



# Oracle Public Sector Compliance and Regulation Cloud

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**Using Community Development  
Permits**

**21A**



# Contents

<b>Preface</b>	<b>i</b>
<hr/>	
<b>1 Managing Public Users</b>	<b>1</b>
Overview of Public User Accounts and Profiles	1
The Public User Registration Process	3
Accessing Public User Account Information	7
Adding Profiles to a Public User Account	9
Managing Public User Accounts	12
Verifying Public User Information	24
Managing Account and Profile Conditions	26
Overview of Public Landing Pages	31
<b>2 Applying for a Permit</b>	<b>35</b>
Choosing an Application Type	35
Getting an Online Fee Estimate	39
Completing an Application	40
<b>3 Using the Agency Springboard and the Task List</b>	<b>45</b>
Using the Agency Springboard	45
Managing Tasks	48
<b>4 Managing Permits</b>	<b>51</b>
Managing Transactions	51
Copying an Application	57
Canceling an Application	58
Working with Permit Details	59
Viewing the Permit Summary	61
Withdrawing an Application	64
Working with Property Information	65
Viewing Permit Application Details	67

Using Workflow	69
Working With Contractors and Agents in Applications	77
Adding Contacts to Applications	78
Applying Conditions to Applications	81
Working with Attachments	84
Working with Comments	88
Working with Fees and Payments	89
Viewing Project Summaries	93
Working with Application Communications	94
Working with Ad Hoc Communications	98
Viewing Application Status History	103
Working with Related Transactions	104
<b>5 Working with Expiration</b>	<b>105</b>
Expiration Overview	105
Working with Application Expiration	107
Updating Application Expiration Status	108
<b>6 Recording and Billing Time</b>	<b>113</b>
Adding Time Entries	113
Assessing Fees for Time Entries	115
<b>7 Managing Manual Plan Reviews</b>	<b>119</b>
Manual Plan Review Process Flow	119
Managing Manual Plan Review Cycles	119
Performing Manual Plan Reviews	123
<b>8 Managing Electronic Plan Reviews</b>	<b>127</b>
Electronic Plan Review Process Flow	127
Managing Electronic Plan Review Cycles	127
Performing Electronic Plan Reviews	133
<b>9 Working with Permit Inspections</b>	<b>137</b>
Managing Inspections for a Permit	137
Managing Inspections for an Agency	140

Requesting Inspections	143
Assigning Inspections Using the Supervisor Calendar	148
Viewing Assigned Inspections	154
Reviewing Inspection Details	155
Viewing Inspection Documents	157
Viewing Inspection Results	159
<b>10 Using Oracle Inspector</b>	<b>161</b>
Overview of Mobile Oracle Inspector for Permits	161
Installing and Configuring Oracle Inspector	161
Viewing Inspection Tasks	162
Working with Inspection Details	165
Viewing the Mobile Permit Summary	169
Working with Conditions	170
Reporting Inspection Time	172
Using Inspection Checklists	172
Submitting Inspection Results	177
Performing Offline Mobile Inspections	179
<b>11 Managing Projects</b>	<b>183</b>
Using Projects	183
Adding a New Project	184
Viewing and Updating Project Details	186
<b>12 Managing Property Information</b>	<b>195</b>
Working with Property Attachments	195
Applying Conditions to Parcels and Addresses	196
<b>13 Managing Contractor Information</b>	<b>201</b>
Contractor License Overview	201
Managing Contractor Licenses	203
<b>14 Working with Maps</b>	<b>209</b>
Overview of Delivered Maps	209
Using the Map Toolbar	212

Viewing Map Markers	213
Using the Main Map and Explore Your City Map	216
Creating Map-Based Public Notification Lists	222
<b>15 Working with Payments</b>	<b>225</b>
Payment Flow Overview	225
Payment Cart Overview	226
Working with Cashier Sessions	229
Reconciling Cashier Sessions	230
Printing Deposit Slips	232
Viewing Payment History	233
Viewing Invoice History	235
Viewing and Processing Refunds	236
Viewing Payments On Account	238
<b>16 Working with Accounting</b>	<b>241</b>
Viewing Accounting Transactions	241
Generating Journal Entries	241
Reviewing Journal Entries	244
Exporting Journal Entries	245
<b>17 Working with Processes</b>	<b>249</b>
Using the Process Monitor	249
<b>18 Using the Digital Assistant</b>	<b>251</b>
Overview of Digital Assistant	251
Asking Details	251
Asking Questions	251
<b>19 Using Accessibility Features</b>	<b>253</b>
Overview of Accessibility	253
Using General Keyboard Shortcuts	253
Using the Keyboard with Data Collections	254
Using the Keyboard to Work with Page Controls	258



# Preface

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

## Using Oracle Applications

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

### Conventions

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

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

### Additional Resources

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

## Documentation Accessibility

This topic covers accessibility concepts for this guide.

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

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

## Contacting Oracle

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

### Access to Oracle Support

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

### Comments and Suggestions

Please give us feedback about Oracle Public Sector Compliance and Regulation applications help and guides! You can send an e-mail to: [PSCR\\_US@oracle.com](mailto:PSCR_US@oracle.com).

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# 1 Managing Public Users

## Overview of Public User Accounts and Profiles

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

### Accounts Versus Profiles

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

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

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

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

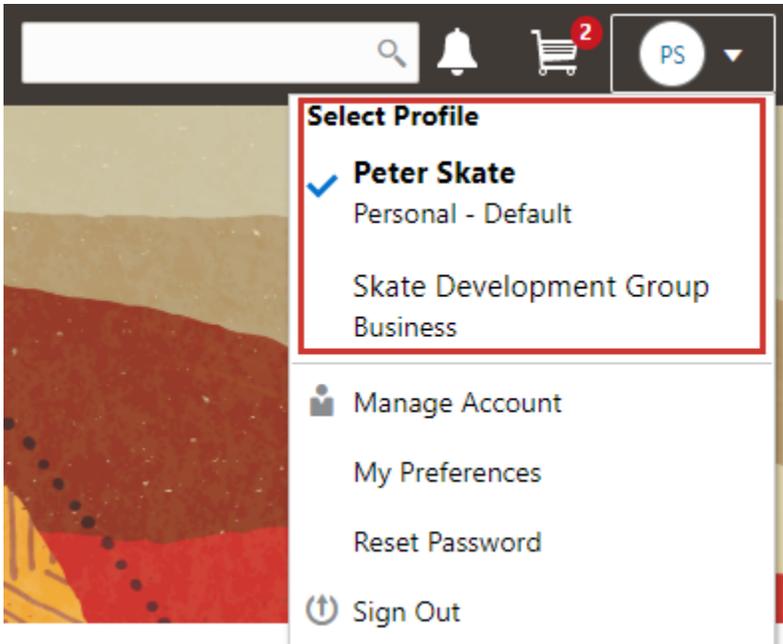
Updates to the address, phone, or email made during subsequent applications can be saved to the user's account profile.

### Profile Selection

When a user signs in, the user's default profile is the current profile.

The user's initials appear in the page header. Clicking the initials displays a menu of account-related options, including a Select Profile section that list all of the user's profiles. A check mark indicates the profile that's currently active. To switch to a different profile, the user simply clicks the other profile name.

This example illustrates the Select Profile option in the account menu.



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

## Account Data Versus Profile Data

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

- **Name:** the name of the person who owns the account.
- **Access:** the user name that is used for signing in, the email address that is used during the registration process, and the user's IVR code for accessing inspection schedules.
- **Additional Information:** whether the user's contact information is hidden from public view.

Your agency configures whether to give users this option..

- **Attachments:** documents that have been uploaded to the account.

Attachments can be associated with either an account or with a specific profile. The list of attachments for the account displays both account attachments and profile attachments. It identifies which profile, if any, the attachment is associated with.

- **Terms of Use:** the terms of use to which the user agreed.
- **Conditions:** restrictions that prevent certain actions or issue warnings when the actions are attempted.

Conditions can be associated with either an account or with a specific profile. The list of conditions for the account displays only the account-level conditions.

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

- **Profile Basics:** the profile name, type, active/inactive status, and whether it is the default profile for the account.

- **Profile Information:** the business name and business type for a business profile. This category isn't relevant to personal profiles.
- **Contact Information:** addresses, email addresses, and phone numbers.
- **Contacts:** people who might be added as contacts for application that are associated with this profile.

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

- **Licenses:** a list of licenses such as contractor licenses, the contractor status for the profile, and any related verification statuses.
- **Trust Accounts:** a list of payment accounts and any related verification statuses.
- **Attachments:** documents that have been uploaded to the account.

Attachments can be associated with either an account or with a specific profile. The list of attachments for a specific profile displays only that profile's attachments.

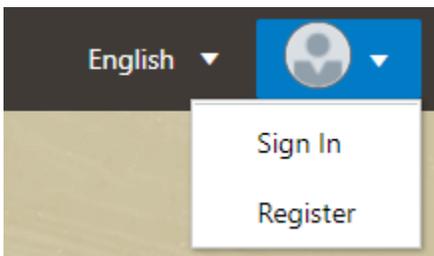
- **Conditions:** restrictions that prevent certain actions or issue warnings when the actions are attempted.

Conditions can be associated with either an account or with a specific profile. The list of conditions for a profile displays only the conditions that are specific to the profile.

## The Public User Registration Process

Although anonymous users can access information that is available to the general public, users must register before starting applications or performing most application-related activities.

When a public user is not signed in, the account menu on the anonymous user landing page includes options for registering and signing in.



Here is a summary of the registration process:

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

To sign in again in the future, the public user clicks the account icon in the landing page header and then clicks the **Sign In** menu item.

**Note:** Agency staff members who complete an application on behalf of a member of the public user can submit registration information for the public user. A confirmation email is sent to the account email address, and the public user must still complete the registration process by clicking the provided link and setting an account password. Staff members don't accept terms of use on behalf of users that they register. Instead, users are prompted to accept the terms when they first sign in.

This example illustrates the Register page.

## Register

\* Account Use  Personal  Business

Are You a Contractor?   [Add License](#)

? Mask My Contact Information    
from Public View

Salutation

\* First Name

\* Last Name

\* Business Name

\* Email Address

\* User Name

Country US

Postal Code

[Don't know](#)

? \* IVR Access Code

Phone  1   Ext.

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

[Register](#)

## Entering Registration Information

Users enter the following registration information.

Page Element	Description
Account Use	Indicates whether this is a personal account or a business account.

Page Element	Description
	<p>Accounts can have both personal and business profiles. The registration process creates a single profile, and additional profiles must be added later. The <b>Account Use</b> setting determines whether the default profile that is created during registration is a personal or business profile.</p> <p>For more information about profiles, see <i>Overview of Public User Accounts and Profiles</i>.</p>
<b>Are You a Contractor?</b>	<p>Indicates whether the account holder is a contractor. This switch is visible only if the user selects <b>Business</b> as the account use. The user's contractor status is associated with the business profile that is created during the registration process.</p> <p>License information is required when a user self-identifies as a contractor. When this switch is set to the on position, the user must click the adjacent <b>Add License</b> button to provide license details.</p>
<b>Add License</b>	<p>Used to provide details of a trade license held by a business. This button is visible only if the user selects <b>Business</b> as the account use. License information is required if the user self-identifies as a contractor. License information is optional for other businesses.</p> <p>Clicking this button opens the Contractor License Details page, which includes these fields: <b>License Type, License Number, Issued On, and Expiration Date</b>.</p> <p>After the user saves license information, the <b>Add License</b> button changes to an <b>Edit License</b> button.</p> <p>During registration, the user can enter information for only one trade license. After registering, the user can add additional licenses from the Manage Account page. See <i>Managing Public User Accounts</i>.</p> <p><b>Note:</b> Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.</p>
<b>Mask My Contact Information from Public View</b>	<p>Gives the user the option to mask their name and contact information when a member of the public views the user's applications.</p> <p>This question appears only if it is enabled on the Public User Setup page.</p> <p>The default answer to this question is <i>No</i>.</p> <p>Users can access help for this question by clicking the question mark icon adjacent to the question. The help explains that even when the user's own information is masked, the property addresses for all applications are visible to the public.</p>
<b>Salutation</b>	<p>A title such as <i>Ms.</i> or <i>Mr.</i> that is used to address the person.</p> <p>This field is optional.</p>
<b>First Name and Last Name</b>	<p>The user's name, which is the same across all of the user's profiles.</p>
<b>Business Name</b>	<p>This field is visible only if the <b>Account Use</b> field indicates that this is a business account. The business name entered here is associated with the business profile that the registration process creates. If additional business profiles are added later, they have their own business names.</p>

Page Element	Description
<b>Email Address</b>	<p>The user's email address. After the user submits registration information, the system sends an email to this address. The email contains a link that the user needs in order to complete the registration process.</p> <p>This email address is also associated with the default profile that the registration process creates. If the user registers as a business, the email type is <i>Work</i>. If the user registers a personal account, the email type is blank.</p> <p>If a user attempts to register with an email address that is already associated with an account, an error message appears. The message says to use the Sign In page to access the existing account or to recover a forgotten user name or password.</p>
<b>User Name</b>	<p>The user name that the public user will use to sign in to the system. User names must be unique, and the system displays an error message if the user tries to create an account under a user name that already exists.</p> <p>Note that the user does not select a password at this point. Password creation occurs after the user submits registration information.</p>
<b>Address Fields</b>	<p>The user's address. This address is automatically added to the default profile that is created when the user creates an account.</p> <p>The <b>Country</b> field displays <i>US</i>.</p> <p>As the user enters a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After the user selects a value, the city and state appear as read-only fields, and two address fields appear so that the user can enter the rest of the address.</p> <p>A user who doesn't know the postal code can click the <b>Don't know</b> link to display a full set of address fields.</p>
<b>IVR Access Code</b> (Interactive Voice Response Code)	<p>A 4-digit code that enables the public user to access and change the schedule for permit inspections using interactive voice response. When users dial in, they are asked to enter their code before accessing the inspection records.</p> <p>The code is masked on this page, and users will not be able to see this code again even after registration is complete. Users who forget their code must enter a new code. For information about entering a new code after registering, see <a href="#">Managing Public User Accounts</a>.</p> <p>This field appears only if you enable IVR access codes on the Public User Setup page.</p>
<b>Phone</b>	<p>A phone number for the account holder. This field is optional.</p>

## Agreeing to Terms and Conditions

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

If 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 must select the check box to continue. A user who does not want to accept the terms can cancel.

After the user accepts the terms and continues, the main Register page displays a selected agreement check box instead of instructions. The check box is not editable. The link to the detail window is still available, and the user can return to the window to re-read the terms or rescind agreement.

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

## Completing Registration by Resetting the Password

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

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

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

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

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

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

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

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

## Accessing Public User Account Information

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

## Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

1. Select **Public User > Public User Access**.

The Public User Access page displays summary information about public user accounts. The list includes information such as the person's name, user name, email address, and the number of pending verification requests.

An icon before the user's name indicates that the account or a profile is subject to one or more conditions. Conditions relate to permits and to planning applications. They prevent certain actions or issue warnings when the actions are attempted. To see condition details, access the detail page for the user account. For more information, see *Managing Account and Profile Conditions*.

2. Search for the desired user account.
3. Click the > icon for the row with the desired user account.

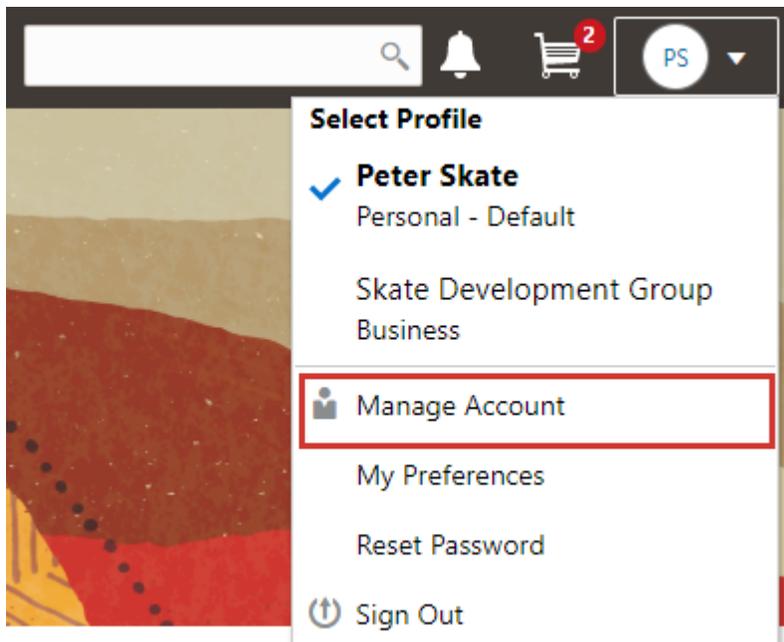
## Account Management Navigation for Registered Public Users

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

1. Sign in to access the public user landing page.
2. Click the account menu that appears in the page header.

A drop-down menu appears.

This example illustrates the account menu under the user's initials.



3. Select **Manage Account**.

## Adding Profiles to a Public User Account

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

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

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

### Manage Account

The screenshot shows the 'Manage Account' interface. On the left, there is a sidebar with a 'Profiles' dropdown menu. The main content area is titled 'Profile-Joe Smith' and includes two buttons: 'Clone Profile' and 'Create New Profile'. Below the title, there are four sections: 'Profile Basics' (Personal, Default), 'Contact Information' (Added: 2), 'Contacts' (Added: none), and 'Licenses' (Added: none, Contractor: No).

## 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
<b>Profile Name</b>	Enter a descriptive name. This is the name that appears in the page header when this profile is in use.
<b>Profile Type</b>	If the account does not already have a personal profile, select either <i>Personal</i> or <i>Business</i> .  If a personal profile already exists, the profile type is <i>Business</i> and the field is read-only.
<b>Business Name</b>	If the profile type is <i>Business</i> , enter the business name. This field is not visible for personal profiles.
<b>Status</b>	Select <i>Active</i> or <i>Inactive</i> . A profile must be active to be the default profile or for a user to switch to the profile.

Page Element	Description
	Inactive profiles are not editable. To add any information other than the basic information on the Create New Profile page, you need to make the profile active.

5. Click **Create**.

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

## Cloning a Profile

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

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

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

To clone a profile:

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

Page Element	Description
<b>Clone From</b>	This read-only field displays the name of the profile that you're cloning.
<b>New Profile</b>	Enter a descriptive name for the new profile. This name appears on the landing page banner when this profile is selected.
<b>Profile Type</b>	If the account does not already have a personal profile, select either <i>Personal</i> or <i>Business</i> .  If a personal profile already exists, the profile type is <i>Business</i> and the field is read-only.
<b>Business Name</b>	If the profile type is <i>Business</i> , 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
<b>Contact Details</b>	<p>Select this check box to automatically select the check boxes for all three specific contact methods: <b>Address, Phone, and Email</b>.</p> <p>Deselect this check box to clear the check boxes for all three specific contact methods.</p> <p>You can also select and deselect the individual check boxes for each contact method.</p>
<b>Contacts</b>	Select this check box to copy contacts into the new profile.
<b>Licenses</b>	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.
<b>Trust Accounts</b>	Select this check box to copy trust account information into the new profile. Verification statuses are also copied to the new profile, so agency staff does not have to re-verify the information.

