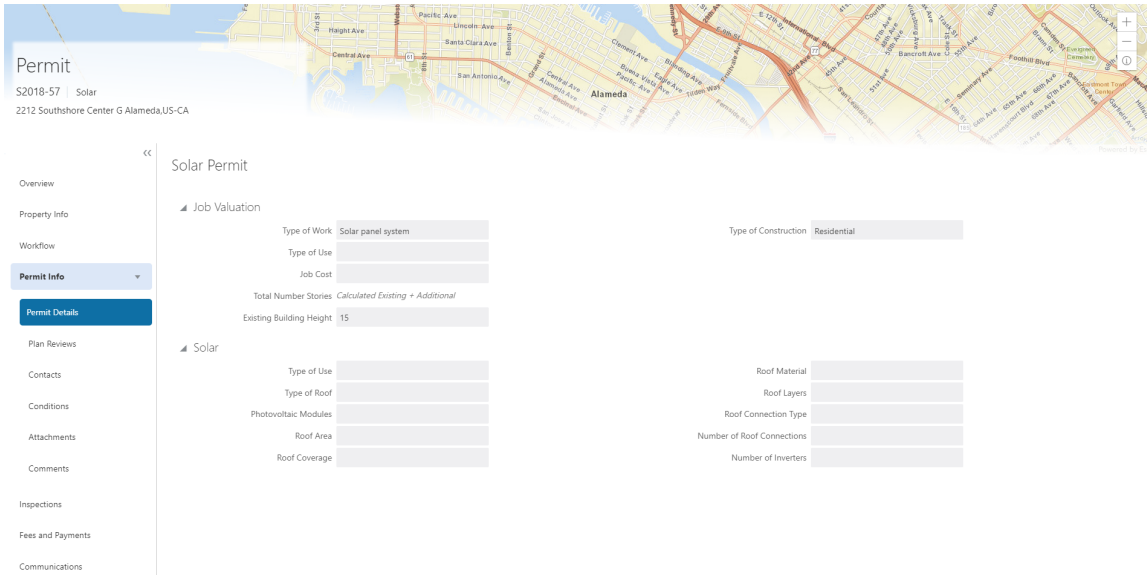
Permit Application Details	Description
Construction Information	Captures Information regarding the current construction site and the proposed construction project.
Demolition	Captures information related to the scope of the demolition and if hazardous materials or utilities need to be considered—such as electricity, gas, water, and so on—when demolition is required as part of the job.
Electrical Equipment	Describes electrical features, such as outlet types, amps, voltage, and electric appliances.
Fence Information	Describes the proposed fence attributes, such as type, material, dimensions, location, and so on.
Grading Information	Describes the scope of grading work, such as the acreage affected, materials to be used and the amount of material.
Insurance	Provides a contractor's insurance type and policy information.
License Qualification	Enables a contractor to add any state licences they have.
Mechanical Equipment	Describes features of the job site related to ventilation, heating, cooling, fire safety, and so on.
Photovoltaic Information	Describes attributes of a site's solar energy configuration, such as roof area, coverage area, inverter information, and so on.
Plumbing Equipment	Describes attributes of a site's plumbing configuration.
Pool Information	Describes attributes of a pool, such as type, depth, location, surrounding fencing, and so on.

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Permit Application Details	Description
Property Information	Describes the parcel as it is registered with the municipality, such as the parcel ID, parcel type, and so on.
Regulated Business Activity	Enables you to specify any regulated activity or controlled substances allowed on the premises, such as alcohol, carnival rides, casino games, and so on.
Right of Way Use	Enables you to provide any details related to the use of a right-of-way on the property or to gain access to the property, such as traffic, parking, or pedestrian impact.
Roof Information	Describes features of a structure's roof, such as existing roof type, proposed roof type, number of layers, and so on.
Site and Zoning	Describes features of the property related to acreage, flood preparedness, as well as zoning and land usage information.
Special Event	Enables applicants to specify information about an event, including the safety plan, concessions, facilities, potential impacts, and traffic plans.
Yard Sale	Enables applicants to specify yard sale information, such as the start time, end time, and the number of days.

Updating Permit Application Details

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

1. Select **Permits** > **Permit List** .
2. On the Permits page, select the **Details** button for a permit in the grid.
3. Click **Permit Info** to expand the section in the left navigation panel.
4. Click **Permit Details**.
5. On the Permit Details page, click the **Edit** button.
6. Update available fields on the page.
7. Click the **Done** button to save.

Using Permit Workflow

Permit workflow provides a defined structure for the permit lifecycle. Humans perform manual steps such as approving a permit application and indicating when a plan review is complete, while the workflow engine updates performs automated steps such as updating permit statuses and sending permit-related notifications.

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. For example, if workflow includes a task to review plans, you need to review the plans manually, then you record your plan review decision in the plan review pages, then you mark the workflow task complete.

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Workflow and Non-Workflow Tasks

This topic discusses the workflow tasks related to the overall permit lifecycle. Oracle Integration Cloud (OIC) provides the workflow engine for these tasks, and agency staff manages these tasks on the permit details Workflow page.

Permits also generate tasks related to plan reviews and inspections. These tasks are not driven by the OIC workflow engine, and you do not see these tasks on the Workflow page.

Oracle provides a consolidated Task Management page that agency staff can use to review both workflow and non-workflow tasks. This page enables users to review task information and to reassign tasks (including claiming a task for oneself). For information about this functionality, see *Managing Permit Tasks*.

Managing Permit Workflow Tasks

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

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

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

Page Element	Description
Reassign	Click to choose an assignee for the task. See *Managing Permit 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 your workflow setup. For example, the available statuses for a task that requires a simple approval might be Approve and Reject. Other tasks might require different statuses. The sample permit workflow that Oracle provides includes these statuses for the task where you review a permit application:

Page Element	Description
	Accepted - Plan Review Not Required, Accepted - Plan Review Required, More Info Needed, and Reject.

> ✎ **Note:**
> Task statuses are not the same as permit status. However, the workflow engine can update the permit 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:

   o Sends an update to the workflow engine in Oracle Integration Cloud, 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.

   o Refreshes the Workflow page, which becomes read-only if the task is complete.

   o 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 permit.

   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 permit 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 permit comments, see *Working with Permit 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 comment are described in the topic *Working with Permit 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.

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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 **Delete.**

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

Viewing the Overall Workflow for a Permit

Use the list view on the Workflow page to view all of the workflow tasks that a human must perform for a specific permit. This list does not include system tasks such as updating the permit 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 permits. The list view is read-only, so public users are never able to update tasks.

To use the list view:

1. Select **Permit** > **Permit List.**
2. Select a permit row and click the chevron.
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.

Managing Permit Tasks

Permits-related tasks include workflow tasks related to the overall permit lifecycle as well as non-workflow tasks related to plan reviews and inspections. The Task Management page enables you to review both workflow and non-workflow tasks and to reassign tasks (including claiming a task for yourself).

Reviewing and Managing Tasks

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

Task Tab	Description	Available Actions
	are assigned to you and to other group members.	

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

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. It is not relevant on the
   ○ **Release** removes the assignment without assigning a new owner. The task will now appear on the Group Task list until it is claimed or reassigned.
   ○ **Reassign** opens the Reassign Task page, where you can select a new assignee.

Reassigning a Workflow Task

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

To reassign a workflow task:

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

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

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

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

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

Adding Contacts to Permit

This topic discusses how to add contacts to a permit. Users can add contacts to a permit after the permit is submitted.

Adding Contacts to a Permit – Procedure

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

- Add from Registered Contacts: You just select a contact already registered in the system and include in the permit.

- Add Brand New Contact Manually: You create a new contact by entering all the contact details and then include in the permit.

✎ **Note:** Applicants can add additional contacts at the time of filling the permit application. See the documentation section for details on adding additional contacts while applying for a permit.

1. Select **Permit** > **Permit List** . Select a Submitted permit row and click the chevron.

    Select **Permit Info** > **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 permit.

     o 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 permit.
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.

     o To create a brand new contact, click Create New Contact and manually enter all contact details.

3. Update the additional contacts by clicking the chevron on a contact from the Additional Contacts list.

     o For registered contacts, the following fields are not available for edit: First Name, Middle Name, Last Name, and Business.

     o For newly created contacts, all the fields are available for edit.