6. Click **Create**.

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

## Setting the Default Profile

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

To designate a profile as the default profile:

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

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

5. Click **Save**.

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

## Managing Public User Accounts

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

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

### Public User Access Versus Agency Staff Access

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

- Public users can see the verification status for any data that requires agency verification, but only agency staff can update the verification status.
- If account attachments are enabled, public users can't delete attachments unless you configure the Public User Setup page to allow this action. Agency staff can always delete attachments.
- Only agency staff can apply and manage account and profile conditions. Conditions are account restrictions. Both public users and agency staff can see active conditions that have been applied to the account or to profiles.

For more information about conditions, see [Managing Account and Profile Conditions](#).

**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.  
If the account has active conditions, the left frame displays a warning icon next to the Account link. Similarly, if any profiles have active conditions, an icon appear next to the profile name. Conditions relate to permits and planning applications. Active conditions can prevent certain actions or issue warnings when the actions are attempted. For detailed information about managing conditions, see [Managing Account and Profile Conditions](#).
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 information:

Page Element	Description
<b>User Name</b>	The user’s first and last name. This field is read-only.
<b>Email</b>	The email that was provided during registration. This field is read-only.  This email is used for account access notifications such as those related to setting passwords and changing or verifying account or profile information.
<b>IVR Access Code</b> (Interactive Voice Response Code)	This field appears only if you enable IVR access codes on the Public User Setup page.  This field is for the 4 digit code that enables the public user to access and change the schedule for permit inspections using interactive voice response. When users dial in, they are asked to enter their 4 digit code before accessing the inspection records.  The code is masked on this page. To change the code, click the <b>Edit</b> icon. The field is cleared so you can’t see the original code, and OK and Cancel icons appear next to the now-editable field.  You can click the cancel icon to return to the original code, or you can enter a new code and click the check mark to save the new value.

- c. Click **Cancel** to close the page.
5. To view or update additional information:
- a. Click the **Additional Information** item in the right frame.  
The Additional Information page appears.
  - b. Review or update the setting for the **Mask My Contact Information from Public View** check box.
  - c. Click **Save** to save any changes and close the page.
6. To review the most recently accepted terms of use:

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

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

When a public user views this information, the terms are always current as of the time the user signed into the current session. This is because users must agree to any changes in the terms of use when signing in.

When agency staff views this information, they see the terms that the user last accepted, even if the agency has changed the terms since then.

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

- 7. To view conditions that have been applied to the account:

- a. Click the **Conditions** item in the right frame.

A window that lists account-level conditions appears. Active conditions are first, followed by resolved conditions.

- b. Review the conditions, and optionally access condition details or resolve conditions.

For detailed information about adding and managing conditions, see [Managing Account and Profile Conditions](#).

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

## Managing Account Attachments

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

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

To manage account attachments:

- 1. Access the Manage Account page.

This page has two frames. Use the left frame to select either the overall account or a specific profile. Use the right frame to view and update details for the selected item.

- 2. Select **Account Information** in the left frame.

This is selected by default when you first access the Manage Account page. When it is selected, the right frame list the different types of account information, including attachments. The row for attachments includes information stating how many attachments (if any) have been added. Both account attachments and profile-specific attachments are included in the count.

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

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

Page Element	Description
File Name / Date	The file name of the attachment, and the date that the attachment was added to the account.

Page Element	Description
<b>Description</b>	A user-supplied description. Users can optionally add a description while adding the attachment.
<b>Profile Name</b>	If the attachment is associated with a specific profile, the profile name appears. If the attachment is associated with the account in general (and not with a specific profile), this column is blank.
<b>Category</b>	This column appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories.  When visible, this field displays the document category for the attachment.  For more information, see <a href="#">Setting Up Document Categories and Subcategories</a> and <a href="#">Setting Up Document Groups</a> .
<b>Subcategory</b>	This column appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a <i>Licenses</i> category might have subcategories for different types of contractor's licenses.  When visible, this field displays the document subcategory for the attachment.
<b>Actions</b>	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.

4. To add a new attachment:

- a. Click **Add**.
- b. Select a file using your browser's file selection window.
- c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
- d. If document groups are enabled for public users, optionally select the appropriate **Category** and **Subcategory** values.
- e. Click **Upload**.

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

5. To view or modify attachment information:

- a. Click the **Actions** icon and select **View Details**.
- b. On the Attachment page, review the **File Name**, the **File Size**, and the **Last Updated By** and **Uploaded By** user names.
- c. Optionally update the **Description**.
- d. If document groups are enabled for public users, optionally update the **Category** and **Subcategory**.
- e. To change which profile, if any, is associated with the attachment, use the **Profile Name** field.

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

- f. Click **Save** or **Cancel** to return to the Attachments page.
- 6. To download a file, click the **Actions** icon and select **Download**.
- 7. To delete a file, click the **Actions** icon and select **Delete**.

You are prompted to confirm the deletion.

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

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

## Viewing a Profile Summary

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

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

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

To view the summary information for a profile:

1. Access the Manage Account page.
2. Select a profile in the left frame.  
If no profiles are visible, click the **Profiles** header to expand the list of profiles.
3. Review the following summary information:

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

Profile Section	Information Displayed
Trust Accounts	The number of trust accounts for the profile.
Conditions	<p>The number of active conditions for the profile.</p> <p>Although the details for this section includes both active and resolved conditions, the count in the summary includes only active conditions.</p>

## 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
<b>Profile Name</b>	<p>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.</p> <p>The default name for the profile that is created during the registration process is the public user's first and last name. This default name is truncated if it is longer than 60 characters.</p>
<b>Default</b>	<p>Select this check box to designate the profile as the default profile for the account.</p> <p>The default profile is the one that's used when the public user signs into the system. The profile that gets created during the registration process is the default profile until you add additional profiles and change the default.</p> <p>Only one profile can be the default, so when you select this check box for one profile, the check box is automatically deselected for the previous default.</p> <p>The check box is read-only for the current default profile. This prevents you from deselecting it and creating a situation where there is no default profile.</p>
<b>Profile Type</b>	Displays either <i>Personal</i> or <i>Business</i> . You cannot change the profile type.
<b>Status</b>	Profiles can be <i>Active</i> or <i>Inactive</i> . Only active profiles appear in the Select Profile menu for switching profiles.

Page Element	Description
	Inactive profiles are not editable. To make a profile active after you create it, edit the profile basics using account management functionality. See <i>Managing Public User Accounts</i> .

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

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

## Managing Contact Information

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

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

To update contact information:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Contact Information** section to open the Contact Information page.
4. To add or modify a contact method:
  - a. If you are adding a contact method, click **Add** in the appropriate section (Address, Phone, or Email) to open the Details page.
  - b. If you are updating a contact method, click the **>** icon at the end of an existing row to open the Details page.
  - c. Select the **Type**.  
The Details page displays different fields depending on the type of contact method, but all contact methods include the **Type** field. Address types are *Home* and *Work*. Email and Phone types are *Home* and *Business*.
  - d. If you're adding a new address, either enter the **Postal Code** or click the **Don't know** link.

As you enter a **Postal Code**, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address. If you don't know the postal code, clicking the **Don't know** link displays a full set of address fields.

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

- e. Enter the complete contact information: either an address, a **Phone** and **Ext** (extension), or an **Email**.
  - f. If this will be the primary address, phone number, or email, select the **Primary** check box.  
Only one contact method of each type can be primary, so if you select the check box, the previous primary address, phone number, or email (if any) is updated to no longer be primary.
  - g. Click **Save** or **Cancel** to close the Details page and return to the Contact Information page.
5. To delete a contact method, click **Delete** for the appropriate row.
  6. Click **Cancel** to return to the Manage Account page.

## Managing Contacts

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

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

To manage contacts:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Contacts** section to open the Contacts page.
4. To copy existing contacts from other profiles in this account:
  - a. Click **Copy from Other Profiles**.  
The Select Contact List page appears. It lists all contacts that are associated with other profiles for this account. A contact who is already associated with multiple profile appears in the list multiple times.  
The contact list displays the contact's name, business name, address, email, and phone number.
  - b. Select one or more contacts to be copied.
  - c. Click **Select**.  
The Select Contact List page closes. The selected profile(s) now appear on the Contacts page.
5. To add a new contact or modify an existing contact:
  - a. If you are adding a contact, click **Add** to open the Contact Details page.
  - b. If you are updating a contact, click the > icon at the end of the row to open the Contact Details page.
  - c. On the Contact Details page, enter the contact's **First Name**, **Middle Name**, **Last Name**, and **Business**.
  - d. To enter an address, enter the **ZIP Code** or click the **don't know** link to reveal additional address fields, then enter information in those address fields.
  - e. Enter a **Phone** and **Ext** (extension).
  - f. Enter an **Email**.
  - g. Click **Save** or **Cancel** to close the Contact Details page .

Any information you save immediately appears on the Contacts page.

- h. Click **Cancel** on the Contact page to return to the Manage Account page.

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

## Updating Licenses

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

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

To update license information:

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

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

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

Page Element	Description
<b>License Type</b>	This is a free text field for entering the type of license, such as a General Contractor license or an Electrical Contractor License.
<b>License ID</b>	Enter the license number that uniquely identifies the license.
<b>Start Date</b>	Enter the date that the license became valid.
<b>Expire Date</b>	Enter the date that the license expires or requires renewal.
<b>Verification Status</b>	<p>This field is visible if the Public User Setup page is configured to require that licenses be verified.</p> <p>The default value for a new license is <i>Pending verification</i>.</p> <p>Agency staff updates the status to either <i>Verified</i> or <i>Verification failed</i> after independently verifying the license.</p> <p><b>Note:</b> Although public users and agency staff can both see the verification status, only agency staff can update the value.</p>

7. Click **Save** or **Cancel** to return to the Licenses page.
8. Click **Save** or **Cancel** to return to the Manage Account page.

Saving on the Licenses page saves changes to the **Are you a Contractor** and **Verification Status** fields. Changes to licenses are saved from the License Details page.

## Updating Trust Accounts

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

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

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Trust Accounts** section to open the Trust Accounts page.
4. To add a new trust account, click **Add**, or to view an existing trust account, click the row for the account you want to view.

The Trust Account Details page opens.

5. Review and update the following fields on the Trust Account Details page:

Page Element	Description
<b>Account Number</b>	Enter the unique account number for the trust account.
<b>Description</b>	The description might include the financial institution name and other important information about the account.
<b>Status</b>	Select <i>Active</i> or <i>Inactive</i> .
<b>Verification Status</b>	<p>This field is visible if the Public User Setup page is configured to require that accounts be verified.</p> <p>The default value for a new account is <i>Pending verification</i>.</p> <p>Agency staff updates the status to either <i>Verified</i> or <i>Verification failed</i> after independently verifying the account information that the user provided.</p> <p><b>Note:</b> Although public users and agency staff can both see the verification status, only agency staff can update the value.</p>

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

## Managing Profile-Specific Attachments

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

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

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

To manage profile-specific attachments:

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

The Attachments window opens. It lists the attachments that are associated with the profile.

Page Element	Description
<b>File Name / Date</b>	The file name of the attachment, and the date that the attachment was added to the account.
<b>Description</b>	A user-supplied description. Users can optionally add a description while adding the attachment.
<b>Category</b>	<p>This field appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories.</p> <p>When visible, this field displays the document category for the attachment.</p> <p>For more information, see <a href="#">Setting Up Document Categories and Subcategories</a> and <a href="#">Setting Up Document Groups</a>.</p>
<b>Subcategory</b>	<p>This field appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a <i>Licenses</i> category might have subcategories for different types of contractor's licenses.</p> <p>When visible, this field displays the document subcategory for the attachment.</p>
<b>Actions</b>	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.

4. To add a new attachment:

- a. Click **Add**.
- b. Select a file using your browser's file selection window.
- c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
- d. If document groups are enabled for public users, optionally select the appropriate **Category** and **Subcategory** values.
- e. Click **Upload**.

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

5. To view or modify attachment information:

- a. Click the **Actions** icon and select **View Details**.
- b. On the Attachment Details page, review the **File Name**, the **File Size**, and the **Last Updated By** and **Uploaded By** user names.
- c. Optionally update the **Description**.
- d. If document groups are enabled for public users, optionally update the **Category** and **Subcategory**.
- e. Click **Save** or **Cancel** to return to the Attachments page.

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

You are prompted to confirm the deletion.

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

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

## Managing Profile-Level Conditions

This procedure describes how to access profile-level conditions from the profile summary page. For detailed information about adding and managing conditions, see [Managing Account and Profile Conditions](#).

To manage profile-level conditions:

1. Access the Manage Account page.

This page has two frames. Use the left frame to select either the overall account or a specific profile. Use the right frame to view and update details for the selected item.

2. In the left frame of the page, select a profile that has conditions.

If a profile has conditions, an icon representing the condition severity appears next to the profile name.

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

A window that lists the conditions for the selected profile appears. Active conditions are first, followed by resolved conditions.

4. Review the conditions, and optionally access condition details or resolve conditions.
5. Click the **x** in the top right corner of the window to close it.

## Verifying Public User Information

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

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

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

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

Alternatively, the Public User Access 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 User Access page.

Public User Access

+ - Search

Name	User Name	Email	Active	Pending Verification Requests
Jim Taylor	Jtaylor	FINARUser1@ap6023fems.us.oracle.com	Yes	3
Rita Johnson	Rjohnson	FINARUser1@ap6023fems.us.oracle.com	Yes	2
William Harrison Brown	Wbrown	FINARUser1@ap6023fems.us.oracle.com	Yes	1

This example illustrates the Pending Verification Requests page.

Pending Verification Requests

Rita Johnson ( [redacted]@ [redacted] )

Download

Profile Name	Type	Verification Details	Verification Status
Rita Johnson	User is a contractor		Pending verification
Rita Johnson	User added or updated license	<b>License Number</b> 268-953-111 <b>License Type</b> Electrical <b>Issued On</b> 1/1/18 <b>Expiration Date</b> 1/1/20	Pending verification

Cancel Save

## Managing Verification Requests

To find and manage pending verification requests:

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

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

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

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

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

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

Page Element	Description
Profile Name	Displays the profile that is associated with the data to be verified.

Page Element	Description
<b>Type</b> (type of request)	Explains what type of information must be verified. Values include: <ul style="list-style-type: none"> <li>○ <i>User is a contractor</i></li> <li>○ <i>User added or updated license</i></li> <li>○ <i>User added or updated trust account</i></li> </ul>
<b>Verification Details</b>	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 .
<b>Verification Status</b>	Because this page lists only pending verification requests, all rows initially have the status <i>Pending Verification</i> .

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.

## Managing Account and Profile Conditions

Conditions can be applied to a public user's account or profile to limit the user's ability to submit applications or perform other activities. When the condition is marked as resolved, the restrictions are removed.

Agencies define the conditions that their staff can apply to public user accounts and profiles. Public users can see the conditions that have been applied to their account and profiles, but only agency staff can mark conditions as resolved.

A condition's business rules control which activities are limited by the condition. These business rules relate to permits and to planning applications. For information about these business rules, see [Setting Up Conditions](#).

A condition's severity determines how the condition affects activities. This table describes each severity level..

Severity	Icon	Description
Lock		The user is prevented from completing any of the activities that are affected by person conditions.
Hold		The agency user who applies the condition chooses which activities to prevent. Other

Severity	Icon	Description
		activities generate warning messages, but do not prevent the actions from being completed.
Notice		The user receives warning messages when attempting any of the activities that are affected by person conditions.

## Viewing Conditions and Condition Indicators

This example shows condition indicators on the Manage Account page.

### Manage Account

The screenshot shows the 'Manage Account' page for a user named 'Dooley Doodles Business'. A red notification icon indicates 4 active conditions. A table lists the conditions:

Condition Name	Severity	Applied Date	Display Message	Status	Priority	Resolved Date	Resolve
PersonCondition_Lock	Lock	2/17/20	Lock Condition	Applied	High		Resolve >
PersonCondition_Hold	Hold	2/17/20	Hold Condition	Applied	High		Resolve >
PersonCondition_Notice	Notice	2/17/20	Notice Condition	Applied	High		Resolve >

To view active conditions for a public user:

1. Select **Public User > Public User Access**.

The Public User Access page displays lists summary information about public user accounts. If an account (or any of the account's profiles) have active conditions, the icon for the most severe condition appears before the user's name.

2. Search for the desired user account and click the > icon to view account details.
3. At the top of the page (just below the page title), review the severity icon and the name for the account's most severe active condition, and see the total number of active conditions.
4. Click the *All Conditions <number of conditions>* link to open a window with additional details.

This example illustrates the window that lists all conditions for an account.

The 'Conditions' window displays a table with the following data:

Condition Name	Severity	Account or Profile	Display Message	Applied Date
Payment Overdue	Lock	Dooley Doodles	You have an overdue payment	2/19/20
PersonCondition_Notice	Notice	Account	Notice Condition	2/17/20

At the bottom of the window, there is a pagination control showing 'Page 1 of 1 (1-2 of 2 items)' and navigation arrows.

In addition to the condition name, severity, and applied date, the window includes the following information:

Page Element	Description
<b>Account or Profile</b>	<p>Displays <i>Account</i> if the condition was applied to the overall account. Account-level conditions are enforced for all of the account's profiles.</p> <p>Displays a profile name if the condition was applied to specific profiles.</p>
<b>Display Message</b>	Displays an agency-defined message with information about the condition.

5. Review any icons next to the Account or Profile names in the left frame.  
The icons indicate the highest level of severity of the active conditions for the account or profile.
6. (Agency staff only) Click the Conditions tab in the left frame.  
This tab is not visible to public users.
7. In the right frame, click the **Account** and **Profiles** links to toggle between a list of account-level conditions and profile-level conditions.  
These lists include resolved conditions as well as active conditions.  
The following procedures provide instructions for adding conditions, resolving conditions, and reviewing

## Adding Conditions

To add account and profile condition:

1. Access the Manage Account page.
2. Click **Conditions** in the left frame.
3. In the right frame, click either **Account** or **Profiles** depending on whether you want to add the condition to the overall account or to specific profiles.
4. Click **Apply Condition**.
5. If this condition applies to specific profiles:
  - a. Expand the **Select One or More Profiles** section.
  - b. Review the list of profiles, and select the **Apply Condition** check box for the profiles that will be subject to the condition.