4. Click **Save** to save the contact and return to the Contacts page, which lists your contacts.

Applying Conditions to Permit

This topic describes how your Public Sector Cloud service allows you to view, update, apply, and resolve conditions on a permit.

Viewing and Updating Conditions

The Conditions page lists all the conditions applied to the selected permit, 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 Permits and appears if one or more active conditions are applied. A condition is active until it is changed to Resolved.

1. Select **Permit** > **Permit List** > **Select a permit row** > **Condition** .

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

This example illustrates the Conditions page.
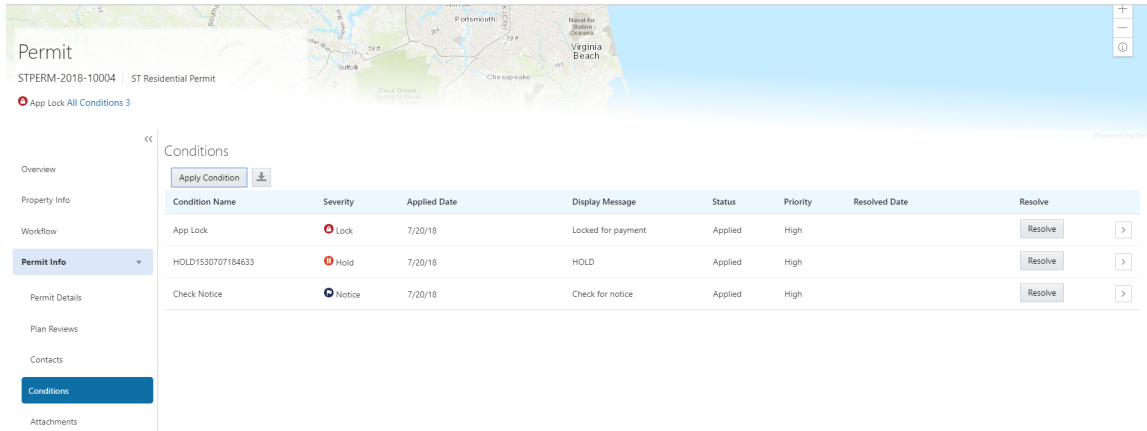
2. Select a condition and click the chevron to open the Condition Details page and view the details of the condition. For a detailed description of all the fields, see the Apply Condition to Permit section.

3. You can also edit the values and click Save to update the condition.

Applying a Condition to a Permit

You apply conditions to permits on the Apply Condition page.

1. Select **Permit** > **Permit List** > **Select a permit row** > **Conditions** > **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	This level functions as an alert and has no effect on operations.

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Page Element	Description
Notice	
Business Rules	Select one or more business rules. Options are:

o   Prevent Workflow Advancing

o   Restrict Payment

o   Prevent Inspection Schedule

o   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 permit.
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.

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 permit.

1. Select **Permit** > **Permit List** > **Select a permit row** > **Conditions** .

    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.

Viewing a Resolved Condition

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

1. Select **Permit** > **Permit List** > **Select a permit row** > **Conditions** .
2. Select a row with a status of **Resolved** and click its chevron.

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

   o Applied By

   o Resolution Action

   o Resolved By

   o Resolved Date

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

Working with Permit Attachments

Attachments provide supporting documentation needed by agency staff to determine if a permit can be issued. You view a list of files and upload or download documents on the Attachments page.

Viewing Permit Attachments

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

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for a permit to access the permit details.
3. Click **Permit Information** in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit.
5. On the Attachment page, view the list of permit 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 and perform an action: o View Details o Download o Delete

Adding Permit Attachments

You upload files to the Attachments page for a permit using the Add Attachments page. Inspectors can also add attachments in Oracle Inspector.

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for a permit to access the permit details.

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3. Click **Permit Information** in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit.
5. Click the **Add New** button.
6. Select the file to upload in the browser dialog box and click **Open**.

    The filename appears on the Add Attachments page.
7. On the Add Attachments page, enter a description of the file (optional), a document category, and a document subcategory.

    You must enter document categories and subcategories that have been defined by the agency. See the implementation documentation for setting up attachment document categories and subcategories.
8. Click the **Upload File** button.

Downloading Permit Attachments

You download an attachment file for a permit on the Attachments page.

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for a permit to access the permit details.
3. Click **Permit Information** in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit.
5. In the attachments grid, click the **Action** button for the attachment you want to download.
6. Select Download.

Deleting Permit Attachments

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

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for a permit to access the permit details.
3. Click **Permit Information** in the left panel.
4. Click the **Attachments** link to view the Attachments page for the permit.
5. Click the **Edit** button.
6. Select one or more attachments to delete.
7. Click the **Delete** button.

You can also delete a single attachment on the Attachments page by selecting Delete in the **Action** menu for the attachment you want to delete.

Working with Permit Comments

This topic discusses how to use Comments. You can view, edit, and add comments.

Adding Comments for a Permit: Overview

You view, edit, and add new comments on the Comments page. You can mark comments you use regularly as your favorite and access them easily from the Favorite comments tab. You can also select and post a comment from the Standard comments tab, which lists all the pre-defined comments. In addition, Recent comments tab allows you to select and post comments from a list of recently posted comments.

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Viewing and editing Comments

1. Select **Permit** > **Permit List** > **Permit Info** > **Comments** .

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

   This example illustrates the Comments page.
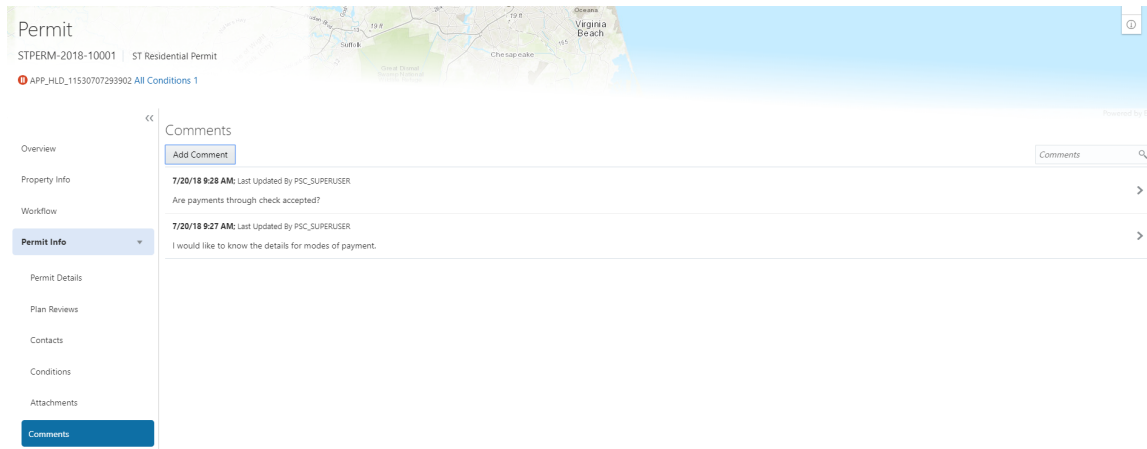
2. To view the details of a comment entered earlier click the record's chevron.

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

Adding a new comment

1. Select **Permit** > **Permit List** > **Permit Info** > **Comments** .

   Click the **Add Comment** button to open the Add Comment page and enter a new comment. You can choose to use the **Rich Text Editor** option for formatting your comment. See Managing Comments documentation to enable the option of **Rich Text Editor** formatting.
2. Click **Post** to post the comment and return to the Comments page.

Adding Favorite, Standard, and Recent Comments

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

   The Favorite tab lists all the comments you have marked as favorite. The Standard tab lists all the predefined comments available in the Permit system. The Recent tab lists all the comments that were recently posted.
2. Select a comment from any of these three categories and click the **Insert** button to post the comment.

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

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Working with Fees and Payments

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

Fees are calculated based on agency fee setup. For more information about setting up automatic fee calculations based on permit type, see "Creating Decision Models for Fees" in the Implementing Oracle Public Sector Permits documentation.