**Note:** You can apply a condition to multiple profiles at once, but you will need to resolve the conditions for one profile at a time.
6. Enter the following condition information:

Page Element	Description
<b>Condition Name</b>	Select one of the conditions that the agency has defined.
<b>Severity</b>	Displays the severity of the selected condition:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Lock</i>: No actions can be taken until the condition is resolved.</li> <li>○ <i>Notice</i>: Actions are not prevented, but they trigger warning notices.</li> <li>○ <i>Hold</i>: Agency staff chooses one or more actions to lock down entirely. Other actions trigger warning notices without actually preventing actions.</li> </ul>
<b>Business Rules</b>	<p>Displays check boxes for indicating which actions are locked down. If a check box is not selected, the action is permitted, but it triggers a warning notice.</p> <p>The check boxes are selected and read-only if the severity is <i>Lock</i>. They are deselected and read-only if the severity is <i>Notice</i>.</p> <p>If the condition severity is <i>Hold</i>, the check boxes are initially deselected. You must select one or more check boxes for the actions that you want to prevent.</p> <p>The <b>Prevent New</b> check box is always visible because all conditions affect new applications.</p> <p>Check boxes for these business rules are visible only if the <b>Apply Conditions to Transactions</b> switch is enabled.</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Workflow Advancing</b>: Permit and planning application workflow tasks can't be completed.</li> <li>○ <b>Prevent Issue or Final</b>: The final step in permit or planning application workflow can't be completed.</li> <li>○ <b>Restrict Payment</b>: Payments for the permit or planning application can't be processed.</li> <li>○ <b>Prevent Inspection Schedule</b>: New inspections can't be scheduled. Existing inspections are not affected.</li> <li>○ <b>Prevent Inspection Result</b>: Inspection results can't be finalized.</li> </ul>
<b>Additional Information</b>	Enter any additional information or notes regarding the condition that you're applying.
<b>Display Message</b>	Displays an informational message that also appears in the list of all active conditions for an account.
<b>Priority</b>	Select <i>High</i> , <i>Medium</i> , or <i>Low</i> .
<b>Description</b>	The default description comes from the condition definition, but you can change this description as needed.

7. Use these fields to control the impact of the condition on transactions:

Page Element	Description
<b>Apply Condition to Transactions</b>	<p>Enable this switch to apply the condition to existing transactions. When you enable this switch, the complete set of business rule check boxes becomes visible in the <b>Business Rules</b> section of the page. If the severity is <i>Hold</i>, you can select which business rules to apply.</p> <p>If this switch is not enabled, the only relevant business rule (and the only visible business rule check box) is <b>Prevent New</b>.</p> <p>The default setting for this switch comes from the condition definition, but you can change the setting.</p>
<b>Include in-process transactions</b>	<p>This check box is visible only if the <b>Apply Condition to Transactions</b> switch is enabled. Select this check box to apply the condition to all active applications for this account or profile.</p>
<b>View Impacted Transactions</b>	<p>Click this link to open a window that lists the in-process applications that will be impacted if you select the <b>Include in-process transactions</b> check box.</p>

8. Click **Save**.

## Resolving a Person Condition

To resolve a person condition:

1. Access the Manage Account page.
2. Click **Conditions** in the left frame, then use the **Account** and **Profiles** links in the right frame to see lists of conditions.

In the profile list, you need to expand profile sections to see the conditions. The title of each profile section includes the number of active conditions as well as the profile name.

**Note:** You can also access condition lists by using the left frame to access the account or profile that has the condition, then clicking **Conditions** in the right frame.

3. Locate the condition to be resolved.

The condition lists include both active and resolved conditions. Active conditions appear at the beginning of the list and have a status of *Applied*.

4. Click the **Resolve** button.

The Resolve Condition window opens.

5. Enter a description of the resolution in the **Resolution Action** field.
6. Click **Save** to apply the resolution and close the window.

The resolved condition moves to the end of the condition list.

## Viewing or Updating Condition Details

1. Access the Manage Account page.
2. Click **Conditions** in the left frame, then use the **Account** and **Profiles** links in the right frame to see lists of conditions.

In the profile list, you need to expand profile sections to see the conditions. The title of each profile section includes the number of active conditions as well as the profile name.

**Note:** You can also access condition lists by using the left frame to access the account or profile that has the condition, then clicking **Conditions** in the right frame.

3. Review summary information for conditions.

Active conditions are listed before resolved conditions.

In addition to the condition name, the severity, and the display message, the following information appears:

Page Element	Description
<b>Applied Date</b>	The date that the condition was added to the account or profile.
<b>Status</b>	Indicates if the condition is <i>Active</i> or <i>Resolved</i> .
<b>Priority</b>	The agency-defined priority for the condition. The priority is part of the condition definition.
<b>Resolved Date</b>	If the condition has been resolved, indicates the date that it was resolved.

4. Click the **View More Details** icon to open the Condition Details page.

In addition to the fields that have already been described, this page also shows an **Applied By** field.

If the condition has been resolved, the page also displays the these additional fields: **Resolution Action**, **Resolved By**, and **Resolved Date**.

All fields are read-only except that if an active condition has a severity of *Hold*, the business rule check boxes are editable.

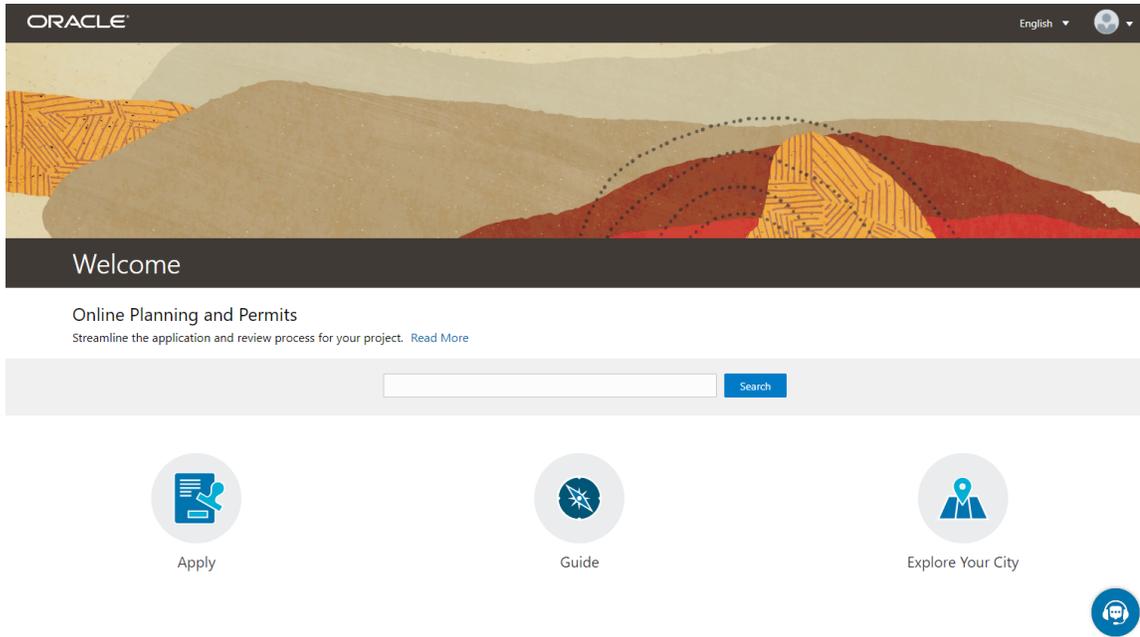
5. Click **Cancel** to return to the Conditions page.

## Overview of Public Landing Pages

The public landing pages give members of the public access to agency services. There are two separate public landing pages, one for anonymous users (guests), and one for registered users who have signed in.

Public user landing pages have many of the same elements as the agency springboard (a global header, tiles, and so forth), but the content of the page is tailored to a different audience. For information about the agency springboard, see [Using the Agency Springboard](#).

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



## Landing Page Configuration

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

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

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

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

## Tiles on the Anonymous User Landing Page

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

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

Page Element	Description
Apply	Provides access to a page where the user can choose an application type and then start an application.

Page Element	Description
<b>Guide</b>	<p>Provides access to a questionnaire. The user provides information about a project, and the guide uses that information to recommend application types.</p> <p>Your agency defines the guide questionnaire using Oracle Intelligent Advisor. If your agency is not using Oracle Intelligent Advisor, this tile will not appear.</p> <p>The questionnaire comes from the Oracle Intelligent Advisor policy model that you specify for the <i>Permits</i> offering, if one exists. If there's no offering-level policy, the questionnaire comes from the agency-level Oracle Intelligent Advisor policy model.</p> <p>For more information on identifying the Oracle Intelligent Advisor policy model to use, see <a href="#">Setting Up Agencies</a></p>
<b>Explore Your City</b>	<p>Provides access to a map where the anonymous user can search for and view property details, including applications related to the property.</p>

## Tiles on the Registered User Landing Page

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

As delivered, the registered user landing page includes all of the tiles that are available to anonymous users and these additional tiles:

Menu Link	Description
<b>Report an Issue</b>	<p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.</p> <p>See <a href="#">Reporting Issues</a>.</p>
<b>Applications</b>	<p>Displays a list of the user's own applications, including business license applications, permit applications, and planning applications. From the list, the user can access application details.</p> <p>The list has a regular list view, a grid view, and a map view. There is also a <b>Show All Statuses</b> switch for toggling between a list of active applications and all applications.</p> <p>The number of active applications appears in the tile label. This number includes both permit applications and planning applications.</p> <p>If one or more conditions have been applied to the user's applications, a conditions icon appears below the tile. The icon associated with the most severe condition is displayed. For example, if there is a permit application with a lock condition (which prevents further activity on the permit) and another application with a notice or informational condition, only the lock icon appears below the tile.</p>
<b>Business Licenses</b>	<p>Displays a list of the user's own business licenses. The tile is visible only if the user has at least one active business license. The number of active business licenses appears in the tile label.</p> <p>The list displays summary information about licenses, including the license ID, license type, license status, the license period, the business name and physical address, a description, and fee information.</p> <p>There is also a <b>Show All Statuses</b> switch for toggling between a list of active licenses and all licenses.</p>

Menu Link	Description
	Users can click individual licenses for additional details or to take any actions such as viewing the certificate.
<b>Inspections</b>	<p>Displays a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.</p> <p>The number of scheduled and requested inspections appears in the tile label.</p>
<b>Projects</b>	<p>Displays a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact.</p> <p>This tile is hidden from users who do not have any projects.</p> <p>The number of active and completed projects appears in the tile label.</p>
<b>Businesses</b>	<p>Displays a list of the businesses associated with the user's business licenses. This tile is visible only if the user has at least one active business. The number of active businesses appears in the tile label.</p> <p>Users can review summary information about a business and click an individual business for additional details.</p> <p>The list displays the business ID, legal name, mailing address, and location.</p>

## The Digital Assistant Button

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

This image shows the digital assistant button.



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

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

## 2 Applying for a Permit

### Choosing an Application Type

Your agency sets up application types for permit applications, planning applications, and business license applications. Before starting an application, users must choose what type of application they need. The Apply page provides multiple tools to help users choose the appropriate application type.

#### Working With the Apply Page

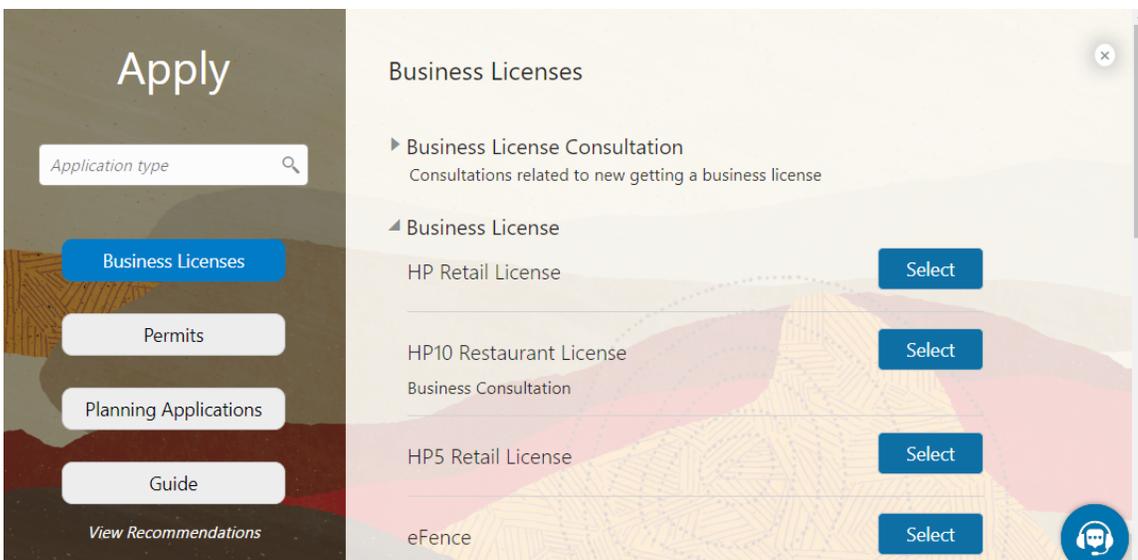
The Apply page offers these options for finding application types:

Option	Description	Available to Which Users
Search	Search for an application type by name.	All
Recent application types	View the five application types for the applications that you most recently submitted.	Registered public users, agency staff
Popular application types	View the five application types that have been used most frequently in the last 30 days	All
Browse application types	Choose either business licenses, permits, or planning applications, then browse categories for the selected item. Expand a category to browse the specific application types within the category.	All
Guided questionnaire (includes saving and retrieving recommendations)	Answer questions about your needs, and the guide provides recommendations regarding the necessary application types.	Registered and anonymous public users

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



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



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

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

For information about setting up the application type categories, see [Setting Up Business License Display Groups](#), [Setting Up Permit Display Groups](#), or [Setting Up Planning Application Display Groups](#).

## Accessing the Apply Page

Anonymous and registered public users can access the Apply page from the landing page by clicking the **Apply** tile. Anonymous users can explore application types, but they are prompted to sign in or register before actually starting an application.

Registered users and agency staff have these additional options

- On the landing page or agency springboard, select the *Start an Application* quick action in the **I Want To** field, then click the **Go** button.
- On the Applications page (registered users) or the Transactions page (agency staff), click the **Apply** button.
- On the Explore Your City map (registered users) or the Main Map (agency staff), click the **Apply** button after selecting a parcel.

## Searching for Application Types By Name

To search for an application type by name:

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

## Searching for Popular and Recent Application Types

To search for popular and recent application types:

1. Click in the search field.
2. Review these lists of popular and recently used application types.  
The lists appear in the overlay on the right panel of the Apply page. They can include a mix of business license, permit, and planning application types.

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

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

## Browsing for Application Types

To browse for application types:

1. Click the button for **Business Licenses, Permits, or Planning Applications** on the left side of the Apply page. After you click a button, the overlay on the right side of the page lists categories for the specified type of transaction.
2. Expand categories to browse the application types.
3. To start an application, click **Select** for the desired application type.

## Using a Guided Questionnaire to get Application Type Recommendations

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

To find application types using a guided questionnaire:

1. Click the **Guide** button to open the guided questionnaire.  
This button appears only if the agency has configured an Oracle Intelligent Advisor policy for recommending application types.
2. Step through the questionnaire.  
At the end of the questionnaire, the guide will recommend application types and provide an option to save the recommendations.
3. Optionally save the recommendations.  
A registered user follows these steps to save the recommendations:
  - a. Enter a nickname for the recommendations in the **Nickname** field.
  - b. Click **Save**.  
The recommendations are associated with the user account and can be retrieved from the Apply page.An anonymous user follows these steps to save the recommendations:
  - a. Enter an email address in the **Email ID** field.
  - b. Enter a nickname for the recommendations in the **Nickname** field.
  - c. Click **Save**.  
The system sends the user an email with an acknowledgement number that can be used to retrieve the recommendations from the Apply page.

## Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

1. Sign in.

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

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

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

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

## Getting an Online Fee Estimate

Agency staff and registered applicants can get fee estimates online outside of the application process.

The online calculator estimates application fees based on the fee structure of the application type.

After signing in, you can select the Estimate Fees action on the Agency Springboard. Public users select this action on the registered user landing page. From the Apply page you can initiate an application for a permit, but for a fee estimate you'll launch the fee calculator from the fee estimate icon. Based on the fee structure for the application you choose, you'll enter information that is relevant to the fees, without filling out an application. The estimated fees are calculated and displayed for your review with fee line descriptions and amounts. You'll also see whether a fee is due when you submit the application or payable later when required. You might want to simulate new scenarios simply by entering new values, or by selecting a different type of application. Once you have a fee estimate and decide to move forward, you can begin the application process, if desired.

**Note:** The calculated fees are only an estimate and may change without notice. The final fees are determined when you submit the application and during application processing.

Here's how to get an estimate:

1. Go to the Agency Springboard if you are gathering information for a public user. Registered public users can go to their landing page.
2. In the **I Want To** quick actions drop-down list, select *Estimate Fees*.
3. Once you're on the Apply page, find the application type you want and click the **Estimate Fees** icon. For example, if you want to get an estimate for a building permit, click the icon next to the button to start a building permit application.
4. Fill out the form to the best of your knowledge with the information required to calculate the fees. For example, enter the square footage of the building.
5. Click **Calculate**.
6. For different scenarios, enter new values and click **Calculate** to see the updated estimate.

The estimated fees are displayed for your review with the fee description, amount, and whether the fee is due when you submit the application or payable when required.

## Completing an Application

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

Applications for business license renewals and amendments also follow this process. For more information, see [Applying for a Business License Renewal](#) and [Applying for a Business License Amendment](#).

This example illustrates an application.

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

## Data Entry Pages

The application begins with data entry steps that the agency configures. There can be one or many data entry steps. Agencies configure the sections and fields for each data entry step.