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

Fees and Payments

Fee Description	Amount	Currency	Status	Department	Assessed Date	Payment Date	Payment Reference	Invoice	
Application Fee	25.00	USD	Paid	2002	7/30/18	2018-07-30	PAY_20180731T023400135Z218100	STINVO-2018-10010	>
Application Fee	25.00	USD	Paid	2002	7/30/18	2018-07-30	PAY_20180731T025805328Z606929	STINVO-2018-10012	>
Electrical Fees	148.80	USD	Hold	2002					>
Plan Review	286.54	USD	Paid	2002	7/30/18	2018-07-30	PAY_20180731T023400135Z218100	STINVO-2018-10010	>
Plan Review	286.54	USD	Paid	2002	7/30/18	2018-07-30	PAY_20180731T025805328Z606929	STINVO-2018-10012	>

Total Fees	$771.88	USD
Total Payable	$623.08	USD
Total Paid	$623.08	USD
Balance Due	$0.00	USD

Viewing Fees and Payments for a Permit

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for a permit to access the permit details.
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 permit.
4. On the Fees and Payments page, view a list of fees, including this information:

Page Element	Description
Fee Description	The description of the fee item as defined when creating a fee item.
Amount	The amount due for each fee item.
Currency	The currency in which the transaction will be paid.
Status	o Canceled: Indicates the fee payment is no longer required. o Pending: Indicates the payment transaction is currently in process. o Hold: Indicates the fee requirement has been put on hold until an issue or condition associated with the permit application or inspection has been resolved. o 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.

Page Element	Description
Payment Date	The date payment was received.
Payment Reference	The payment reference issued for the transaction.
Invoice	The invoice number of the agency associated with the permit application.
Total Fees	The total amount of fees that may be applicable to the permit application.
Total Payable	The amount of fees that are designated as payable. Fees that are not payable include fees on hold, for example.
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.

Adding a Fee Item

Using the Fees and Payments page, you can add additional fees to a permit application if the situation arises, such as a late fee, an unforeseen processing fee, an addition to the project request, and so on. The **Add Fees** button is not available when the permit status is Pending Payment or Pending Submittal.

To add a fee item:

1. Click **Add Fees** in the Fees and Payments grid to display the Add Fee Item page.
2. Select the appropriate fee from the **Fee Item** lookup list.
3. Enter the fee required for the item in the **Amount** field.
4. Set the status of the fee item using the **Status** drop-down list, such as Due.
5. Use the **Department** lookup list to select the department to collect the fee.
6. Set the appropriate date for the fee item using the **Assessed Date** field.
7. Use the **Memo** field to add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the permit process.
8. Click Save.

Paying a Fee

To add a payment to a requested fee item, 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*.

Working with Permit Communications

Ad hoc message enable agency staff and permit applicants to maintain correspondence during the permitting process.

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Agency users can send ad hoc emails and notifications on the Communication Details page. Agency staff and permit applicants can also use the Communication Details page to view a record of the messages associated with a specific permit.

Sending Permit Communications

1. Select **Permitting** > **Permit List** .

   On the Permits page, select a permit.

   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.
	
	  ○ Notification: Generates a notification that appears when users click the notification icon in the application.
	
	 ✎ **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
	
	  ○ Public user
	
	  ○ Agency staff only

MIME Type (Multipurpose Internet Mail Extensions type)	Select the format of the message. Values are:
	
	  ○ HTML
	
	  ○ Text

Notification Priority	Turn this switch on to display the notification at the top of the notification list. ✎ **Note:** This field appears only for the Notification channel type.
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 Notification channel type.

Page Elements	Definition
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 permit associated with the message is included in the body text.
From	Enter the email address or user ID of the person or organization who is sending the generated email. ✎ **Note:** Enter email addresses for the Email channel type, and user IDs for the Notification channel type.
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.
To	Enter the email addresses or user IDs of the people or organizations that you want to receive the message. ✎ **Note:** Enter email addresses for the Email channel type, and user IDs for the Notification channel type.
Cc	Enter the email addresses of the people or organizations that you want to receive a copy of the message. ✎ **Note:** This field appears only for the Email channel type.
Subject	Enter a brief description of the purpose and content of the message.
Message Body	Enter the main body text of the message.

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Page Elements	Definition
	For 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 Permit Communications

1. Select **Permitting** > **Permit List** .

   On the Permits page, select a permit.

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

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 **Details** button to view detailed information about the message.

Using Permit Maps

Maps provide a convenient way for both agency staff and public users to see permit locations. All users can explore permit locations, and registered public users can additional filter the map to show only the user's own permits.

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

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

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Explore Your City
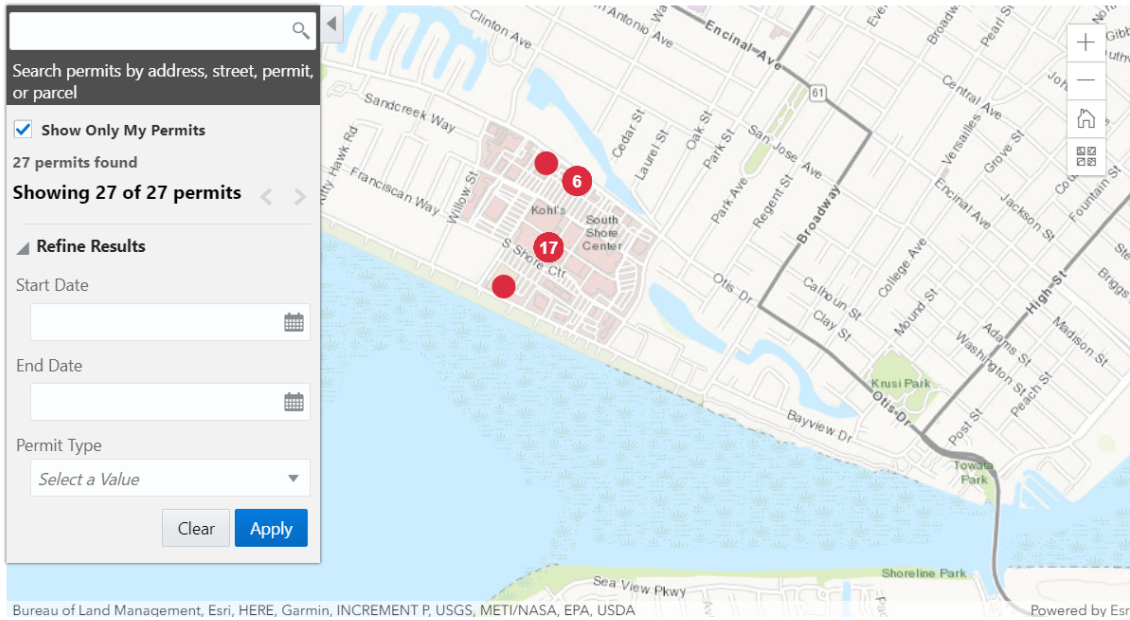
Pages With Maps

The following table describes how you use the maps that are available in various contexts:

Page and Users	Navigation	Usage
Main Map page (agency staff)	Click the **Main Menu** icon in the page header.	View permit locations on a map. Search permits by address, street, permit number, or parcel number, and filter permits by start date, end date, and permit type.
Explore Your City page (anonymous and registered public users)	Click the **Explore Your City** tile on the landing page.	All public users can view permit locations on the map. They can search permits by address, street, permit number, or parcel number, and they can filter permits by start date, end date, and permit type. A registered user who signs in can additionally filter permits so that only the user's own permits appear on the map.
• Permits page (agency staff) • My Permits page (registered public users)	• Agency staff: click the **Permit List** tile on the agency springboard, then click the **Map View** icon on the Permits page. • Registered public users: click the **My Permits** tile on the public user landing page, then click the **Map View** icon on the My Permits page.	View markers for permits that are located in the area shown on the map. This page has options for sorting, searching and filtering permits. The page also has a left frame that lists the permits, and clicking a specific permit zooms the map to the permit location.

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Page and Users	Navigation	Usage
All permit details pages for an individual permit (agency staff and registered public users)	From the Permits or My Permits page, access an individual permit in the permit list.	If the permit is associated with a parcel address, the map at the top of the page includes a map marker to indicate the primary address for the permit. If the permit is not associated with a location, the map displays a default area that your agency configures.
• The Property section of a new permit application (agency staff and registered public user) • The Property Information page of an existing permit (agency staff and registered public users)	• Start a new permit application, and continue until you reach the **Property** section. Click the **Find Parcel on Map** icon. • Access the permit details for an existing permit, and click the **Property Info** link to display the Property Information page. Click the **Find Parcel on Map** icon in the Parcel List section.	Locate the parcel to be associated with a permit and then easily add it to the permit. ✏ **Note:** This map is sometimes referred to as the "property picker" map.
Parcel detail pages (agency staff)	Click the **Parcel** tile on the agency springboard to access the parcel list, then drill into an individual parcel	The map above the parcel detail pages displays a marker at the parcel address.
Address detail pages (agency staff)	Click the **Property Address** tile on the agency springboard to access the address list, then drill into an individual address.	The map above the address detail pages displays a marker at the specified address.

Map Tools

The following table describes elements such as map markers and search options that relate to displaying permits on maps:

Map Element	Description
Map marker identifying a the location of an object such as a permit or an address.	Red indicators mark the locations of permits and other mapped objects. Click a permit marker to open a pop-up window with additional permit information such as the permit number, permit type, and the address for the property. The location of the pop-up window depends on the docking settings in the map profile. The window has a **Zoom** button for zooming in on the permit location and a **Go** button for navigating to the permit detail pages. When a map such as the Main Map shows multiple permits for a location, the map marker is a red dot that shows the number of permits. The pop-up window for this type of marker has controls for scrolling through the permits.
Permit search on the Main Map and Explore Your City pages.	• Use the search field to search permits by address, street, permit number, or parcel number. • (Registered public users only) Select the **Show Only My Permits** check box to display only the user's own permits, regardless of any other search or filter criteria. • Use the Previous (<) and Next (>) icons to access additional permits if there are more than 200 permits in the current set.

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Map Element	Description
	The text "Showing <number> of <total> permits" indicates whether there are additional permits to view.
	• Expand the **Refine Results** section to access fields that filter permits based on the **Start Date, End Date,** and **Permit Type.**
Permit search, filter, and selection on the Permits and My Permits pages.	The search and filter options work the same in the permit list's map view as they do in the regular list view.
	The map view includes a left frame with a list of permits, and you can click a permit to zoom to its marker on the map.
Permit search and selection on the property picker map.	The property picker map has a single search field where the user can enter an address to locate a specific property.
	To select a property, the user simply clicks in the polygon that defines the property location.

The following generic map tools relate to the map itself, without regard to any permits. These tools appear as icons on a floating toolbar. The map profile configuration controls which tools are available on each map, except that maps in page headers do not include any of tools except the zoom in and zoom out tools.

Image	Name	Description
	Zoom In and Zoom Out	These standard zoom controls are available for all maps. You can also double-click a map location to zoom in.
	Show Default Map View	Click to restore the map to its default display area.
	Select Base Map	Click to display a pop-up window with a gallery of map options such as Streets or Topographic.
	Select Layers	Click to display a pop-up menu for changing the visibility of various of map layers. Examples of layers include environmental, zoning, or infrastructure information provided by the map service. To hide the pop-up menu, click the icon again.
	Show Attribution (for maps in page headers)	Click to display a pop-up window that identifies the third-party map sources. Some maps have this icon, while other maps display attribution information across the bottom of the map page.

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Image	Name	Description
ⓘ	Identify GIS Information (for maps that are not in page headers)	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 icon again to turn off the option to identify GIS information. The location of the pop-up window depends on the docking settings in the map profile.

Agencies use map profiles to configure whether the **Show Default Map View, Select Base Map, Select Layers,** and **Identify GIS Information** icons are available on specific maps. The icons for zooming and for showing the map attribution are not configurable.

Using the Property Picker

On the property picker map, clicking a parcel on a map retrieves the parcel identifier from the map service. This value is used as criteria for searching the Parcel table, and the search results appear in a modal window. As long as the parcel number has a unique match in the Parcel table, the search results include just one value, representing the selected parcel. From the search results window, you can select the parcel and add it to a permit.

To select a parcel using a map:

1. Access the page where you select a parcel to associate with a permit..

   You select parcels on these pages:

   - On the permit application, in the **Property** section.

   - On the permit details Property Information page, in the **Parcel List** section.

2. Click the **Find Parcel on Map** icon to open the map-based property picker.

   This example illustrates the **Find Parcel on Map** icon on the permit details Property Information page of an existing permit.

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Property Information

No Parcel information exists

Parcel List
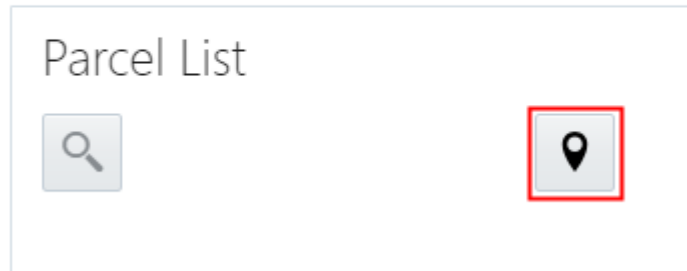
3. Use map tools such as searching or zooming to locate the parcel on the map.
4. Click the parcel.

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

   The selected parcel is now added to the permit.

3　Reviewing Permit Plans

Managing Plan Review Cycles

Building projects require a permit plan review to evaluate the projects before permits are issued. You perform administrative tasks for review cycles as a plan coordinator on the Plan Review page.

The plan coordinator manages the plan review cycle, which is a building plan review completed by multiple reviewers representing different departments. As a plan coordinator, you perform these review cycle tasks on the Plan Review page in the permit details component:

- Add plan review cycles.
- Cancel plan review cycles.
- View the different plan review cycles.

Plan Review Cycle Workflow

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

Plan review cycles for a permit are automatically closed when the last reviewer provides a decision status for a permit. Upon closing, the overall review status changes to Complete, the plan coordinator receives a notification, and the status of assigned tasks is updated on the Task Management page. The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: Rejected, Revision Required, Approved with Comments, Approved, and Not Required. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

The applicant receives an email notification when the plan coordinator cancels the review cycle or the plan review cycle is closed. The plan coordinator, similar to the applicant, also receives a notification if the plan review is canceled, but the status is only updated at the cycle level.

Adding Plan Review Cycles

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

1. Select **Permit List** on the Agency Springboard.
2. On the Permits page, select the **Details** button for a permit record.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Add Review Cycle** button to add a new plan review cycle.
   This button is available only when:
   - You're adding the first plan review cycle for a permit.
   - All other plan review cycles for the permit are complete or canceled.
5. For the initial plan review cycle, the default review cycle name is the Permit Type value, but you can enter a different cycle name on the Add Review Cycle page.
6. If you are resubmitting a plan review, select the check box on the Add Review Cycle page to copy the reviewers from the most recent review cycle.

7. Click the **Add** button.

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

Canceling Plan Review Cycles

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

Canceling a cycle sets the review cycle status to Canceled. After canceling, the cycle and review details are read-only.

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

    This button is available only when the plan review cycle is In Progress.

Viewing the Different Plan Review Cycles

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

1. Select **Permit List** on the Agency Springboard.
2. On the Permits page, select the **Details** button for a permit record.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. Click the **Change Cycle** link in the plan review header details.

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

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

Assigning Plan Reviewers

The agency's plan coordinator assigns or removes plan reviewers from different departments on the Plan Review page in the permit record details.

Adding Plan Reviewers

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

1. Select **Permit List** on the Agency Springboard.
2. On the Permits page, select the **Actions** button for a permit record.
3. In the navigation panel, select **Permit Information** > **Plan Reviews** .
4. In the **Add Plan Reviewer** field, enter a reviewer name and select from available reviewers in the drop-down list.
5. Click the **Add Reviewer** button.

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

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

6. Repeat steps 4 and 5 to add more reviewers.

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

Removing Plan Reviewers

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

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

   You can remove reviewers when:

   ○ The plan review cycle is active.

   ○ The reviewer's status is In Progress.

   ○ You entered an override decision for a reviewer, but the reviewer did not enter comments or a decision before the override.