Data entry sections are generally self-explanatory, but the following table includes notes about certain sections:

Section	Notes
<b>Applicant</b>	<ul style="list-style-type: none"> <li>All applications include this section, which is used to identify the applicant.</li> <li>When a registered public user starts an application, this section is prepopulated, and certain identifying fields are read-only. Updates made to the address, phone, or email when applying can be saved to the user’s account profile.</li> <li>Agency staff members who complete an application on behalf of a member of the public must identify the applicant by selecting an active profile for an existing registered user or by registering a new user.</li> </ul>

Section	Notes
	<p>When registering a new user, the staff member can continue with the application after entering and submitting the required registration information. A confirmation email is sent to the account email address so the user can complete the registration process by clicking the provided link and setting an account password. The registration is valid even if the agent abandons the application.</p> <p>Staff members can't accept the terms of use on behalf of users that they register. Instead, users are prompted to accept the terms when they first sign in.</p> <p>Registered users and agency staff with appropriate permissions can update the applicant's address, phone, or email in subsequent applications and optionally save the changes to the user's account profile. System administrators can also update account information.</p> <p>See <i>The Public User Registration Process</i></p>
<b>Application</b>	<p>The Application section includes the record ID and a field where applicants can enter a description. Agency staff also provide the date the application was received while entering data into the system. The received date field isn't available for applicants applying online.</p>
<b>Terms and Conditions</b>	<ul style="list-style-type: none"> <li>• If a data entry step includes the Terms and Conditions section, public users must agree to the terms before continuing past that step.</li> <li>• Agency staff can't accept terms on behalf of a public user, so this section is hidden from agency staff.</li> </ul>
<b>Contacts</b>	<p>All applications:</p> <ul style="list-style-type: none"> <li>• The Contacts section lists people who are contacts for this specific application. These people can be, but aren't required to be, the applicant's profile contacts.</li> <li>• Select an existing contact from a list, or enter information for a new contact on the Contact Details page.</li> <li>• All application contacts must have a contact type that describes the role of the person relative to the specific application.</li> </ul> <p>Permits and planning applications:</p> <ul style="list-style-type: none"> <li>• On the Contact Details page for new contacts, use the <b>Add to Profile</b> switch to replicate the new contact to the applicant's list of profile contacts.</li> <li>• On the Contact Details page for already-added contacts, use the <b>Update Profile</b> switch to replicate any changes (such as an updated email or phone number) to the profile contact. This switch appears only if the contact is already a profile contact.</li> </ul> <p>Permit applications:</p> <ul style="list-style-type: none"> <li>• If the contact type is configured to allow permit access, and the contact email matches the account email for a registered user, then that registered user can access the permit.</li> <li>• When prompting for a contact type, the user can see which types allow permit access.</li> <li>• The list of contacts for the application includes columns that display the contact type and whether permit access is enabled for that type.</li> <li>• The page where you enter or edit contact details includes explanatory text to ensure that users are aware when the selected contact type confers permit access.</li> <li>• For more details about a contact's access to a permit, see <i>Setting Up Contact Types</i>.</li> </ul>
<b>Contractor</b>	<p>Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are required to enter a license number. The license number can be used to retrieve additional information about the license and the business from the agency's main contractor records if the</p>

Section	Notes
	<p>information already exists there. If you integrate with an external licensing body, the information can be retrieved from the licensing body's records.</p> <p>Applicants who are not contractors or authorized agents, such as homeowners, can optionally enter license numbers to retrieve information about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant. The other contractor information fields such as the business name and address are not available but can be retrieved when a valid license number is entered.</p> <p>For more information, see <a href="#">Contractor License Overview</a>.</p>

## Review Page

A *Review* step appears after the last data entry step for an application. The page for the Review step shows all of the data entry sections on a single long read-only page.

## Confirmation Page

If the application includes a confirmation page, it appears after the review page. This page can have any name.

A common scenario is to show a fee summary on the confirmation page. Displaying a read-only fee summary at the very end of the application, after all data entry is complete, ensures that the fee calculations are final.

## Single Page View and Multi-Page View

A drop-down field at the top of the application page lists the steps, including data entry pages, the Review page, and the confirmation page. Selecting a step takes the user directly to that step.

The final item on the step list is an option to toggle between the *Single-Page View* and *Multi-Page View*.

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

## General Navigation Controls

The banner above the application form includes these buttons for general navigation:

- **Previous** and **Next** buttons enable users to move through the steps.
  - On the final step, a **Submit** button replaces the **Next** button.  
Submitting an application initiates the workflow for the application. Registered public users can't make changes to submitted applications.
- Note:** After submitting a business license application, you can't make changes to the business information. Once the license is approved, you follow the amendment process for any changes. See [Applying for a Business License Amendment](#).
- The **Save** button lets users save their progress without submitting the application.  
You'll see warnings when you save an incomplete application, but you can still save the application and complete it later.
  - The **Close Application** button closes the application and discards unsaved changes.

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



# 3 Using the Agency Springboard and the Task List

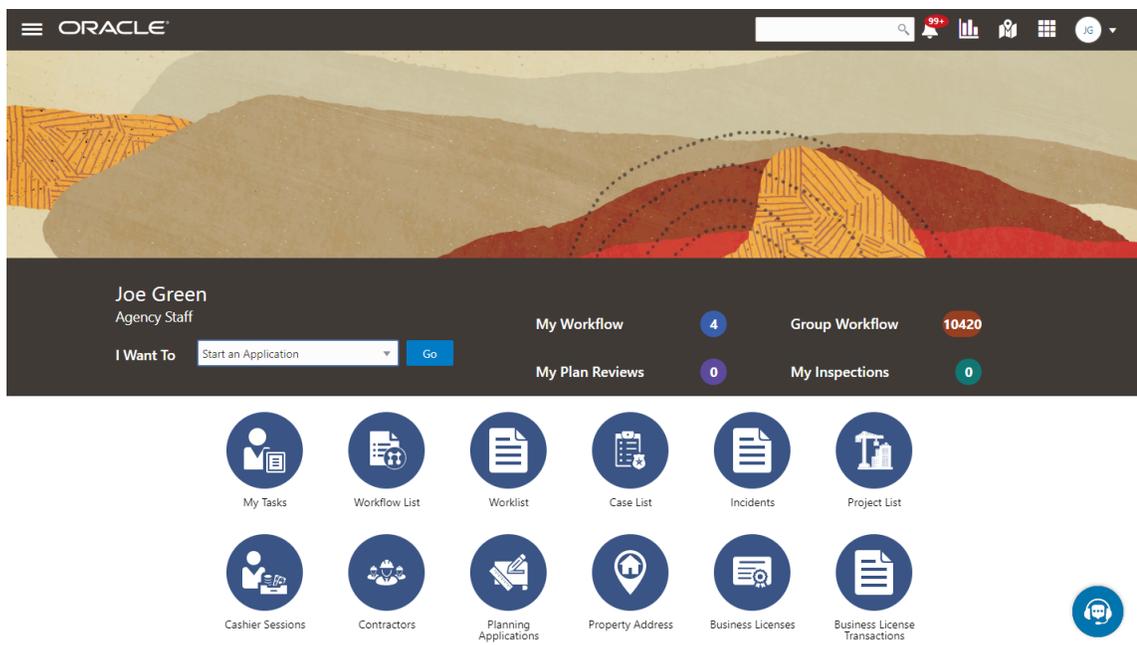
## Using the Agency Springboard

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

The Agency Springboard provides agency staff with a central launching page for access to tasks and pages that are relevant to the staff member's role.

Some of the elements on the agency springboard are similar elements on the landing pages for public users, while others are specifically for agency staff.

This example illustrates the Agency Springboard. The springboard is configured to show the quick actions section ("I Want To" actions), the task list element (links to workflow tasks and to my plan reviews and my inspections), and a selection of springboard tiles. The alerts banner is not shown in the example.



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

## Global Banner

The global banner appears at the top of pages throughout the system.

The global banner for public users does not include all of the elements that are available to agency staff. The banner for agency staff includes these elements:

Page Element	Description
	<p>Click the <b>Back</b> icon to return to the previous page. The banner doesn't include this icon when you're on the springboard.</p>
	<p>Click the <b>Navigator</b> icon to access pages using a hierarchical menu.</p>
	<p>Click the <b>Home</b> icon to return to the Agency Springboard. The banner doesn't include this icon when you're already on the springboard.</p>
<p><b>Global Search</b> (unlabeled search box)</p>	<p>Enter search terms, then press enter or click the search icon to search for any of these objects:</p> <ul style="list-style-type: none"> <li>• <b>Permits:</b> In process and completed permit applications.</li> <li>• <b>Planning Applications:</b> In process and completed planning applications.</li> <li>• <b>Inspections:</b> Scheduled and completed building inspections.</li> <li>• <b>Projects:</b> Active projects.</li> <li>• <b>Incidents:</b> In process and completed incidents.</li> <li>• <b>Cases:</b> In process and completed cases.</li> <li>• <b>Citations:</b> Paid and unpaid citations.</li> <li>• <b>Business Licenses:</b> Active, inactive, expired, suspended, revoked, and closed business licenses.</li> </ul> <p>Searching opens the search results page, which has tabs for each type of searchable object. Click a tab to see the indicated subset of search results, and click a row in the search results to access the object details.</p> <p>Tabs for features that you haven't implemented are hidden. For example, if you don't use project functionality, the Projects tab is hidden.</p> <p><b>Note:</b> Public users also have access to the global search, but their search results do not include code enforcement objects (citations, incidents and cases).</p>
	<p>Click the <b>Notifications</b> icon to open a pop-up window that lists the most recent unread notifications. Each notification row includes an action menu for marking the notification as read and a details button for opening the Notification Details page. The pop-up window also has a <b>View All</b> button that opens the Notifications list page, where you can access all of your notifications.</p> <p>A badge on the icon indicates the number of unread notifications. If there are more than 99 unread notifications, the badge displays 99+.</p>
	<p>Click the <b>Reports and Analytics</b> icon to access the Oracle Business Intelligence Catalog (BI Catalog) or access predefined dashboards.</p>
	<p>Click the <b>Maps</b> icon to access these maps:</p> <ul style="list-style-type: none"> <li>• The main agency map lets you view existing transactions or start new applications for properties that you select.</li> <li>• The Public Hearing map lets you generate hearing notifications by defining an area and generating lists of parcels, owners, and addresses for that area.</li> </ul> <p>If you only have security access to one map, clicking the Maps icon opens that map. If you have access to both maps, clicking the Maps icon opens a menu so you can choose which map to open.</p>

Page Element	Description
	<p>Click the <b>Page Finder</b> icon to open a pop-up window where you can search pages by their full or partial page name. As you type, the page list is updated to match your criteria. Click any page in the list to access it.</p> <p>The page finder provides a convenient alternative to the hierarchical menu navigation found in the Navigator.</p>
	<p>Your user account is represented by a circle with your initials. Click this icon to access a menu with options for updating your user preferences, changing your password, or signing out. This menu also includes a Help item that provides access to system documentation.</p>

## Alerts

Alerts are displayed as a banner that broadcasts messages with important information. These alerts are configured by the agency administrators.

## Quick Actions (I Want To)

You can perform quick actions section using the **I Want To** drop-down list. Choose an action, such as starting an application or scheduling an inspection, then click **Go** to access the related page.

This table lists the actions in the **I Want To** list. You see only the actions to which you have security access.

Action	Description
<i>Start an Application</i>	Opens the Apply page, where you can chose an application type and start an application. See <a href="#">Choosing an Application Type</a> .
<i>Estimate Fees</i>	Opens the Apply page, where you can chose an application type and estimate fees for your application. See <a href="#">Getting an Online Fee Estimate</a> .
<i>Schedule an Inspection</i>	Opens the Inspection List page, where you can request a permit inspection. See <a href="#">Requesting Inspections</a> .
<i>Report an Issue</i>	Opens the Select an Issue Type page, where you can being the process of reporting a code enforcement issue. See <a href="#">Reporting Issues</a> .
<i>Pay Citation</i>	Opens the Pay Citation page, where you can enter a citation ID and enter payment information on behalf of a public user. See <a href="#">Paying Citations</a>

## Task Lists

The task list section provides links to the Task Management page. Each link corresponds to a specific tab on the Task Management page. Use the links and the tabs to view the indicated type of task. The number next to each link provides a count of the indicated type of task.

- **My Workflow**
- **Group Workflow**
- **My Plan Reviews**
- **My Inspections**

**Note:** Your security roles determine whether you see role-specific links such as My Inspections and My Plan Reviews.

For more information about tasks, see *Managing Tasks*.

## Tiles

The lower area of the springboard displays tiles that you click to access specific transactions.

## Managing Tasks

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

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

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

## Reviewing and Managing Tasks

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

Task Tab	Description	Available Actions
<b>My Plan Reviews</b>	Lists plan reviews that are assigned to you in ascending order by due date.	None
<b>My Workflow</b>	Lists tasks that are assigned to you.	Release Reassign

Task Tab	Description	Available Actions
<b>Group Workflow</b>	<p>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.</p> <p>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.</p>	<p>Claim</p> <p>Reassign</p>
<b>All Workflow</b>	<p>Lists all tasks assigned to groups to which you belong, including tasks that are assigned to you and to other group members.</p>	<p>Claim</p> <p>Reassign</p>

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
<b>Task Type</b>	<p>Identifies the nature of the task to be performed. Values include:</p> <ul style="list-style-type: none"> <li>○ <i>Inspection</i></li> <li>○ <i>Plan Review</i></li> <li>○ <i>Workflow</i></li> </ul> <p>The <i>Workflow</i> task type represents overall transaction workflow.</p>
<b>Transaction</b>	<p>Displays the transaction type number. For example, in the case of a permit, it displays the permit number and permit type for the associated permit.</p>
<b>Tasks</b>	<p>Displays a task name and identifier that depend on the task type:</p> <ul style="list-style-type: none"> <li>○ For workflow tasks, the workflow process name and task ID appear. The task ID is for the specific instance of the task.</li> <li>○ For inspection tasks, the inspection name and ID appear.</li> <li>○ For plan review tasks, the plan review name and cycle count appear.</li> </ul>

Page Element	Description
<b>Status</b>	Displays the task status. Different types of tasks can have different statuses. For example, inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks.
<b>Assignment</b>	Displays the date that the task assignment was last updated and to whom the task is assigned.
>	Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.

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

## Reassigning a Workflow Task

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

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

To reassign a workflow task:

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

Use the search, filter, and sort options to help you refine the task list.

3. Click the **Actions** icon, and then select **Reassign**.

The Reassign Task page appears.

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

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

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

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

# 4 Managing Permits

## Managing Transactions

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

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

**Note:** This topic focuses on permits and planning applications. The Transactions page can also display business license transactions. For information about viewing business license transactions, see *Managing Business License Transactions*.

- Manage application activity.
- Create or resubmit permit and planning applications on behalf of applicants.
- Cancel pending and payment pending applications on behalf of applicants.
- Manually enter fee payments on behalf of applicants.
- Copy an existing permit, planning application, or a pre-application into a new application.
- Access details about permit and planning application activity.

Agency staff can access the Transactions page by clicking the **Permits** or **Planning Applications** tile on the agency springboard. You can access the list page on a phone as well as on a laptop or desktop computer. The layout changes based on the device you are using.

## Registered User View

The Transactions page provides a summary of permits and planning applications to agency staff only. Registered users who have applied for a permit or submitted a planning application for themselves or as a representative for someone else, see only the applications that they are associated with on the Applications page.

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

The Applications page contains basic application information for the logged in user. The user profile controls which application data appear on the Transactions and Applications pages for agency staff and applicants, respectively.

## Using the Transactions Page

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Click the link for the specific type of application you want to view:
  - **Business Licenses:** View a list of business license transactions.
  - **Permits:** View a list of permit applications.
  - **Planning Applications:** View a list of planning applications.

- o **All:** View a list showing all transaction types.

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

Page Element	Description
<b>Download</b>	Click the download button to export the list to a .csv file.
<b>Show All Statuses</b>	<p>Use this switch to filter the list based on transaction status:</p> <ul style="list-style-type: none"> <li>o If the switch is off, the list includes only active transactions.</li> <li>o This is the default setting if any active transactions exist.</li> <li>o If the switch is on, the list includes transactions in all statuses, including active, inactive, canceled and withdrawn applications.</li> <li>o This is the default setting if there aren't any active transactions.</li> </ul>
<b>Search</b>	<p>Search by alphanumeric characters on the fields for permits or planning applications in the list. The permits or planning applications that meet the search criteria are displayed on the page.</p> <p>When you search on dates, use this format: MM/DD/YYYY.</p> <p>Search results display only the primary address for the permit or planning application. You can confirm the correct transaction by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.</p>
<b>Filter By</b>	<p>Apply filters to display permits or planning applications that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</p> <p>As a planner, you can also find the planning applications assigned to you or unassigned applications by selecting predefined filters, <i>My Assigned Applications</i> or <i>Unassigned Applications</i>, respectively.</p>
<b>Sort By</b>	<p>Here are some of the sorting options:</p> <ul style="list-style-type: none"> <li>o <i>Application</i></li> <li>o <i>Type</i></li> <li>o <i>Status</i></li> <li>o <i>Creation Date</i></li> <li>o <i>Created By</i></li> <li>o <i>Applicant</i></li> <li>o <i>Total Fees</i></li> <li>o <i>Total Due</i></li> <li>o <i>Expiration Date</i></li> </ul>

Page Element	Description
<b>List View</b>	View the inventory of permits or planning applications in a list.
<b>Grid View</b>	View the inventory of permits or planning applications on a grid.
<b>Map View</b>	<p>View the inventory of permits or planning applications on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See <a href="#">Viewing Map Markers</a>.</p>

## Managing Application Activity

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. You can go to a specific type of application on the Transactions page:
  - o **Business Licenses:** View a list of business license transactions.
  - o **Permits:** View a list of permit applications.
  - o **Planning Applications:** View a list of planning applications.
  - o **All:** View a list showing all transaction types.
3. Use the information on the Transactions page to manage applications created by public users.

Here are some of the information you can look at:

Page Element	Description
<b>Application</b>	<p>View the application ID, application type, and status.</p> <p>Review the application status, for example, <i>Payment Pending</i>, <i>Submitted</i>, <i>Pending</i>, <i>Permit Issued</i>, and so on.</p>
<b>Property</b>	<p>View parcel information.</p> <p>Review the parcel information, including the street address, if available.</p> <p>The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.</p>

Page Element	Description
<b>Description</b>	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.
<b>Additional Information</b>	<p>Review the user name of the person who filled out the application and the date the application was created. For example, the application was <i>Created by John Doe on 12/20/2018</i>.</p> <p>Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, <i>Applicant: John Doe</i>.</p> <p>View expiration notifications. For example, <i>Expires in 1 day</i> or <i>Expired on 10/01/2019</i>.</p>
<b>Planner</b>	View the planner assigned to a planning application. This field appears only on the <b>Planning Applications</b> list.
<b>Fees</b>	Review the total fees that may be applicable to the permit or planning application and a fee balance if the total has not been paid.
	<p>Select the <b>Pay</b> button in the <b>Actions</b> column to submit a payment on behalf of the applicant.</p> <p>Applicants typically pay their fees online using the payment cart. Instead of going to the payment cart, the <b>Pay</b> button takes you to the Pay Fees page where you can initiate a full or partial payment.</p> <p>If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p>For more information about paying fees, see the <a href="#">Payment Flow Overview</a>.</p>
	<p>Select the <b>Resubmit</b> button to resubmit an application.</p> <p>The application status is <i>Pending Submit</i> because there may be a problem initiating workflow. Click the <b>Resubmit</b> button to retry initiating workflow.</p> <p>Resubmitting the application does not affect the fee calculations.</p>
	<p>Select the <b>Actions</b> button for options:</p> <ul style="list-style-type: none"> <li>○ <i>Copy Application</i>: Click to copy the details of the selected application to a new application.</li> <li>○ <i>Cancel Application</i>: Click to cancel an application with a pending or payment pending status. The button appears only when the application has a pending status.</li> </ul>

## Identifying Transactions Page Icons

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

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

## Starting an Application

Here are two ways that you can start new applications for applicants from the Agency Springboard. Both options take you to the Apply page, where you can choose an application type to begin the application.

- In the **I Want To** quick actions section, select *Start an Application*.
- Select the **Permits** or **Planning Applications** tile.

Click **Apply** on the Transactions page.

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

For more information about filling out an application, see [Completing an Application](#).

## Updating an Application

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

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

Here's how you update an existing application from the Agency Springboard:

1. Select the **Permits** or **Planning Applications** tile.
2. Click the row for the selected application to open the details.
3. Go to the page for the information of the existing application that you would like to update, using the links in the left navigation panel. The actions vary by your role and the specific page.