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

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

Performing Plan Reviews

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

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

An agency's plan coordinator can also override a plan reviewer's decision on the Plan Reviewer Decision Details page.

The plan review functionality derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status. If plans have one or more rejections, or revisions are required, the applicant must correct the plans and resubmit them for another review cycle.

Viewing Plan Reviews Assigned to Me

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

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

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

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3. Plan review assignments appear in the task grid. Click the **Details** button for a permit record to open the Plan Reviews page.

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

Adding a Plan Review Decision

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

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

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

   You can select from these system-defined decision statuses:

   o Approved

   o Approved with Comments

   o Revision Required

   o Rejected

   o Not Required

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

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

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

Overriding Plan Reviewer Decisions

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

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

1. Select **Permit List** on the Agency Springboard.

2. On the Permits page, select the **Details** button for a permit record.

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

4. In the **Reviewers** grid, click the **Details** button for the selected plan reviewer.

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

   You can select from these decisions:

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

6. Click the **Save** button.

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

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

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4 Working with Permit Inspections

Managing Inspections for a Permit

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

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

- Manage inspection activity.

- View a inspections in a calendar format.

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

Monitoring Inspection Activity

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for the permit you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.
4. On the Inspection List page, you can monitor inspection activity in these fields:

Page Element	Description
Inspection	View the inspection number that was automatically generated based on the autonumbering definition in the inspection type.
Type	View the inspection type assigned to the inspection. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of

Page Element	Description
	inspection checklist, and so on. For more information, see the implementation topic, "Setting Up Inspection Types."
Status	View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:
	○ Requested
	○ Scheduled
	○ Completed
	○ Canceled
Result	View the final result of the inspection based on the passing rule defined by your agency. If scoring is used, the result appears after the inspector completes the inspection checklists and submits a complete inspection with required signatures. If scoring is not used, the result displayed is the result entered by the inspector.
Score	View the inspection score, if scoring is used, as defined on the inspection type. The score is calculated from the inspector's entries for the checklist items.
Rating	View the inspection rating, which is based on the range of scores defined by the agency.
Major Violation	Identify the number of major violations on the inspection.
Inspector	Identify the inspector assigned to the inspection.

Viewing the Inspection Calendar

You can view the inspections for a permit in the list format or on a calendar. To view the inspections on a calendar, follow these steps:

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for the permit you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.
4. On the Inspection List page, click the calendar view button above the list grid:

Page Element	Description
	Click this button to view inspections on a calendar. Click the inspection entry in the calendar to view more inspection information.

Performing Actions from the Inspection List

1. Select **Permit List** on the Agency Springboard.
2. Click the **Details** button for the permit you are working with.
3. Click **Inspections** in the left navigation panel of the permit details.

4. You can perform these actions from the Inspection List page:

Page Element	Description
Request Inspection	Click this button to request an inspection on the Inspection Request page. See *Requesting Inspections*.
Schedule	Click this button to review or change the inspection schedule on the Inspection Request page. See *Requesting Inspections*.
>	Click the **Details** button to view the inspection details. See *Reviewing Inspection Details*.

Requesting Inspections

Agency users and registered public users can request inspections for specific permits to ensure that they are in compliance. You request, modify, and cancel inspection requests on the Inspection List page.

Requesting an Inspection

1. Click **Permit List** on the Agency Springboard, or select **Permitting** > **Permit List** .

   Click the **Details** button for the permit for which you want to request an inspection.

   ✏️ **Note:** You can request inspections only for permits with a status of Permit Issued, Inspection, or About to Expire.

   Click **Inspections** in the navigation bar.
2. On the Inspection List page, click **Request Inspection**.
3. On the Inspection Request modal page, select the **Type** of inspection that you want to schedule and click **Continue.**

   ✏️ **Note:** The inspection types available to select are determined by the inspection group that is associated with the permit type.

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

Page Element	Description
Comments	Enter any comments for the inspection.

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Page Element	Description
Address	Displays the address associated with the inspection. For new inspection requests, this field displays the default address associated with the permit record. The default address is the primary address for the primary parcel associated with the permit record.
Change Address	Click to associate the inspection with another address that is already defined for the permit record. ✎ **Note:** This button appears only if multiple addresses have been defined for the permit record.
Inspection Location	Enter location information associated with the inspection.
Location Contact	By default, the system populates this field with the name of the permit's applicant. You can update this field with a different contact name.
Contact Method, Email, and **Phone**	Select a contact method from the following values: ○ None ○ Email When you select this value, the **Email** field becomes available. Use it to enter the contact's email address. ○ Phone When you select this value, the **Phone** field becomes available. Use it to enter the contact's phone number.

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

> ✎ **Note:** The dates and times that are available for inspection scheduling are based on the district of the parcel, the inspector assigned to the district, and the inspector work schedule.

6. Click **Save**.

Modifying an Inspection Request

1. Select **Permitting** > **Permit List** .

   On the Permits page, select a permit with any status other than Pending. Selecting a permit with a Status of Pending accesses the Permit Applicant page.

   Click Inspections in the navigation bar.
2. On the Inspection List page, click **Schedule** for the inspection that you want to modify.
3. Update the field values on the Inspection Request page.

> ✎ **Note:** You cannot edit the **Inspection Type** field.

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4. If an inspection time has already been selected, you can click **Select a Different Time** to select a different inspection date and time.

5. Click **Save**.

Canceling an Inspection Request

1. Select **Permitting** > **Permit List** .

   On the Permits page, select a permit with any status other than Pending. Selecting a permit with a Status of Pending accesses the Permit Applicant page.

   Click Inspections in the navigation bar.

2. On the Inspection List page, click **Schedule** for the inspection that you want to cancel.

3. Click **Cancel Inspection**.

   > 🖉 **Note:** You cannot cancel inspection requests with a status of Canceled or Completed.

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

5. Click **Confirm**.

Viewing Assigned Inspections

Inspectors access property inspections assigned to them on the Task Management page and can access inspection details.

You view a list of scheduled inspections assigned to you on the Task Management page on your desktop or laptop.

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

For information about inspection scheduling, see *Requesting Inspections*.

Viewing Inspections Assigned to Me

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

1. Select the **My Inspections** link on the Agency Springboard.

2. The Task Management page opens with a predefined filter to select tasks with the Inspection type.

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

   Inspection assignments appear in the task grid.

3. Click the **Details** button for a permit record to open the Inspection Detail page.

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

Reviewing Inspection Details

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

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

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

Reviewing the Inspection Details for a Permit

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

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

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

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

Viewing Inspection Results

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

The inspector evaluates a building site for adherence to codes and regulations required for a permit. The agency can setup up inspections to use manual scoring or automatic score calculation with the bottom up scoring method. Scoring bottom to

top indicates that the inspector starts with a zero score and adds points for each criterion that is met. The higher the score, the better the results.

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

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

- Overview page

- Inspection List page

- Inspection Detail page

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

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

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

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Inspection

MBL-180814-00037
MBL_INSTYPE_4

GAB0716A
PF_GP-00003-JUL17

«

Details

Inspection Detail

View Summary Report

Address 2212 SOUTHSHORE CENTER C
,ALAMEDA, ,,06001 ,,US-CA USA

Inspection Location

Schedule

Status Completed

Schedule Date 01:00 AM, Wednesday, Aug 15, 2018
ETA 01:00 AM

Last Updated Date 10:07 AM, Tuesday, Aug 14, 2018
Last Updated By First.Last

Result

Result	Yes	Rating	F	Score	25	▶ 1 Major Violation

Contact

Inspector First Last
Location Contact Tester Art Van Ganger

Comments

Signature

| *Inspector | First Last | | ⟩ |
| Signed | 11:13 PM, August 14, 2018 | | |

| Contractor | First Last | | ⟩ |

| Owner | First Last | | ⟩ |

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

5 Using Oracle Inspector

Oracle Inspector Overview

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

Oracle Inspector provides government field staff the ability to enforce code compliance using productivity tools to perform and report on inspections from a mobile device.

> ✎ **Note:** You must download the Oracle Inspector application for your mobile device from the iOS App Store for Apple iOS devices or Google Play for Android devices. For information about installing the application and configuring the agency's host URL, see "Public Sector Compliance and Regulation: Installing and Configuring Oracle Inspector," available in My Oracle Support. Agency administrators must explicitly grant mobile application access to the necessary agency user roles. For information about security, see the documentation for Implementing Oracle Public Sector Permits, "Configuring Security," located in the Oracle Help Center.

Viewing My Inspection Tasks

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

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

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

- View the inspection status and results for completed inspections.

- Identify inspections with conditions or restrictions.

- Review the inspection results for completed inspections.

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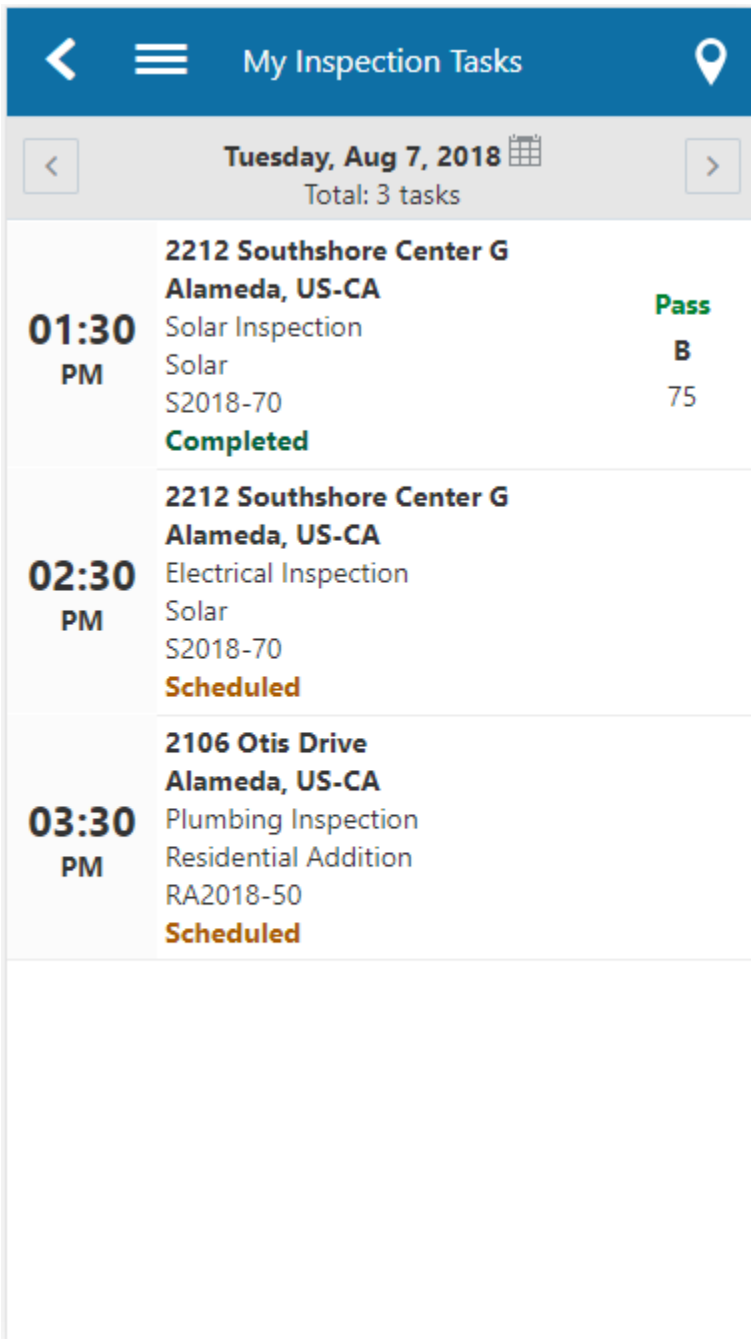
The My Inspections Tasks page provides a daily calendar view with inspections organized by scheduled time.

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

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

To update your estimated time of arrival at the property, swipe an inspection from left to right. Click the **Update ETA** button.

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

Working with Inspection Details

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

- Access permit details associated with the inspection.

- Locate the inspection site on a map.

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

- Identify the inspector and location contact.

- Read requester comments and special location instructions.

- Update your estimated time of arrival at the property.

- View the inspection summary report.

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

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

- Location
- Status
- Scheduled date and time
- Estimated time of arrival (ETA)

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- Inspector
- On-location contact person
- Comments added by the inspection requester

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

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

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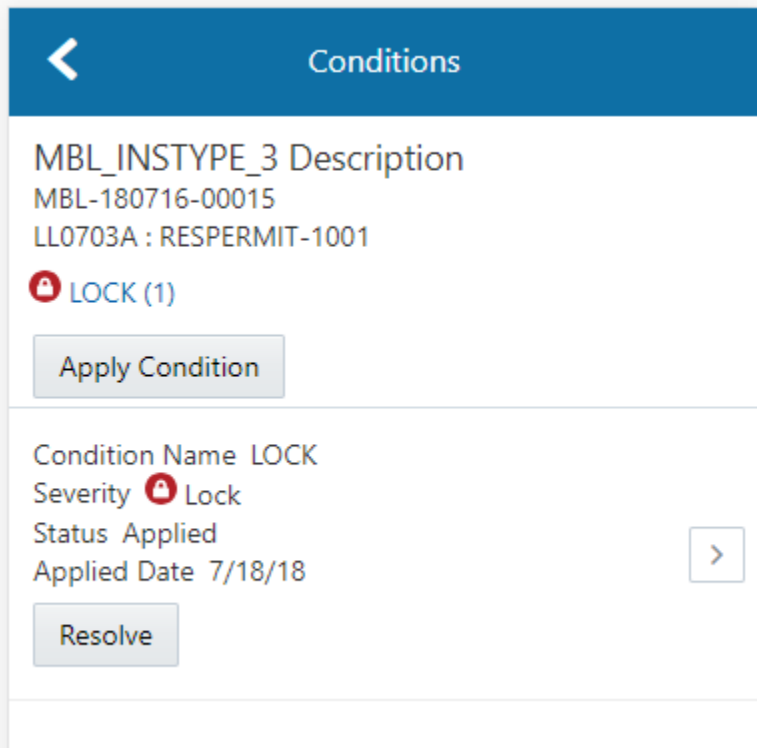| Page Element	Description
Submit	Click this button to access the Inspection Result page, where you sign off on the inspection and submit signatures for the contractor and property owner, if required.

Working with Conditions

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

- Review existing conditions applied to the permit.
- Review condition details.
- Resolve existing conditions.
- Apply new conditions.

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

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

Page Element	Description
Apply Condition	Click this button to add a new restriction to the permit.

Page Element	Description
	See *Applying Conditions to Permit*.
Resolve	Click this button to resolve the restriction that was applied to the permit.
>	Click the detail icon to access condition details. You can resolve the condition on the details page.

Opening the Map View

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

- My Inspection Tasks
- Inspection Detail

The map icon looks like this:

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

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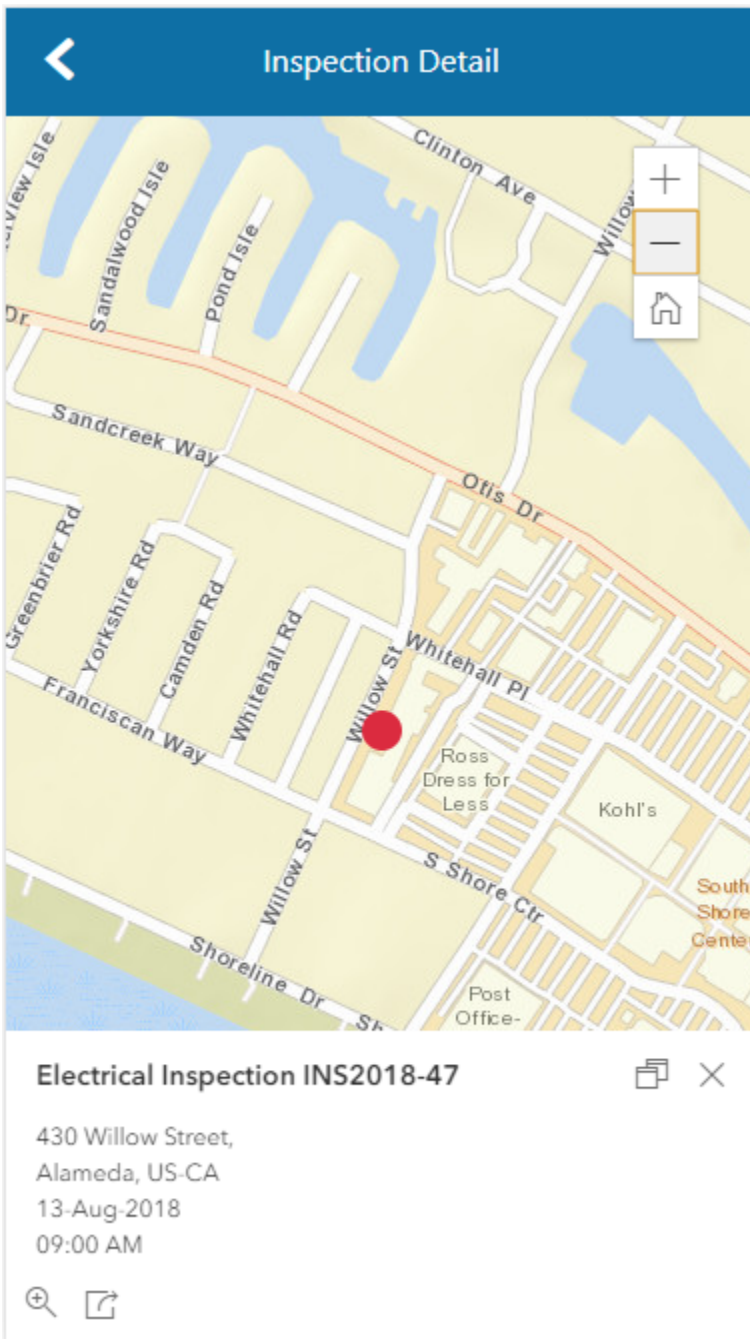
In addition to an interactive map, the map view includes the inspection name, inspection number, property address, and scheduled date and time of the inspection.

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Using Inspection Checklists

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

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

- Access checklist items.

- Provide a result for the checklist.

- Review or add checklist attachments.

- Review or add checklist comments.

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

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Inspection Checklist — Save

Plumbing Inspection
INS2018-20

Kitchen Checklist

Result No Result
Total Score

0%

0 / 2

^

💬 Comments >

📎 Attachments >

Page Elements	Description
Checklist	Click the checklist row to open the Checklist Items page.
Result	Displays No Result, Pass, or Fail after calculating the entered checklist results, where No Result is the default value if the checklist results have not been added.

Page Elements	Description
	Results are defined by the agency. Common results are Pass, Fail, Corrected on Site, Not Applicable, and Not Observed. If the inspection was set up by the agency to use scoring, the system automatically populates the result based on the scoring method. If scoring is not used, the inspector must manually add the result.
Progress indicator	Displays percentage in a progress ring and count how many of the checklist items have been evaluated.
Comments	Click to open the Comments page for the checklist level. Review or add comments related to the checklist.
Attachments	Click to open the Attachments page. Review or upload attachments related to the checklist, such as videos or annotated photos.

Working with Checklist Items

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

- View a list of checklist items.

- Enter a result for each checklist item.

- Click a checklist item to access the Checklist Item Results page.

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

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| < | Checklist Items | Save |

Kitchen Checklist
Result No Result

Edit

▲ Kitchen

  ▲ Plumbing

1.   * Dishwashing machines shall be connected to the drainage system with an approved air gap on the discharge side of the dishwashing machine.   >

  Result No Result
  Score

| Pass | Fail |

2.   * Kitchen faucets with flexible water connections shall have an anti-siphon device.   >

  Result No Result
  Score

| Pass | Fail |

You can use the **Edit** button to select multiple checklist items and assign the same result to them. When you choose a failing result, the Inspection Result Items page opens so that you can add comments and attachments as support documents for the failing result.

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

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On the Checklist Item Result page, you can:

- Review or add checklist attachments.

- Review or add checklist comments.

- Scroll through the item results.

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

Submitting Inspection Results

On the Inspection Result page, you can:

- Sign off on the inspection.

- Capture the contractor and property owner signatures.

- Add inspection comments and attachments as support documents.

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

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

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

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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.

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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

Permit 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 a permit belonging to one customer profile at a time. When the permit applicant changes their profile, the payment cart is updated to show the fees for the selected profile.

✏️ **Note:** The payment cart is available only to permit applicants. Agency staff can process payments from the agency's Permits page as well as from the Fees and Payments page in the permit details component.

Viewing Fees in the Payment Cart

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

Permit applicants can access a fee summary in the Payment Cart summary page by the payment cart icon:

This example illustrates the Payment Cart summary page, which is a dialog box with list of fees for each permit in the cart. The registered user can access the cart from this page.

If the cart is empty, the summary of fees is not available. The user can open the Cart page by clicking the **View Cart** button on the Payment Cart summary page and also by clicking the cart icon in the global header.

Paying Fees in the Payment Cart

The permit system applies fees to the user's account when they submit a permit application. The applicant can then move fees into the payment cart, where they remain until the applicant selects the fees for payment. Adjusted fees are updated automatically in the cart before checkout processing.

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

The Cart page includes these elements:

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Page Elements	Usage
	Click to group the fees by Address or Record Type.
	Click to sort the fees by Date Added, Record Type, or Permit.
Total Amount	Review the number of items to pay now and the total amount selected for payment.
Permit type link	Click the permit type link—for example, FRecord0402A—to open the permit Overview page and permit details.
Fee amount	View the fee amount for the record, 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 permit.
	The Fee Amount Changed alert indicates the fee has been adjusted. Adjusted fees are updated automatically in the cart before checkout processing.
Aging information	View the aging information for the fee, for example: Added 5 days ago.
Permit	View the permit number associated with the fee.
Property address	View the location of the property to which the fee applies.

Conditions that have been applied to the record or permit appear as icons next to the permit ID. For more information about conditions, see *Applying Conditions to Permit* and Implementing Oracle Public Sector Permits, "Setting Up Conditions."

After reviewing fees, the permit 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 permit application. The user can make changes to the permit if needed and add the fees to the cart later.

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Page Element	Usage
Return to Permit List	Click the link to return to the user's My Permits page.

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

Users cannot make any changes to the permits 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 My Permits page. If the payment fails, the fees remain in the cart and can be updated or resubmitted for payment.

Working with Cashier Sessions

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

Opening a Cashier Session

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

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

4. Click **Save**.

Modifying a Cashier Session

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

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

3. On the Cashier Session Details page you can:

   - Suspend an open cashier session by setting the **Status** to Suspended.

   - Reopen a suspended 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**.

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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 fee items or accounting transactions are processed by the Generate Accounting process when they have a status of Created. Once they have been processed, their status becomes Generated.

Viewing Accounting Transactions

1. Select **Accounting** > **Accounting Transactions** .
2. Select an accounting transaction on the Accounting Transactions page to view additional information about the transaction including any journal entries associated with it.

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:

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Page Element	Description
	○ 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. ✏️ **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.

Page Element	Description
By date	Select this option to run the process on specific dates of the month. You can select more than one date. ✏️ **Note:** This option and its associated fields are available only if you select a process frequency of Monthly or Yearly.
Month	Select the months in which you want your process to run. ✏️ **Note:** This option and its associated fields are available only if you select a process frequency of Yearly.

Setting Up Process Notifications

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

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

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

   - 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.

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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** .

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.
- 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** .
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** .
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.

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
All Open Periods	Select to run the process for all open accounting periods.
Specify Dates	Select to run the process for a specific date range.
Accounting Date From and **Accounting Date To**	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ○ 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.

Page Element	Description
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.
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.

8 Using Accessibility Features

Overview of Accessibility

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

The Public Sector Compliance and Regulation services are developed with the latest industry standards for accessibility in mind, which is in keeping with the overall development approach within Oracle.

Oracle recognizes the need for our applications, and our customers' and partners' products built with our tools, to be usable by the disabled community. The Oracle Accessibility Program Office, reporting to the office of the Chief Corporate Architect, is responsible for defining the corporate standards for accessibility, and developing materials to train all employees so that they can successfully create products that meet those standards.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at *http://www.oracle.com/us/corporate/accessibility/index.html*.