For more information, see [Working with Permit Details](#).

## Canceling a Pending Application

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

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

## Entering Application Fee Payments

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

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

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

## Copying an Application

Applicants and agency staff can copy an existing application into a new application using the **Copy Application** action button on the Transactions page.

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

## Accessing Application Details

You can access application details from the Transactions page.

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

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

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

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

## Copying an Application

Agency staff and applicants can copy existing permit and planning applications into new ones using the Copy Application option. You select which attributes to copy from the source application.

Applicants can copy their own applications from the Applications page. Agency staff with the appropriate access can copy applications from the Transactions page.

To copy an application:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, find the permit, planning application, or pre-application that you want to copy.
3. Click the **Actions** icon in the row of the application you want to copy.
4. Click the **Copy Application** action.
5. On the Copy Application page, use these fields to confirm the source application information and choose the application type for the new application:

Page Element	Description
<b>Copy From</b>	Displays the source application ID.
<b>Application Type</b> (read-only)	Displays the application type for the source application.
<b>Copy To</b>	Displays the text <i>New Application</i> in place of an ID for the new application. The new application ID is generated when the application is submitted.
<b>Application Type</b> (enterable)	Select the application type for the new application. The application type from the source application is the default value.

6. Use the **Application information to copy** section to control which information gets copied to the new application.

**Note:** Custom fields in the intake form are not controlled by these options. If the new application type is the same as the source application type, then data from custom fields is always copied. Custom data is not copied when the application types are different.

Page Element	Description
<b>Description</b>	Review and optionally modify the description of the source application to create the description for the new application.
<b>Property</b>	Select this check box to copy the property information from the source application.

Page Element	Description
	<p>If the new application type doesn't include the Property predefined field group, property information is not visible in the intake form, but it's still copied to the new transaction.</p>
<b>Contacts</b>	<p>Select this check box to copy contacts from the source application.</p> <p>If the new application type doesn't include the Contacts predefined field group, contact information is not visible in the intake form, but it's still copied to the new transaction.</p>
<b>Application Details</b>	<p>Select this check box to copy application data from predefined field groups other than the ones that are controlled by separate check boxes (that is, field groups other than property, contacts, contractor, and authorized agents) .</p> <p>If the new application type is different from the source application type, copying only occurs for sections that exist in both the application types.</p>
<b>Contractor</b>	<p>Select this check box to copy contractor and authorized agent information from the source application.</p> <p>Copying adds the contractor license number to the new application. If the license number exists in the main contractor records, then the rest of the contractor data is pulled from the main records into the new application. If the license number doesn't exist in the main contractor records, then all data is copied from the source application.</p> <p>The authorized agent data indicates if the applicant is an authorized agent for the contractor. The logic for copying this data depends on how the applicant information is handled:</p> <ul style="list-style-type: none"> <li>○ If a public user copies an application, and the user's account profile indicates that the profile is for a contractor, the authorized agent data is copied.</li> <li>○ If agency staff copies from a planning pre-application to a regular application, the applicant information and authorized agent data is copied.</li> <li>○ If agency staff copies from a regular application to another regular application, the applicant information is not copied, and therefore the authorized agent data isn't copied.</li> </ul> <p>If the new application type doesn't include the contractor and authorized agent predefined field groups, the data is not visible in the intake form, but it's still copied to the new transaction.</p>

7. Click **Copy Application**. The new application page opens and you can make changes to the fields before submitting.

## Canceling an Application

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

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

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

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

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

Created by Joe Green on 12/5/19 Applicant: William Brown	Fees Balance	158.13 USD 158.13 USD	
Created by Lola Nguyen on 12/5/19 Applicant: William Brown	No fees		

The image shows a table with two rows of application data. The first row has fees of 158.13 USD. The second row has 'No fees'. A red box highlights the 'Cancel Application' link in the actions menu of the second row.

## Canceling Pending Applications

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

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

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

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

## Working with Permit Details

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

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

Here's how you access the permit detail pages:

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

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

Page Name	Description
Overview	View the core information regarding the selected permit with links to more detail.  See <a href="#">Viewing the Permit Summary</a> .
Property Information	View parcel data from the permit application and a map of the parcel location.  See <a href="#">Working with Property Information</a> .
Workflow	View the workflow status of each task as defined by the agency using Oracle Autonomous Integration Cloud (OIC).  See <a href="#">Using Workflow</a> .
Application Details	Review information captured during the application intake that is specific to the permit type. For example, for a solar permit, the applicant enters the number of solar panels to be installed.  See <a href="#">Viewing Permit Application Details</a> .
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 <a href="#">Managing Manual Plan Review Cycles</a> and <a href="#">Managing Electronic Plan Review Cycles</a> .
Contractor	Identify the contractor who is performing the work identified in the permit or planning application, and indicate whether the applicant is an authorized agent of the contractor (for example, an employee of the contractor).  See <a href="#">Working With Contractors and Agents in Applications</a> .
Contacts	Review and add contacts for the permit.  See <a href="#">Adding Contacts to Applications</a> .
Conditions	Review conditions placed on the permit or person that must be resolved to complete the permit process.  See <a href="#">Applying Conditions to Applications</a> .
Attachments	View a list of files and upload or download documents on this page.  <a href="#">Working with Attachments</a> .
Comments	Review or add comments pertaining to this permit.  <a href="#">Working with Comments</a> .
Inspections	Review a consolidated list of inspections related to a permit. As a permit coordinator, you manage inspection activity for the permit on this page.

Page Name	Description
	See <a href="#">Managing Inspections for a Permit</a> .
Time Recording	Review time entries for work performed on the inspections and plan reviews for the permit. You can assess fees for time entries that haven't yet been billed.  See <a href="#">Assessing Fees for Time Entries</a> .
Fees and Payments	Review fees assessed and payments due. You can also add ad hoc fee items, use the fee calculator for additional fees, and adjust, refund, and pay fees from this page.  See <a href="#">Working with Fees and Payments</a> .
Projects	View the summary of projects associated with a permit in the permit details. The permit can be assigned to multiple projects.  See <a href="#">Viewing Project Summaries</a> .
Communications	Send ad hoc email messages and notifications associated with this permit.  See <a href="#">Working with Application Communications</a> and <a href="#">Working with Ad Hoc Communications</a> .
Status History	View the history of application status changes.  See <a href="#">Viewing Application Status History</a> .
Related Transactions	Create and view links between transactions.  See <a href="#">Working with Related Transactions</a> .

## Viewing the Permit Summary

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

When you access the details for a permit, you see a summary of the permit activity.

The header of the summary page displays the address of the primary parcel and its physical location on a map. This information is updated to show the latest activity. For example, when the primary parcel address detail is modified on the Property Information page, the same is automatically updated in the header and in the permit Overview page.

Only agency staff can update the date the application was received or withdraw an in-progress application on the Overview page. Both agency staff and the applicant can add a description of the application.

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

## Using the Overview Page

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

Page Element	Description
<b>Status</b>	Review the application status.
<b>Completed Date</b>	Review the date the application was completed.
<b>Description</b>	Enter a description of the application by clicking the <b>Add</b> link in the <b>Description</b> field. The agency staff or applicant can add a description.
<b>Submitted By</b>	Review the name of the person who submitted the application and the date when it was submitted.
<b>Received Date</b>	<p>Review the date when the permit application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page.</p> <p>For applicants submitting their application online, the received date field isn't available in the intake form or on the Overview page.</p>
<b>Expiration Date and Extend</b>	<p>Review the expiration date of the application.</p> <p>If the <b>Extend</b> link is available next to the <b>Expiration Date</b> field, agency staff can enter a new expiration date that allows more time before the application or permit expires. You must have appropriate permissions associated with your role to manually extend a permit.</p> <p>Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the permit type, you'll see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see <a href="#">Expiration Overview</a> and <a href="#">Working with Application Expiration</a>.</p>
<b>Withdraw Application</b>	<p>Click the <b>Withdraw Application</b> button to change the application to a withdrawn status. When you withdraw an application, any scheduled inspections or plan reviews are canceled.</p> <p>For more information about withdrawing an application, see <a href="#">Withdrawing an Application</a>.</p>

Page Element	Description
<b>Print Permit</b>	<p>Click to view the permit in PDF format in a separate browser tab. This button appears only after the permit is issued.</p> <p><b>Note:</b> This option is available for public users by default. You turn off the <b>Allow Public User to View</b> switch on the Permit Type page to make this option unavailable for public users. Additionally, your browser's pop-up blocker must allow pop-up windows from the environment domain to generate the PDF of the permit.</p> <p>See <i>Setting Up Permit Types</i>.</p>

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

Page Element	Description
<b>Applicant</b>	<p>View the applicant's name and contact information.</p> <p>Click the <b>View Details</b> link to open the Contacts page, where you can add additional contacts.</p>
<b>Workflow</b>	<p>View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status.</p> <p>Click the <b>View Details</b> link to open the Workflow page.</p>
<b>Inspections</b>	<p>View the number of scheduled, upcoming, and completed inspections, as well as the number of inspections that have passed and failed.</p> <p>Click the <b>View Details</b> link to open the Inspection List page.</p>
<b>Fees and Payments</b>	<p>View the total fees paid, amount due, and the date and amount of the last payment.</p> <p>Click the <b>View Details</b> link to open the Fees and Payments page.</p>
<b>Projects</b>	<p>View the projects to which this permit belongs.</p> <p>Click the <b>View Details</b> link to open the Projects page, where you can see the list of projects in more detail. Click the <b>Project ID</b> link to find out more about the project, which may contain other permits.</p> <p>The Projects section is available only when the permit is associated with a project.</p>

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

## Withdrawing an Application

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

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

You can withdraw permit applications with one of these statuses:

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

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

- *Submitted*
- *In Progress*
- *Hearing*

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

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

The system status of the application changes to *Withdrawn*.

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

## Withdrawing In-Progress Applications

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

To withdraw an application:

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

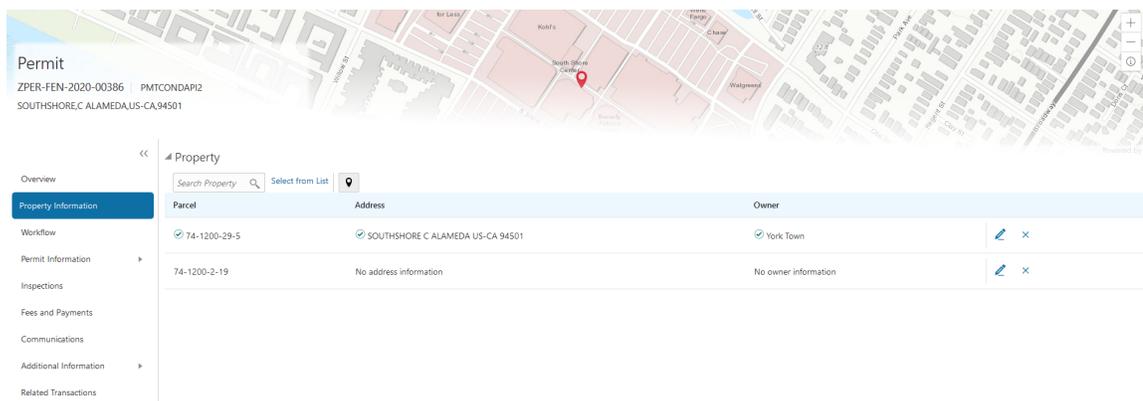
3. On the Overview page, click the **Withdraw Application** button.
4. On the Withdraw Application page, enter the reason for withdrawing the application.
5. Click **OK**.

## Working with Property Information

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

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

This example shows the Property Information page.



## Viewing Property Information

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

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

**Note:** The primary parcel, address, and owner are indicated with a green check mark. This address is also displayed in the header information of the summary page.

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

## Adding New Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. Click **Select from List** next to the **Search** field.
5. On the Search Property page, click **Create New**.

6. Enter parcel, address, and owner information on the Property Information modal page.

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

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

## Adding Existing Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. To add a single property:
  - a. Use the **Search Property** field to find the property that you want to add.

You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.
  - b. Click the property to add it to transaction. The selection appears in the grid on the Property Information page.
5. To add multiple properties:
  - a. Click **Select from List** to access the Search Property modal page.
  - b. Search for the properties that you want to add and select the check box next to them.

You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.

You can view all of the selected properties in the Selections tab.
  - c. Click **Done**. All of the properties that you selected appear in the grid on the Property Information page.

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

## Adding a Parcel from the Map View

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

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

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

## Modifying Property Details

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

**Note:** If the selected property has its parcel or address assigned as primary for the transaction, then you can't disable the **Primary** switch. You must first assign another parcel or address as primary, which automatically changes the selected property to non- primary.

6. Click **Save**. If you have modified the primary parcel address, the header of the summary page now shows the updated address.

## Deleting a Property

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

**Note:** You can't delete a property that has its parcel or address assigned as primary for the transaction. You must first assign another parcel or address as primary and then delete the non-primary property.

5. Click **OK** to confirm the deletion.

**Note:** Deleting a property automatically deletes any associated property conditions that are applied to the permit or planning application that you are working with. You can't delete a property if that's the only property added to the application.

## 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 application details page for the permit.

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

Permit Application Details	Description
Yard Sale	Enables applicants to specify yard sale information, such as the start time, end time, and the number of days.

## Updating Permit Application Details

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

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

## Using Workflow

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

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

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

## Workflow and Non-Workflow Tasks

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

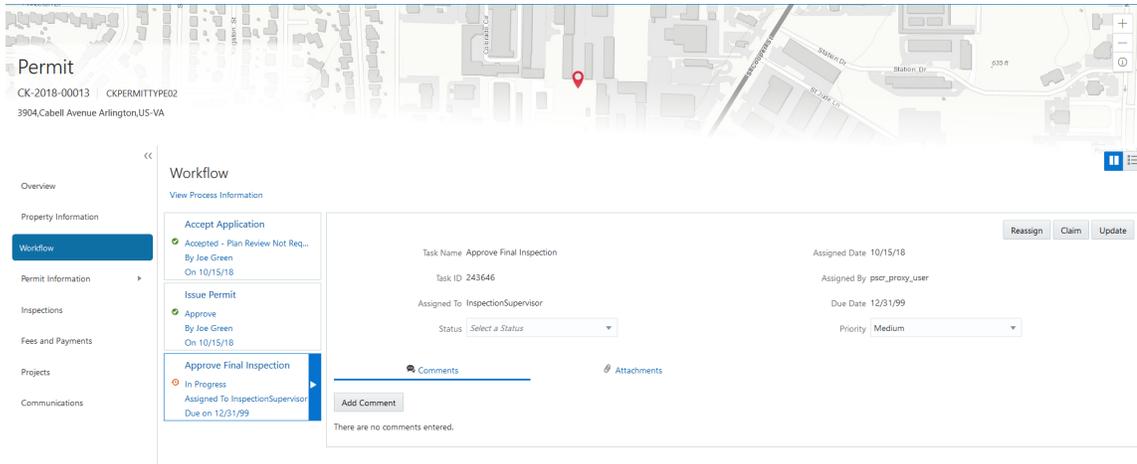
Oracle provides an additional page that agency staff can use to review both workflow and non-workflow tasks. For information about this functionality, see [Managing Tasks](#).

## Managing Workflow Tasks

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

Access the Workflow page by clicking the Workflow tab.

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



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

To manage a workflow task:

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

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

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

Panel	Description

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

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

Page Element	Description
<b>Task Name</b>	The task name as defined in the OIC workflow engine. For example, the <i>Application Acceptance</i> task is for reviewing and accepting a permit or planning application that has been submitted.
<b>Task ID</b>	The identifier for this specific instance of a task. For example, multiple permits or planning applications have an <i>Application Acceptance</i> task, but the Task ID for accepting the application is unique for each permit or planning application.
<b>Assigned To</b>	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.
<b>Assigned Date</b>	The date that the task assignment was last updated.
<b>Assigned By</b>	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.
<b>Due Date</b>	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
<b>Reassign</b>	Click to choose an assignee for the task.  See <i>Managing Tasks</i> .
<b>Claim</b>	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.

Page Element	Description
<b>Release</b>	<p>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.</p> <p>This button is visible only for tasks that are assigned to you.</p>

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

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

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

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

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

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

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

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

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

## Adding Comments to a Workflow Task

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

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

To add a comment to a task:

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

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

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

When the icon displays a closed padlock, the comment is hidden from the public.

6. Click **Save** to save the comment and return to the Workflow page.

## Modifying a Comment in a Workflow Task

To modify a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Modify the text of the comment as needed.

if you use the **Select Comment** option to add text from an exiting comment, the new text is added after any existing text.
4. To modify the comment visibility, click the **Hide From Public** icon.

Clicking the icon toggles the setting. When the icon displays an open lock, the comment is visible to the public. When the icon displays a closed padlock, the comment is hidden from the public.
5. Click **Save** to save changes and return to the Workflow page.

## Deleting a Comment from a Workflow Task

To delete a comment:

1. Access the workflow task.

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

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

## Managing Attachments for a Workflow Task

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

To manage attachments for a workflow task:

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

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

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

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

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

You are prompted to confirm the deletion.

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

## Viewing the Overall Workflow for an Application

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

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

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

To use the list view:

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

The task list displays:

- The **Task Name** and **Status**.
  - The **Last Updated Date**.
  - The **Days Taken**, which represents the number of days elapsed while the task is in progress.  
The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.
  - **Comments**, which displays the two most recent comments.  
For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.
6. To review task history, click a specific task to open the Task Details page.  
This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.
  7. Close the Task Details page to return to the workflow list view.

## Altering Workflow

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

To alter workflow:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Alter Workflow** button.
5. On the Alter Workflow make these changes:
  - **New Workflow Activity Name:** Select the desired workflow step.
  - **Update Transaction Status:** Select the proper status for the workflow step.
  - **Comments:** It is recommended to note who made the change and describe the circumstances requiring the manual intervention.

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

6. Click **Save**.

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

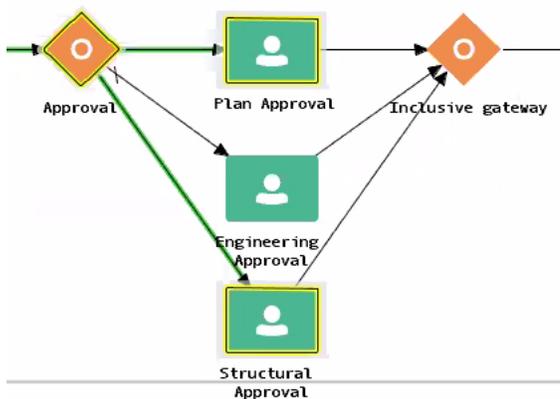
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

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

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

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

This example illustrates a workflow process definition with parallel tasks.



This example illustrates the Alter Workflow tab displaying parallel tasks.

Alter Workflow

▲ Plan Approval

New Workflow Activity Name: Plan Approval

▲ Structural Approval

New Workflow Activity Name: Structural Approval

Update Transaction Status: Submitted

Comments: [Text Input]

View Workflow Save Cancel

## Working With Contractors and Agents in Applications

Use the Contractor page to view or update license information for contractors who are performing work for a permit or planning application. This page also lets you indicate whether the applicant is an authorized agent for a contractor and whether this relationship is verified. If the intake form for the application collects contractor or authorized agent information, the Contractor page initially displays the data provided during the intake process.

Initially the fields on the Contractor page are read-only. Agency staff can make updates until the transaction is closed or canceled, and after that only users with system administrator privileges can update the contractor information. Public users can't make updates after the application has been submitted.

### Adding Contractors to a Transaction

The fields on the Add Contractor page for a license associated with a transaction correspond to the same-named fields on the main contractor pages. For descriptions of these fields, see *Managing Contractor Licenses*.

To add contractors and their license information to a transaction:

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Click **Edit**.
4. Click the **Add** icon.
5. On the Add Contractor page, enter values for a contractor, including the **License Type** and **Status** of the license. The **License Type** is needed only when the system doesn't integrate with an external licensing board.
6. Enter the license number of the contractor who is performing the work.
7. You can automatically fill the remaining contractor fields based on the license number. Enter a license number and click **Get Details** to retrieve data. Only system administrators can manually enter details.

If details are available, the data is added to the permit or planning application. Details come from the agency's contractor records if the license number already exists in the system.

If the agency integrates with an external licensing board, the system retrieves details from that organization when the contractor doesn't yet exist in the internal system.

If the details can't be retrieved, an error message informs you that the license number is not valid. If you are sure that the number is valid, you can reenter it and manually fill in the additional details.

8. To clear all information and start fresh, click the **Clear** button and go back to the step where you enter a license number.
9. Click **Done**.

On the Contractor page in the license grid, you'll see the information for the license you just added, including the contractor's or authorized agent's business name and contact information and the dates when the license is valid. Look in the column **Authorized Agent for This License** to see if the agency's contractor records or licensing body indicate whether this license information is for an authorized agent.

### Updating Contractor Information for a Transaction

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Click **Edit**.

4. Turn the switch on for yes or off for no to answer **Is the applicant either a contractor or a contractor's authorized agent?**. Public users, who are usually homeowners, are not contractors or authorized agents.
5. Select the row for the contractor's license that you want to edit.
6. On the contractor information page, update the details manually or automatically by entering a different license number and clicking **Get Details**. You can click **Clear** to remove the license number and enter another number.
7. Click **Done**.

## Removing Contractor Information from a Transaction

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Select the row for the contractor's license that you want to delete.
4. On the contractor information page, click **Delete**.
5. Click **Done**.

## Updating the Applicant's Status as an Authorized Agent

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Click **Edit**.
4. Make any necessary updates to the **Authorized Agent** section of the page:
  - a. Use the **Is the applicant an authorized agent?** switch to indicate whether the applicant is acting on behalf of the contractor.

If the application doesn't include contractor information, leave this switch turned off. You can still save if you turn it on, but it is meaningless without information regarding who the applicant represents.

- b. Set the **Verification Status**.

The default value is *Pending Verification*. After manually verifying the applicant's authorized agent information, set the status to *Verified* or *Verification Failed*.

5. Click **Save**.

If you identified a contractor and marked the applicant as an authorized agent, saving adds the authorized agent information to the contractor record.

## Adding Contacts to Applications

Agency staff can use the Contacts page to view, update, and add contacts for submitted applications.

The Contacts page displays the applicant's contact information and lists additional people who were added as contacts during the initial application process. If you want to add more contacts, you have two options:

- Select a contact who is already registered in the system, and make that person a contact for the current transaction.
- Create a brand new contact by entering all the contact details, and include that contact in the current transaction.

## Managing Application Contacts

To manage application contacts:

1. From the agency springboard, select the tile for the type of transaction where you want to manage contacts: **Permits, Planning Applications, or Business License Transactions.**
2. On the Transactions page, click the specific submitted application where you want to add new contacts.
3. In the left frame of the page, expand the application information section: **Permit Information, Planning Application, or License Information.**
4. Select **Contacts** in the expanded section.

The Contacts page displays the applicant information in the top section. Additional contacts are listed below the applicant information.

5. Optionally update the applicant’s address, phone number, and email at the top of the page.
6. In the **Additional Contacts** section, click **Add New Contact** to open the Contact Details page.

The Contact Details page has two sections:

- o The **Add from registered contacts** section lists existing registered contacts that can be added to the application.
  - o The **Add brand new contact manually** section provides a **Create** button for creating new contacts from scratch.
7. To add an existing registered contact to the application:
    - a. Locate the contact in the **Add from registered contacts** list.
    - b. Click the **Select** button at the end of the row for the contact.
    - c. In the Select Contact Type modal window that opens, enter the following information:

Page Element	Description
<b>Select Contact Type</b>	<p>Select the role or position of the contact person relative to the current application. For example, a contact might be a property owner, a business owner, or a contractor.</p> <p>When you add contacts for a permit, pay close attention to whether the contact type grants the person access to the permit. You can see the <b>Permit Access Enabled</b> field when you prompt for the contact type and when you review the list of contacts on the main Contact page. This information doesn’t appear in the context of non-permit applications.</p> <p>If the contact type allows permit access <i>and</i> the contact email matches the account email for a registered user, then that registered user can access the permit. For more information, see <a href="#">Setting Up Contact Types</a>.</p>
<b>Is This Primary Contact</b>	<p>Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.</p>

- d. Click **OK** to save the record and return to the Contacts page, which now lists the selected contact as a contact for this application.
8. To create a brand new contact:
- a. On the Contact Details list page, click the **Create** button in the **Add brand new contact manually** section.

The Contact Details page changes to create mode, which displays fields for entering the new contact's information.

- b. Enter the new contact's name, address, phone, and email information.

**Note:** If the contact is a registered user who will get access to the permit based on the contact type that you choose, then the email that you enter here must be the same email that the contact used when registering. If the emails do not match, the contact will not have access to the permit.

- c. Enter the following additional information:

Page Element	Description
<b>Primary</b>	Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.
<b>Contact Type</b>	<p>Select the role or position of the contact person relative to the current application. For example, a contact might be a property owner, a business owner, or a contractor.</p> <p>When you add contacts for a permit, pay close attention to whether the contact type grants the person access to the permit. You can see the <b>Permit Access Enabled</b> field when you prompt for the contact type and when you review the list of contacts on the main Contact page. This information doesn't appear in the context of non-permit applications.</p> <p>If the contact type allows permit access <i>and</i> the contact email matches the account email for a registered user, then that registered user can access the permit. For more information, see <i>Setting Up Contact Types</i>.</p>
<b>Business Name</b>	If the contact represents a business, enter the business name.

- d. Click **Save** to save the new contact and return to the Contacts page.

The Contacts page now includes the new contact in the **Additional Contacts** list.

9. To modify information about an application contact:
- a. Click the row for the contact.
  - b. On the Contact Details page, update the detail information.

If the contact is a profile contact, you can't modify the contact's name. If the contact exists only in this application, all the fields are available for edit.

- c. Click **Save** to save changes and return to the list of contacts.

10. To remove a contact from an application:

- a. Click the row for the contact.
- b. On the Contact Details page, click **Delete**.

Contacts who are profile contacts are not deleted from the system, they are only removed from the current application. Contacts that exist only in the current application are deleted entirely.

## Applying Conditions to Applications

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

### Viewing and Updating Conditions

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

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

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

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

This example illustrates the Conditions page.

Permit  
ZPER-FEN-2019-00009 PermitType13223146  
LCKLNP\_INSRESY1552426148430 All Conditions: 3

Conditions

Condition Name	Severity	Source	Applied Date	Display Message	Status	Priority	Resolved Date	Resolve
LCKLNP_INSRESY1552426148430	Lock		3/14/19	APP_Con_Lock_LNP_INS_RES_Y	Applied	High		Resolve
APP_HLD_11552425759063	Hold		3/14/19	APP_HLD_LNP_1	Applied	High		Resolve
NOTICE_2019-03-12728609596	Notice		3/14/19	NOTICE_CON_TST	Applied	High		Resolve

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

## Applying a Condition to a Transaction

You apply conditions to transactions on the Apply Condition page.

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

Page Element	Description
<b>Condition Name</b>	Select a condition from a list of conditions that are enabled in setup.
<b>Severity</b>   Lock	Displays the level of severity as defined while setting up the condition:  At the most severe level, the <i>Lock</i> condition suspends all operations, including workflow advancing, payment processing, inspection scheduling, and inspection results.
<b>Severity</b>   Hold	Agency staff can select which rules to apply to conditions with this level of severity.
<b>Severity</b>   Notice	This level functions as an alert and has no effect on operations.
<b>Business Rules</b>	Select one or more business rules. Options are: <ul style="list-style-type: none"> <li>○ Prevent New (applicable only to person, parcel, and address conditions)</li> <li>○ Prevent Workflow Advancing</li> <li>○ Prevent Issue or Final</li> <li>○ Restrict Payment</li> <li>○ Prevent Inspection Schedule</li> <li>○ Prevent Inspection Result</li> </ul> <p><b>Note:</b> The business rules available for selection are based on the severity of the condition you have selected. For example, for a condition whose severity is Hold you must select at least one business rule, and for a condition with Lock severity, all the business rules are automatically applied.</p> <p>Additionally, among these business rules, <i>Prevent New</i> alone is applicable to the address condition.</p>

Page Element	Description
	For more details on the business rules, see <a href="#">Setting Up Conditions</a> .
<b>Additional Information</b>	Enter additional information regarding the condition applied to the transaction.
<b>Display Message</b>	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 <b>All Conditions</b> link.
<b>Priority</b>	Select a priority from options High, Medium, and Low.
<b>Description</b>	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.
<b>Applied By</b>	Displays in view mode, the name of the user who applied the condition, or as <b>System</b> if the condition is inherited.
<b>Applied Date</b>	Displays in view mode, the date on which the condition was applied.

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

## Resolving a Condition

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

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

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

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

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

## Viewing a Resolved Condition

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

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

- Applied By
  - Resolution Action
  - Resolved By
  - Resolved Date
4. Click **Cancel** to return to the Conditions page.

## Working with Attachments

You view a list of files and upload or download documents associated with a transaction, such as a permit, planning application, case, or business license on the Attachments page.

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

You can manage attachments associated with a transaction on different pages in Oracle Public Sector Compliance and Regulation. Here's a look at some of the areas that include attachment functionality:

- The Attachments page in the transaction detail pages, including pages for permits, planning applications, cases, and business licenses.
- The Workflow page in the transaction detail pages.
- Inspection Detail and Checklist pages in Oracle Inspector.
- New Violation and Inspection pages in Oracle Municipal Code Officer.

Recipients of transaction communications containing web forms can upload files when requested. You can also manage documents as part of the plan review process.

These are all sources of attachments that you'll find associated with a transaction on the Attachments page.

For more information about managing attachments for a workflow task, see [Using Workflow](#).

For more information about attachments in Oracle Inspector, see [Overview of Mobile Oracle Inspector for Permits](#).

For more information about Oracle Municipal Code Officer, see [Overview of Mobile Oracle Municipal Code Officer](#).

## Viewing Attachments

To view a list of attachments:

1. Access the detail page for the transaction where you want to view attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

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

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

Page Element	Description
<b>File Name</b>	<p>View the following information in the <b>Filename</b> field:</p> <ul style="list-style-type: none"> <li>○ Icon indicating the file type</li> <li>○ Filename with file type extension</li> <li>○ <i>File Size</i></li> </ul>
<b>Description</b>	<p>View the description of the attachment as entered by the person who added the attachment.</p>
<b>Source</b>	<p>View the source of the attached file. Valid values are:</p> <ul style="list-style-type: none"> <li>○ <i>Permits</i></li> <li>○ <i>Inspection</i></li> <li>○ <i>Workflow</i></li> <li>○ <i>Plan Reviews</i></li> </ul> <p>Attachments that are added to electronic plan reviews have their source changed from <i>Permits</i> to <i>Plan Reviews</i>. For example, attachments added through Oracle Inspector display <i>Inspection</i> in this field.</p> <p>Attachments added to web form questionnaire responses display <i>Permits</i> in this field.</p> <p><b>Note:</b> This column appears only on the All tab for permits.</p>
<b>Uploaded By</b>	<p>View the name of the person who uploaded the file along with the date and time that the person uploaded the file.</p>
<b>Category</b>	<p>View the document category for the attachment.</p> <p>The category is available when a document group is specified during setup for the transaction type.</p> <p><b>Note:</b> This field is not available for case and business license attachments.</p>
<b>Actions</b>	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> <li>○ <i>View Details</i></li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Download</i></li> <li>○ <i>Delete</i></li> </ul> <p><b>Note:</b> For permits, the <i>Delete</i> action appears only on the Permits tab. Additionally, the security associated with your user ID may limit which actions are available to you.</p>

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

## Adding Attachments

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

To add attachments:

1. Access the detail page for the transaction where you want to add attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. Click the **Add** icon.

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

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

The filename appears on the Add Attachments page.

5. On the Add Attachments page, optionally enter a description of the file.
6. If the **Category** and **Subcategory** fields appear on the Add Attachment page, optionally select a document category and subcategory.

These fields appear if the transaction type is associated with a document group. The document group defines the available values in these fields.

For more information, see the implementation documentation for [Setting Up Document Categories and Subcategories](#).

**Note:** The document group for a transaction is based on the document group that was defined for the transaction type at the time the transaction is saved.

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

7. Click the **Upload** button.

The Add Attachment window closes, and the newly uploaded attachment appears on the Attachments page.

## Viewing Attachment Details

To view document details on the Attachments details page:

1. Access the detail page for the transaction where you want to view attachment details.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. In the attachments grid, click the **Action** icon for the document that you want to view.
4. Select *View Details* to open the document details page.

The details on this page include the information from the Attachments page and information about the file size and the person who last updated the document information.

Editable fields include the description and, if available, the document category and subcategory.

## Downloading Attachments

To download an attachment from the Attachments page:

1. Access the detail page for the transaction where you want to download attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

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

## Deleting Attachments

There are multiple ways to delete attachments. The security associated with your user ID determines whether you can delete attachments.

**Note:** For permits, you can delete attachments only from the Permits tab of the Attachments page.

To delete selected attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. Click the **Edit** icon above the grid.
4. Select one or more documents to delete.
5. Click the **Delete** icon.

To delete a single attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. In the attachments grid, click the **Action** icon for the document you want to delete.
4. Select *Delete* from the action menu.

## Working with Comments

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

### Adding Comments

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

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

### Viewing and Editing Comments

1. Access the detail page for the transaction, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.  
You view a list of comments in the right panel. If more information exists for a comment, click the **More** link to show the complete detail of the comment. Use the **Less** link to shrink the comment area back to its original size.
3. You can edit, delete, or hide a comment from public view only if it was entered by you. Click the specific comment row to open the detail view and make changes.
4. Click **Save**.

### Adding a New Comment

1. Access the detail page for the transaction, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.
3. Click the **Add Comment** button to open the Add Comment page and enter a new comment. You can use the **Rich Text Editor** option for formatting your comment with tools such as the numbered list. The Link button allows you to embed a URL to a display text you enter. See *Managing Comments* to enable the option of **Rich Text Editor** formatting.
4. Click **Post** to post the comment and return to the Comments page.

### Adding Favorite, Standard, and Recent Comments

1. You can post a comment that is already available in the system. On the Add Comment page, click the **Select Comments** button to view the three categories of comments:
  - *Favorite*: Comments that you have marked as favorite.
  - *Standard*: All the predefined comments available.
  - *Recent*: Comments that were recently posted.
2. Select a comment and click the **Insert** button to post the comment.

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

See *Managing Comments*.

## Working with Fees and Payments

You view fees and payments associated with a submitted business license, permit, or planning application on the Fees and Payments page in the application details. You can also adjust, refund, and pay fees, as well as add fees manually and calculate additional fees.

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

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

Fees shown on this page are calculated based on the application form and fee schedule mapping sources.

### Viewing Fees and Payments for an Application

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

Page Element	Description
<b>Fee Description</b>	The description of the fee as defined when creating a fee item.
<b>Amount</b>	The amount due for each fee.
<b>Currency</b>	The currency in which the transaction is paid.
<b>Status</b>	<ul style="list-style-type: none"> <li>○ <i>Canceled</i>: Indicates the fee payment is no longer required.</li> <li>○ <i>Pending</i>: Indicates the fee is pending the agency's finalization. The fee may or may not become due.</li> <li>○ <i>Hold</i>: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved.</li> <li>○ <i>Due</i>: Indicates the current fee request is due and needs to be paid.</li> <li>○ <i>Refund Pending</i>: Indicates that a refund was submitted for processing and approval.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Refunded</i>: Indicates the fee was reversed and a refund was issued.</li> </ul>
<b>Department</b>	The department within the agency requiring the payment.
<b>Assessed Date</b>	The date the request for payment was issued.
<b>Payment Date</b>	The date payment was received.
<b>Payment Reference</b>	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
<b>Invoice</b>	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
<b>Total Fees</b>	The total amount of fees that may be applicable to the application.
<b>Total Payable</b>	<p>The amount of fees that are designated as payable.</p> <p>The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.</p>
<b>Total Paid</b>	The amount of the total fees already collected.
<b>Balance Due</b>	The remaining portion of the fees yet to be collected.
<b>Pay</b>	<p>Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment.</p> <p>If you want to make a partial payment, deselect the <i>Select All</i> check box to clear the check boxes for all the fee items and then select individual items. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p>

## Adding Ad Hoc Fees

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

When the fee status changes to *Due*, the system sends a notification to the applicant that new fees have been assessed and are due.

To manually add a fee:

1. Click **Add Fees** on the Fees and Payments page. This button is only available to agency staff who have appropriate permissions.
2. On the Fee Item Details page, you can choose to manually add an ad hoc fee or use the fee calculator to calculate fees according to a fee schedule. To manually enter a fee, select the Add Fees tab.
3. Select a fee item.
4. Enter the fee required for the item in the **Amount** field.
5. Set the status of the fee in the **Status** drop-down list, such as *Due*, *Canceled*, *Hold*, or *Pending*.

When a fee with a *Due* status is added or a the fee status is changed to *Due*, the system sends notifications or alerts, as configured by your agency.

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

## Calculating Additional Fees

Use the fee calculator when you want to calculate additional fees for an application after submission. The fee calculator enables you to enter information for the calculation based on a fee schedule. After the fees are calculated, you can select the fee items you want to add to the application.

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

Let's walk through how to use the fee calculator:

1. Click **Add Fees** on the Fees and Payments page. This button is only available to agency staff who have appropriate permissions.
2. On the Fee Item Details page, you can choose to manually add an ad hoc fee or use the fee calculator to calculate fees according to a fee schedule. To use the fee calculator, select the **Calculate Fees** tab.
3. Select a fee schedule. If a fee schedule is already associated with the transaction type, the fee schedule name appears as the default value, but you can select a different fee schedule as well.
4. Based on the fee structure you choose, you'll see fields that are relevant to the fees. Enter the requested values.
5. Click **Calculate Fees**.
6. On the Add Fees page, you'll see the calculated amounts and department for each fee item. If you want to add the calculated fee to the fees due for the application, select the fee and click **Add Selected**.