Oracle uses the Voluntary Product Accessibility Template (VPAT) to represent the degree of conformance to various accessibility standards and guidelines, including Section 508 (as released in 2001), WCAG 1.0, and WCAG 2.0. Depending on when a product was developed and released, different standards may be listed. Oracle is an active member on the ITI group that is working to enhance the VPAT to address future standards.

For more information about Oracle's published VPAT documents, see the Product Status (VPATs) page at *http://www.oracle.com/us/corporate/accessibility/vpats/index.html*.

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

Keyboard Shortcut	Description
<TAB>	This is the primary key used by all keyboard users to move from each control that can accept focus. • Use <TAB> to select any actionable or field just like you can use the mouse to select any field on the page. • For folder tabs, the <TAB> key will take you to a tab, and then you have to use other keys to select and navigate within that tab. • For radio buttons the <TAB> key will take you to the first radio button in a radio button set, and then you have to use other keys to select items within the radio button set. • For drop-down lists, the <TAB> key will take you to the list field, and then you have to use other keys to move through values and select values.
<SHIFT>+<TAB>	This keyboard combination works the same as <TAB>, except it works in the opposite direction. For example, it enables you to switch focus to the previous control or field, rather than the next control or field.

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Keyboard Shortcut	Description
<SPACEBAR>	Use for: • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
<ENTER>	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
<DOWN ARROW>	Use for: • Moving through values in a drop-down list • Selecting different values in a set of radio buttons • Moving between different folder tabs
<UP ARROW>	Works the same as the <DOWN ARROW>, except it enables you to move in the opposite direction (previous instead of next).
<LEFT ARROW>	Works similar to the <UP ARROW>.
<RIGHT ARROW>	Works similar to the <DOWN ARROW>.
<HOME>	When in the context of tabs, sets focus to the first tab.
<CTRL>+<HOME>	Takes you to the very top of a page.

Using the Keyboard with Data Collections

This topic describes examples of how to use keyboard shortcuts to navigate within the various collections, such as tables and lists, and select actionable items.

Tables

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

Country

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

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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.

Target	Key	Description
	Shift + Down Arrow	Select and move focus to the next row.
	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.
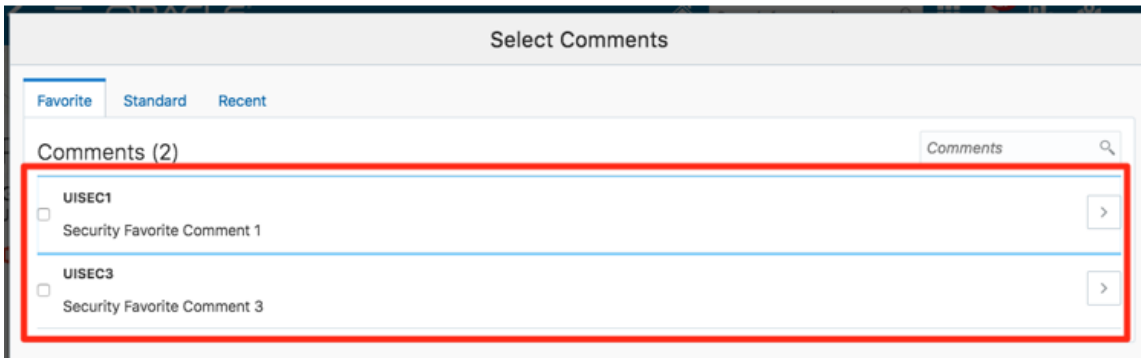
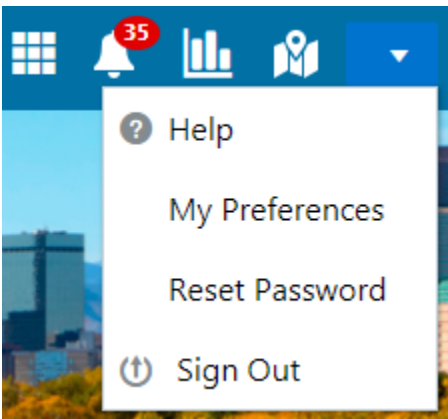| Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the 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.

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Target	Key	Description
	Enter	Selects the current item. No op if the item is already selected.

Using the Keyboard to Work with Page Controls

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

Buttons

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

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

Calendar

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

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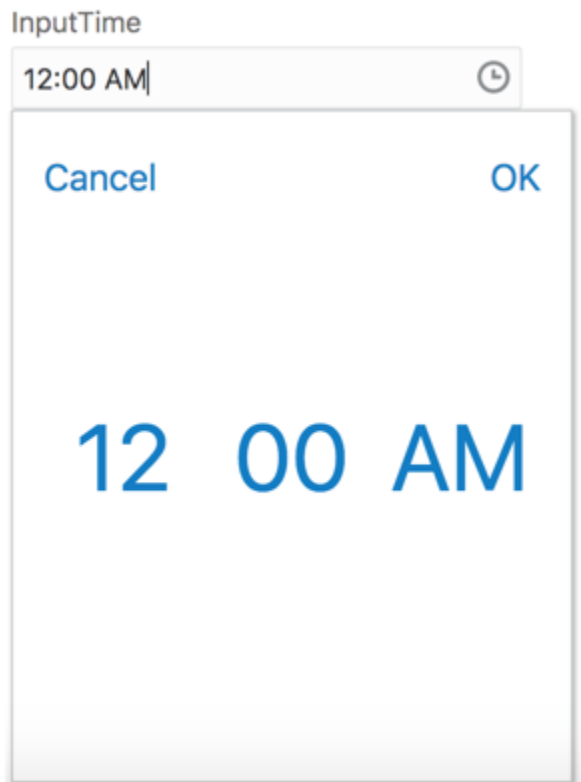| Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calender grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused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

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InputTime

12:00 AM

Cancel   OK

12   00   AM

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.

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

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

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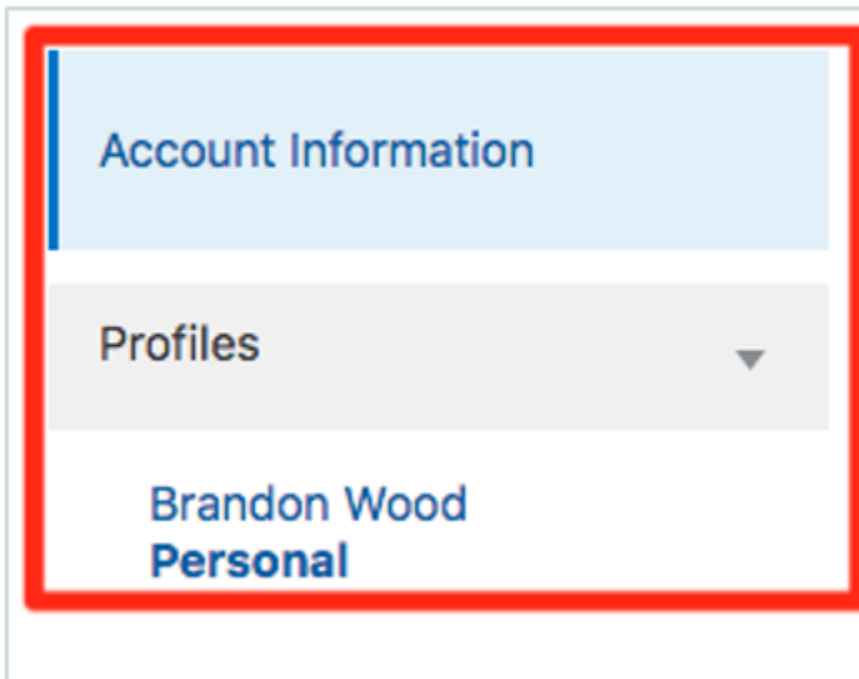
The following table lists the keyboard options used for accessing list items.

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

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Key	Description
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift + Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

Tab Bars

This section describes how to use the keyboard to work with tab bars.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl + X	Marks the current item to move if reorderable is enabled.
Ctrl + V	Paste the item that are marked to directly before the current item

Key	Description
DELETE	Delete the current item.