The fee item appears in the fees list with a *Pending* status.

## Adjusting Fees

Agency staff with appropriate permissions can correct or adjust fees as needed after the application is submitted. For example, if the applicant added 6 solar panels instead of 2, the required permit fees might increase. After you update the information that was submitted during intake in the application details, you can recalculate the total fees due

based on the fee schedule for the application type. The recalculation corrects the fees by either generating a new fee or changing the amount.

Here's how you can adjust the fees for an application:

1. On the Application Details page for the application, click **Edit**.
2. Make changes as needed and click **Done**.
3. On the Fees and Payments page, click **Recalculate**.

The difference in fees compared to the original fee or the new fee appears as a separate line in the fee list. The fee totals for the application are also updated. If no adjustments are required, the displayed fees remain the same. Fee adjustments that result in a negative amount can be processed as a refund request.

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

## Paying Fees

To add a payment for fees that are due, click the **Pay** button. You have the choice of paying some or all of the fees. After you select the fees that you want to pay, you can select the payment method on the Checkout page.

**Note:** Applicants are not allowed to make partial payments. They must submit a request and the agency staff can make the partial payment on behalf of the applicant. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.

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

## Refunding Fees

Agency cashiers and application administrators can process full or partial refunds of permit, planning application, and business license fee items online.

Here's how to refund permit fees:

1. Select one or more fee items.  
You can only select fees that have been paid.
2. Click **Initiate Refund**.
3. Review the fee amount and refund method. If you're processing a partial refund, enter the refund amount.
4. You must enter a refund reason before you submit the refund request.
5. Click **Process Refund** to reverse or partially reverse the fee.

After you submit the refund request, the status changes to *Refund Pending* and the refund moves into a queue to be approved. When you submit the request, you'll see updated fee totals for the application. Once approved, the refunded amount appears as a new line in the list of payment items with a *Refunded* status.

For debit or credit, the system issues the refund using the method used for payment, while distribution for other payment methods is by manual check or other external system.

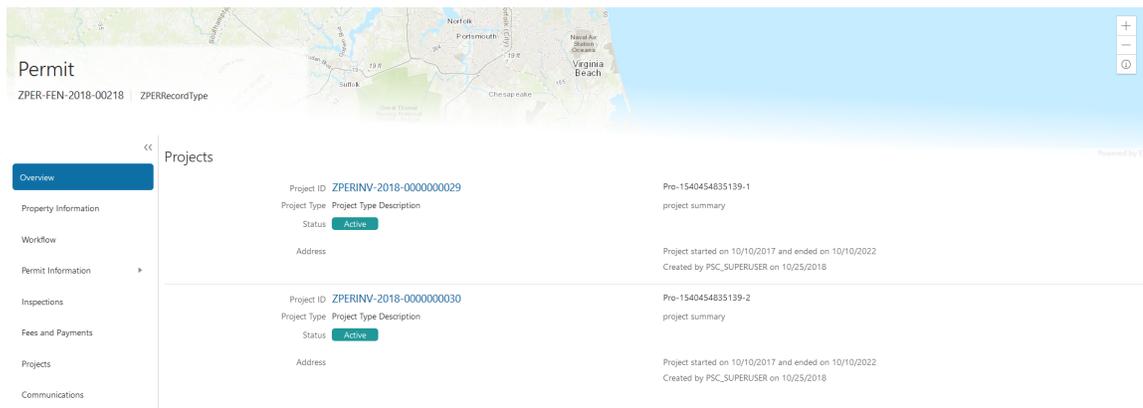
For more information about the refund approval process, see [Viewing and Processing Refunds](#).

## Viewing Project Summaries

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

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

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



## Viewing the Project Summary

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

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

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

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

Page Elements	Description
<b>Project ID</b>	Click the project ID link to access the projects page that was created by agency staff. The project ID is automatically generated after saving the project.
<b>Project Type</b>	Review the project type. A project type is based on the nature of the project and is set up during implementation, for example, Commercial Project or Residential Project.

Page Elements	Description
Status	Review the status of the project. For example, <i>Active</i> , <i>Canceled</i> , <i>On Hold</i> , <i>Inactive</i> , or <i>Completed</i> .
Address	Review the address of the project.
Project Name	Review the name of the project.
Project Summary	Review a summary of the project. The summary can be a long description of the project, as entered by the agency staff.
Project Start Date and Project End Date	Review the start and end dates.
Project Created By	Review the name of the person who created the project.

#### Related Topics

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

## Working with Application Communications

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

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

### Sending Application Communications

1. Click **Business License Transactions, Permits**, or **Planning Applications** on the Agency Springboard.  
Select an application on the Transactions page.  
Click Communications in the navigation bar.
2. On the Communication Details page, click **Add**.

Agency planners can send their application communication from the My Applications tab. Click the **Planner Worklist** tile on the Agency Springboard and they click the My Applications tab. For the application that you want to send an ad hoc message, click the **Actions** menu and select **Send Message**.

3. On the Ad Hoc Message page, enter values for the following fields:

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

Page Elements	Definition
	<p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p><b>Select and Insert</b></p>	<p>These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Status</i> attribute, and click <b>Insert</b>, the <code>{Status}</code> variable is inserted into the <b>Message Body</b> field of the message. When you send this message, the status of the application associated with the message is included in the body text.</p>
<p><b>Create Web Form</b></p>	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
<p><b>Insert Web Form</b></p>	<p>Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
<p><b>From</b></p>	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p><b>Note:</b> Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Alert</i>, <i>Emails and Notifications</i>, and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
<p><b>To</b></p>	<p>Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message.</p> <p><b>Note:</b> Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p>
<p><b>Cc and Bcc</b></p>	<p>Enter the email addresses of the people or organizations that you want to receive a copy of the message.</p>

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

4. Click **Send**.

## Communicating Using a Web Form

You can create and send emails or notifications that contain an online form with questions for the applicant or other agency staff. The correspondence contains a link that the recipient can use to access and respond to the questionnaire.

Here's how to create a web form:

1. On the Communication Details page, click **Add**.
2. Enter values for the channel type, such as email or notification, visibility to send to the applicant or agency staff, and the **To**, **From**, and **Subject** fields.
3. Click **Create Web Form**.
4. 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. You can select from these answer types:

Answer Type	Description
<i>Attachment</i>	<p>Enables the recipient to attach one file per question.</p> <p>After the recipient uploads the file and submits the form, attachments are available in the web form response and on the Attachments page for the application.</p>
<i>Date</i>	Enables the recipient to answer the question using a calendar to indicate the date.
<i>Text</i>	Enables the recipient to enter text in response to a question.

Answer Type	Description
<i>Number</i>	Enables the recipient to enter a numerical value of up to 13 digits and three decimal places.

5. 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.
6. Click **Insert Web Form** to insert the web form questions into the body of your message.
7. Click **Send**.

After you receive the communication, you click the link in the message to open the online web form and answer the questions or upload a file. After you submit the form, the response appears on the Communication Details page and attachments are also listed on the Attachments page.

## Viewing Application Communications

The Communication Details page displays a list of all messages that are associated with the application, including emails, notifications, texts, and web form responses.

1. Click **Business License Transactions, Permits, or Planning Applications** on the Agency Springboard.

Select an application on the Transactions page.

Click Communications in the navigation bar.

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

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

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

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

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

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

## Working with Ad Hoc Communications

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

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

Alerts appear as text in the banner of the Agency Springboard or the landing pages for all anonymous, all registered users, or individual users. Emails are messages sent to recipients and accessed through an email client. Notifications appear when registered users click the notification icon in the global header at the top of the page. Short message

service (SMS) text messages are electronic messages sent to user mobile numbers over a cellular network or through an internet connection.

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

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

Alert setup using the delivered PSC\_GENERIC\_ALERT event is also available. For step-by-step instructions for setting up alerts using the delivered events, see *Defining Alerts*.

## Adding Ad Hoc Alerts

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

Page Element	Description
Reference Name	Enter a unique name for the alert.
Start Date Time and End Date Time	Enter the date and time when the alert starts and stops displaying.
Enabled	Turn on the switch to activate the alert.
To	<p>Enter a value for the target recipients of the alert:</p> <ul style="list-style-type: none"> <li>○ Individual Registered Users Enter comma-separated user IDs for the registered users, for example, <b>SYSTEM_ADMIN, BUSINESS_ANALYST</b>.</li> <li>○ All Registered Users Enter this attribute: <b>#{User}</b>. The application displays the alert when the registered user logs in.</li> <li>○ All Anonymous Users Enter this attribute: <b>#{Anonymous}</b>.</li> <li>○ A Combination of Users Enter a string including comma-separated user IDs for the registered users, <b>#{User}</b> for all registered users, and <b>#{Anonymous}</b> for all anonymous users.</li> </ul>
Message Body	Enter the main body of the alert using plain, unformatted text.

Page Element	Description
<b>Select and Insert</b>	<p>These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current Date</i> attribute, and click <b>Insert</b>, the <code>#{Current Date}</code> variable is inserted into the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p>
<b>Remarks</b>	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

## Modifying Ad Hoc Alerts

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

## Deleting Ad Hoc Alerts

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

## Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
<b>Channel Type</b>	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> <li>○ <i>Notification</i>: Generates a notification that appears when users click the <b>Notifications</b> button in the header at the top of the page in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service.</li> </ul>

Page Elements	Definition
	<p><b>Note:</b> The fields that are available to define on this page vary depending on the channel type that you select.</p>
<b>Visibility</b>	<p>Select which type of user can see this message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Account owner</i></li> <li>○ <i>Agency staff only</i></li> </ul>
<b>MIME Type</b> (Multipurpose Internet Mail Extensions type)	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>HTML</i></li> <li>○ <i>Text</i></li> </ul> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<b>Priority</b>	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<b>User Can Delete</b>	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<b>Reference</b>	<p>Enter a unique alphanumeric reference for the communication.</p>
<b>Select and Insert</b>	<p>These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current Date</i> attribute, and click <b>Insert</b>, the <code>{Current Date}</code> variable is inserted into the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p>

Page Elements	Definition
<p><b>From</b></p>	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p><b>Note:</b> Enter email addresses in the <b>Email Attributes</b> section for the <i>Email</i> and <i>Emails and Notifications</i> channel types; user IDs in the <b>Notification Attributes</b> section for the <i>Alert</i>, <i>Emails and Notifications</i>, and <i>Notification</i> channel types; and phone numbers in the <b>Compose</b> section for the <i>Text</i> channel type.</p>
<p><b>To</b></p>	<p>Enter a value for the target recipients of the message.</p> <p>For notifications, enter comma-separated user IDs for the registered users, for example, <b>SYSTEM_ADMIN,BUSINESS_ANALYST</b>.</p> <p>For emails, enter comma-separated email addresses for the recipients, for example, <b>john.doe@example.com</b>.</p>
<p><b>Cc and Bcc</b></p>	<p>Enter the email addresses of the people or organizations that you want to receive a copy or a blind copy of the message.</p> <p><b>Note:</b> These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<p><b>Subject</b></p>	<p>Enter a brief description of the purpose and content of the message.</p> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<p><b>Message Body</b></p>	<p>Enter the main body text of the message.</p> <p>For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> MIME type, you can enter only plain, unformatted text.</p> <p>For the <i>HTML</i> MIME type, you can enter rich text, links, and images.</p>

4. Click **Send**.

## Viewing Ad Hoc Emails, Notifications, and Texts

1. Select **Communication Center** on the Agency Springboard.
2. For each row on the **Emails, Notifications, and Texts** tab of the Communication Center page you can:
  - o Click the **Actions** icon to resend or forward the message.  
Select the **Resend** action to access the message in the Message Details modal page in display-only mode. Click **Resend** to send the message another time to the same list of recipients.  
Select the **Forward** action to access the message in the Message Details modal page. Enter new recipients, update the message if necessary, and click **Forward** to send the updated message to the new recipients.
  - o Click the **View More Details** button to view detailed information about the message.

## Viewing Application Status History

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

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

## Reviewing the Status History

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

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

Page Element	Description

*Related Topics*

- [Setting Up Transaction Statuses](#)

## Working with Related Transactions

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

### Adding a Related Transaction

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

To link a permit or planning application to a transaction:

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

The Related Transactions page now lists the new transaction rows, each with a link to access the linked related transaction application.

### Removing a Related Transaction Link

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

To remove an application link:

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

# 5 Working with Expiration

## Expiration Overview

This topic describes expiration rules, including the types of rules that can be applied to the different types of transactions and the batch process that updates expiration statuses for transactions.

### Expiration Rules

Your agency defines expiration rules that determine the expiration dates for permits, planning applications, and business licenses. The expirations apply to different phases of the permit, planning application, or business license lifecycle. The system calculates expiration dates based on transaction statuses, or for business licenses with a fixed date expiration rule, a specified date. The rules can include grace periods, which provide extra time beyond the expiration date for the user to take action. The rules also can include extensions for permits and planning applications, which provide a way for you to add time to the expiration timeframe. Note that pending inactive applications can't be extended.

For information about expiration rules, see [Setting Up Business License Expiration Rules](#), [Setting Up Permit Expiration Rules](#), and [Setting Up Planning Application Expiration Rules](#).

### Business License Expiration Dates

You can set up expiration rules for business licenses to define:

- When an inactive pending application expires.  
The expiration timeframe begins when the applicant saves a business license application and ends when the application is submitted.
- When the business license expires based on either a fixed date or when the license was issued.

For example, a city requires a business license for a sidewalk café and sets up the rules like this: The business starts an application and has 30 days to submit it to the city. Then the business license is valid for 60 days from when the license was issued. Alternately, the city could set up the expiration dates to occur at regular intervals, such as monthly, quarterly, or yearly, for example.

### Business License Consultation Expiration Dates

You can set up expiration rules for business license consultations to define:

- When an inactive pending application expires.  
The expiration timeframe begins when the applicant saves a consultation application and ends when the application is submitted.
- When the consultation recommendations expire and the business must submit a business license application.

For example, the agency can require businesses to submit their application for a business license consultation within 14 days of starting the application. Once the consultation is complete, the business has another year to roll the recommendations over into a business license application.

## Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

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

- When the application expires.

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

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

- When the permit expires.

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

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

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

## Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

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

- When the entitlement expires.

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

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

## Pre-Application Expiration Dates

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.

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

- When the pre-application expires.

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

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

## Processing Expiration Status

You can view the latest expiration statuses in the details of an individual transaction, or in the list of transactions. To change the status to *About to expire* or *Expired*, your agency must run batch update expiration processing. Processing runs against transactions with transaction types for which an expiration rule was defined.

Here's an example of how the processing works: An agency created a rule for solar permits that indicates pending applications expire in 30 days. The rule indicates that the permit is about to expire 5 days before the expiration date. When the pending application is inactive for 25 days, the application is about to expire, and at 30 days, the application expires. When expiration processing runs, the system updates the expiration dates for pending solar permit applications to indicate that the application is about to expire and when it expired and sends out communications based on the updated status and the rule. If the rule includes a grace period, such as 3 days, the system status changes to expired after 33 days of inactivity.

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

You must periodically run batch expiration rule processing to update the about to expire and expired statuses after setting up communication rules. The system updates the statuses and sends out the communications according to the setup.

For information about how to process expiration statuses, see [Updating Application Expiration Status](#).

## Working with Application Expiration

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

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

### Viewing the Expiration Dates

Here's how you can view expiration dates:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. On the Transactions list page, you see the list of permit or planning applications for the agency.

Click **Sort By** and select *Expiration Date* to view the applications sorted by expiration date. You can also use **Filter By** to filter the results based on expiration date.

Here's an example of what you would see on the Transactions page: If the expiration rule is set up to show that the pending application is about to expire in 5 days due to inactivity, the expiration date displays *Expires in 5 days on <date>* before the application expires. When the application expires, you'll see *Expired on <date>*.

3. To view the expiration on the Overview page of the application, click the row for the application on the Transactions list page. You'll see the date next to the **Expiration Date** field and the status, such as *About to expire* or *Expired* in the **Status** field.

## Extending Expiration Dates

Depending on the rules created for an application type, you can manually extend the deadlines for an application. When one or more extensions are possible, the **Extend** link is available for you to enter a new expiration date. You must have appropriate permissions associated with your role to manually extend a permit. The link is available during the period when the application is about to expire and also during the grace period.

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

Depending on expiration rules setup, permits can also be extended automatically based on inspection activity. Both manual and automatic extensions count toward the number of extensions allowed. For information about setting up automatic extensions as well as the number of extensions allowed, see [Setting Up Permit Expiration Rules](#).

### Related Topics

- [Expiration Overview](#)
- [Updating Application Expiration Status](#)

## Updating Application Expiration Status

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

You run the process that updates expiration statuses on the Process Expiration Rules page, which you access by selecting **Common > Process Expiration Rules**. Oracle recommends that you schedule expiration rules processing to run daily.

**Note:** After setting up expiration rules, you must periodically run batch expiration rule processing to update the *About to Expire* and *Expired* statuses. The system updates the statuses and sends out communications according to the setup.

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

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

## Entering Parameters to Process Expiration Rules

1. Access the Parameters tab on the Process Expiration Rules page.

2. Select the **Classification** for which you are updating expiration dates: *Planning and Zoning* or *Permits*.

## Scheduling the Process

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

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

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

## Setting Up Process Notifications

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

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

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

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

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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



# 6 Recording and Billing Time

## Adding Time Entries

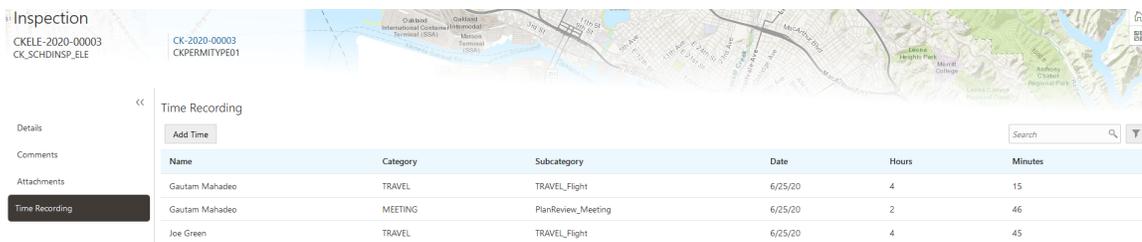
Agency staff can record the time that they spend working on transactions for the purposes of billing and reporting.

**Tip:** You can access time entry on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using.

## Accessing Time Entry

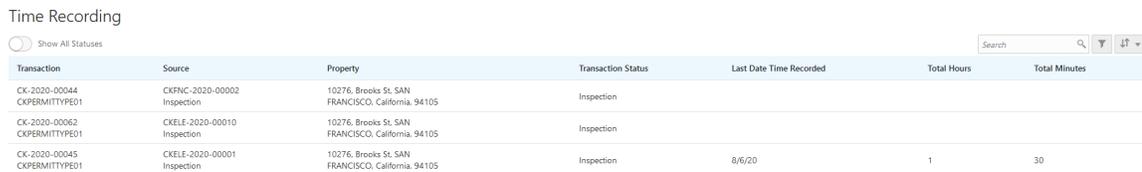
You add time entries directly on the respective pages for the transaction you are working on. For example, you can enter the time you spend working on a permit inspection using the Time Recording page of the inspection details.

This is an example of the Time Recording page for an inspection



Additionally, you can quickly access transactions using the **Time Recording** tile on the Agency Springboard. This page displays transactions that you are assigned to or that you have already recorded time against.

This is an example of the Time Recording page accessed from the Agency Springboard



By default, this page displays only your current transactions. For example, it won't display expired permit inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions assigned to you regardless of status.

Click a row to access the transaction page where you can enter your time.

## Adding a Time Entry

1. Access the transaction that you want to add time for.
2. Click **Add Time**.

This is an example of the Time Details page

The screenshot shows the 'Time Details' form with the following values:

- Name: Chanel Caudy
- Date: 8/6/20
- Time Type Code: INSP\_BAO
- Category: TRAVEL
- Subcategory: Flight
- Hours: 3
- Minutes: 30
- Billable:
- Comments: Flight time to inspection location.

3. On the Time Details page, enter values for the following fields:

Page Element	Description
<b>Name</b>	Staff who have the ability to enter time for others, such as billing supervisors, can select any agency staff member in this field. All other agency staff automatically have their name populated in this field and can't change it.
<b>Date</b>	Select the date that you're entering time for. The current date is the default value.
<b>Time Type Code</b>	Enter the time entry type code that you want to use. The page displays the category and subcategory associated with the code that you select. The time entry type code also determines the default values of the <b>Billable</b> and <b>Assess Now</b> switches on this page and whether those default values can be changed.  For more information on time entry types, see <a href="#">Setting Up Time Entry Types</a> .
<b>Hours and Minutes</b>	Enter the amount of time you spent on the transaction in hours and minutes. You can select 0 to 23 in the <b>Hours</b> field and 0 to 59 in the <b>Minutes</b> field.
<b>Billable</b>	Use this switch to indicate whether the time is billable. Whether this switch is turned on by default or can be overridden is determined by the time entry type that you select.
<b>Assess Now</b>	Use this switch to indicate whether the fees associated with this time entry are assessed immediately when you save it.

Page Element	Description
	<b>Note:</b> This switch appears only for staff who have the ability to enter time for others. It is disabled when the Billable switch is turned off.
<b>Comments</b>	Enter any additional information you want to record for the time entry.

4. Click **Save**.

## Modifying a Time Entry

**Note:** Agency staff with permission to assess fees can modify or delete a time entry until the fees associated with it have been paid. They can add or update comments for a time entry until its associated transaction reaches terminal status such as *Completed* or *Denied*. Staff without permission to assess fees can no longer modify or delete a time entry once fees have been assessed for it.

1. Click a time entry row.
2. On the Time Details page you can:
  - o Edit the time entry fields.
  - o Delete the time entry. You will be prompted to confirm the permanent deletion.
3. Click **Save**.

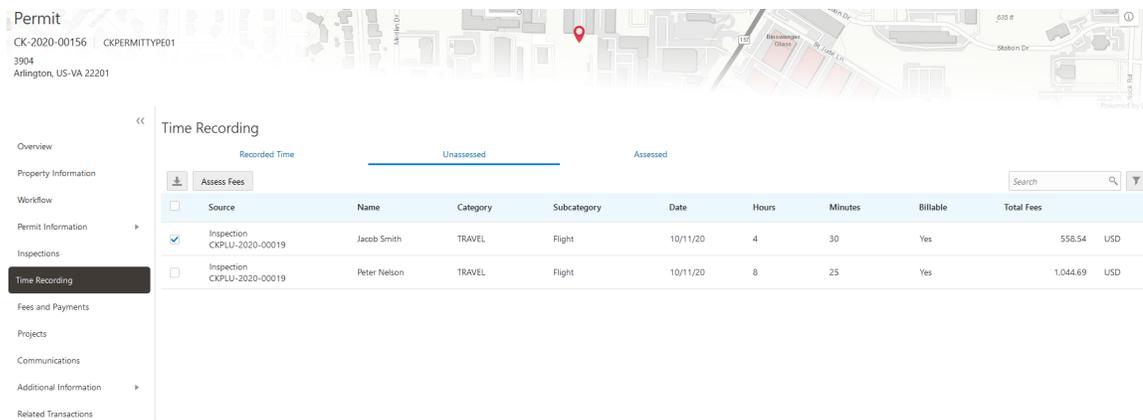
## Assessing Fees for Time Entries

Agencies can bill for time spent by their staff working on transactions.

Fees are automatically calculated when time is recorded. Time entries with the **Assess Now** switch turned on are immediately assessed when they're saved and appear in the Fees and Payments page for the transaction. If the switch is turned off, an agency staff member must assess the fee explicitly.

You assess fees on the Time Recording page for a transaction.

This is an example of the Time Recording page for a permit



This page has three tabs:

- The Recorded Time tab displays all recorded time entries for the transaction.
- The Unassessed tab displays all time entries for which fees have not yet been assessed.
- The Assessed tab displays time entries for which fees have already been assessed.

## Assessing Fees for Time Entries

1. Access the Unassessed tab of the Time Recording page.
2. Select the check box next to each time entry you want to assess.
3. Click **Assess Fees**.

The application moves the selected time entries from the Unassessed tab to the Assessed tab, and creates a fee for each fee item associated with each assessed time entry on the Fees and Payments page.

For more information on the Fees and Payments page, see [Working with Fees and Payments](#)

**Note:** Even after a fee is assessed for a time entry, agency staff with permission to assess fees can modify it until one or more of the fees associated with the time entry has been paid.

## Accessing Unassessed Time Fees from the Agency Springboard

You can quickly access transactions with unassessed fees using the **Unassessed Time Fees** tile on the Agency Springboard.

This example shows the Unassessed Time Fees page

Unassessed Time Fees

Show All Statuses

Transaction	Property	Status	Fees
CK-2020-00068 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	3250.36 USD
CK-2020-00045 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	371.00 USD
CK-2020-00138 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	1077.34 USD
CK-2020-00136 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	3212.34 USD

By default, this page displays only current transactions with unassessed fees. For example, it won't display permits with expired inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions with unassessed fees.

**Note:** Time entries with calculated fees of zero do not appear on this page.

Click a row to access the Unassessed tab of the Time Recording page.



# 7 Managing Manual Plan Reviews

## Manual Plan Review Process Flow

Some projects require a plan review to evaluate them.

Manual plan reviews are tracked as part of permitting and planning application workflow, but are performed without the use of integrated electronic document review software. Manual plan reviews are created for transactions when the **Plan Review Type** is set to *Manual* for the associated transaction type. For more information see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

**Note:** Electronic plan reviews are performed through integration with electronic document review software. For more information on electronic plan reviews, see [Managing Electronic Plan Review Cycles](#).

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

1. A registered public user submits a permit or planning application with attached documents that require review by agency staff.
2. A permit technician or assigned planner assigns a status to the transaction that requires a plan review. This triggers the automatic creation of the first plan review cycle. For more information, see [Using Workflow](#).
3. The plan coordinator assigns reviewers to the plan review cycle. See [Managing Manual Plan Review Cycles](#).
4. The assigned plan reviewers complete their review. See [Performing Manual Plan Reviews](#).
5. Add new plan review cycles and repeat the review process as necessary until the review is complete.

## Managing Manual Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a series of plan reviews completed by multiple reviewers.

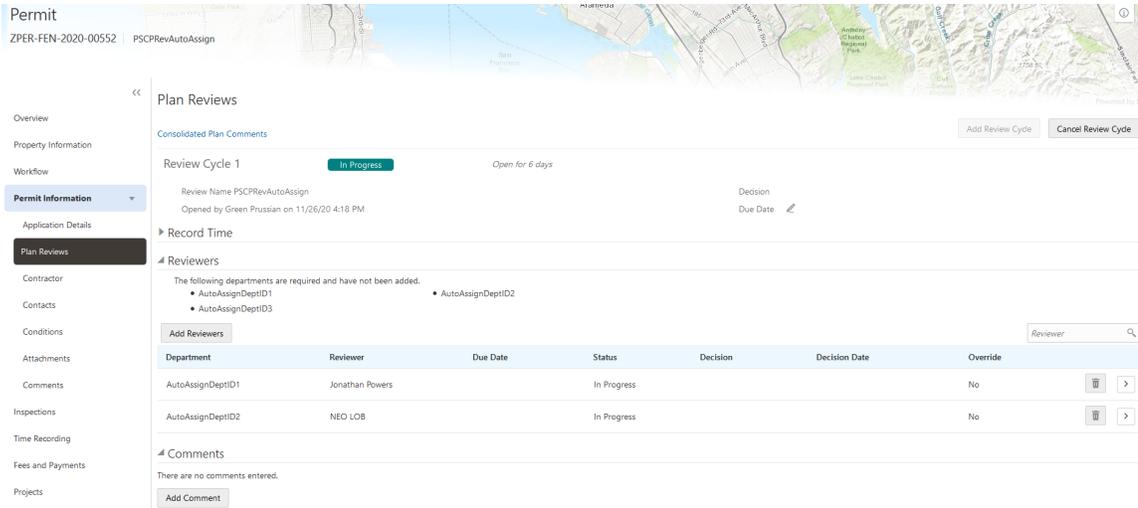
As a plan coordinator, you perform these review cycle tasks on the Plan Reviews page:

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

To access the Plan Reviews page for a transaction:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.

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



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

## Manual Plan Review Cycle Workflow

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

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

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

You can configure the Business Rules Framework to trigger the generation of a communication to designated users when a review cycle is completed or canceled. For example, the completion of a review cycle can send a notification to the plan coordinator. For more information, see [Business Rules Framework Overview](#) and [Setting Up Business Rules](#).

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

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

## Adding Manual Plan Review Cycles

The first cycle of a plan review is automatically created when a permit technician or assigned planner puts the transaction into *Plan Review* status. You add subsequent cycles until the plan review is complete.

1. On the Plan Reviews page, click the **Add Review Cycle** button to add a new plan review cycle.

This button is available only when all other plan review cycles for the transaction are complete or canceled.

2. The default review cycle name is the name of the previous cycle, but you can enter a different cycle name on the Add Plan Review page.
3. Select the check box on the Add Plan Review page if you want to copy the reviewers from the most recent review cycle.
4. Click the **Add** button.

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

If you want to add a due date for the plan review cycle, click **Edit** next to the **Due Date** field and select a due date.

## Canceling Manual Plan Review Cycles

On the Plan Reviews page, click the **Cancel Review Cycle** button to cancel a plan review cycle that is active. This button is available only when the plan review cycle has a status of *In Progress*.

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

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

## Recording Time for Plan Reviews

Agency staff can use the Record Time section to record the time they spend on their plan reviews. For more information, see [Adding Time Entries](#).

**Note:** Time recording is currently available only for permit plan reviews. It will be available for planning application plan reviews in a future release.

## Accessing Conditions of Approval for Planning Applications

Click the **Conditions of Approval** link on the Plan Review page to access the Conditions of Approval page for the planning application. This link is available only for planning applications. For more information on conditions of approval see [Working with Conditions of Approval](#).

## Adding Reviewers to Manual Plan Reviews

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

If the transaction type associated with the transaction includes required plan review departments, those departments are displayed at the top of the Reviewers grid. Once a reviewer from a required department is added to the plan review cycle, that department no longer appears.

If **Enable Auto Assignment** is turned on for the transaction type, a reviewer row is automatically added to the plan review cycle for each required plan reviewer department selected for the transaction type. Additionally, the department lead for each department is automatically assigned as the reviewer. For more information, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

1. On the Plan Review page, click the **Add Reviewers** button.

The Add Reviewers modal page displays a list of available reviewers by plan reviewer department. For more information on plan reviewer departments, see *Setting Up Plan Reviewer Departments*.

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

2. Select the check box next to each reviewer that you want to add.
3. Click **Save**.

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

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

## Removing Reviewers from Manual Plan Reviews

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

In the Reviewers grid, click the **Delete** button for a reviewer. You can remove reviewers when:

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

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

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

## Viewing the Different Plan Review Cycles

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

1. Click the **Switch Cycle** link in the plan review header details.

This link is available only when there are two or more plan review cycles.

2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

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

## Adding Comments for a Review Cycle

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

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

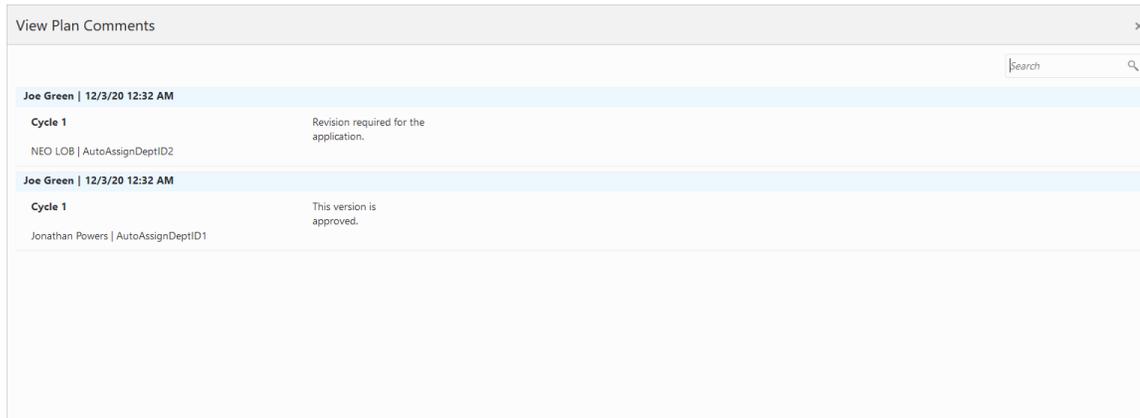
All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or permit is closed or canceled.

## Viewing All Plan Review Comments

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

Click the **Consolidated Plan Comments** link.

This example shows the View Plan Comments page.



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

## Performing Manual Plan Reviews

Plan reviewers perform reviews of documents.

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

This example shows the Plan Reviewer Decision Details page.

**Plan Review Decision Details**

---

**Reviewer Details**

Assigned Date: 2/19/20 12:04 AM      Last Updated Date: 2/19/20 12:04 AM  
 Assigned By: Joe Green      Last Updated By: Joe Green  
 Review Status: In Progress      Due Date: 2/26/20

---

**Reviewer Decision**

Reviewer: Jonathan Powers      Decision:   
 Decision Date:

---

**Override Reviewer Decision**

Override By:       Override Decision:   
 Override Date:

---

**Comments**

There are no comments entered.

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

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

## Viewing Plan Reviews Assigned to You

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

1. Select **My Plan Reviews** on the Agency Springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Reviewer Decision Details page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.

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

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

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

For more information on the Task Management page, see *Managing Tasks*.

## Adding a Manual Plan Review Decision

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

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

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

You can select from these system-defined decision statuses:

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

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

7. Click the **Save** button.

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

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

## Overriding Plan Reviewer Decisions

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

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

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

You can select from these decisions:

- o *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.

# 8 Managing Electronic Plan Reviews

## Electronic Plan Review Process Flow

Some projects require a plan review to evaluate them.

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

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

Electronic plan reviews are created for transactions when the **Plan Review Type** is set to *Electronic* for the associated transaction type. For more information see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

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

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

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

## Managing Electronic Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a series of plan reviews completed by multiple reviewers.

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

As a plan coordinator, you perform these review cycle tasks on the Plan Reviews page

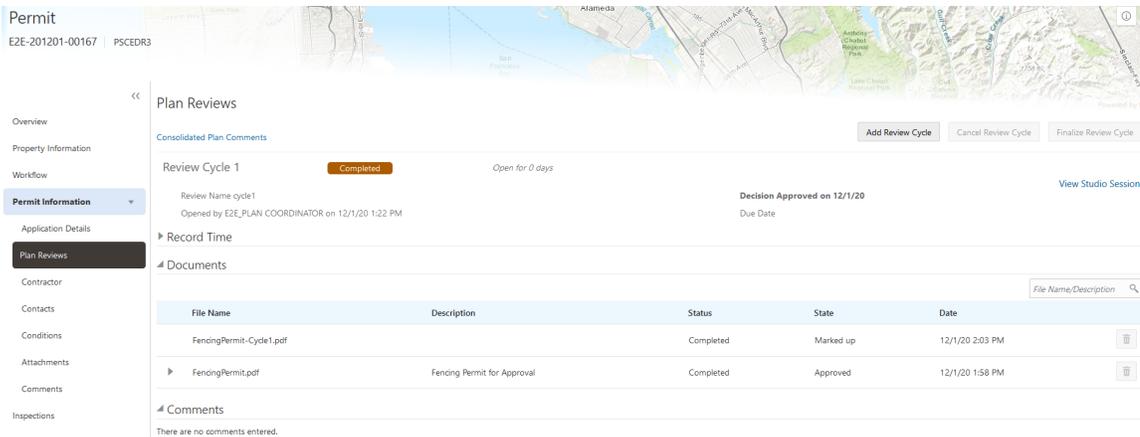
- Add plan review cycles.
- Cancel plan review cycles.
- Add and remove electronic documents.
- Add and remove plan reviewers.
- View the different plan review cycles.

- Add comments for a review cycle.
- View all plan review comments.
- Finalize plan review cycles.

To access the Plan Reviews page for a transaction:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.

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



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

## Electronic Plan Review Cycle Workflow

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

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

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

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

- The current plan review cycle status is *Complete*.
- The plan review decision is *Approved*, *Approved with Comments*, or *Not Required*.
- The review cycle has been finalized.

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

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

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

## Electronic Plan Review Communications

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

**Note:** These events are registered with the Business Rules Framework. For more information, see *Business Rules Framework Overview* and *Setting Up Business Rules*.

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

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

## Adding Electronic Plan Review Cycles

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

1. Click the **Add Review Cycle** button.

This button is available only when:

- You're adding the first plan review cycle for a transaction.
  - All other plan review cycles for the transaction are finalized or canceled.
2. For the initial plan review cycle, the default review cycle name is the transaction type value, but you can enter a different cycle name on the Add Review Cycle page.
  3. Click the **Add** button to add a review cycle and create a Bluebeam Studio™ Session for it. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

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

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

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

## Canceling Electronic Plan Review Cycles

On the Plan Reviews page, click the **Cancel Review Cycle** button to cancel a plan review cycle that is active. This button is available only when the plan review cycle has a status of *In Progress*.

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

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

## Recording Time for Plan Reviews

Agency staff can use the Record Time section to record the time they spend on their plan reviews. For more information, see [Adding Time Entries](#).

**Note:** Time recording is currently available only for permit plan reviews. It will be available for planning application plan reviews in a future release.

## Adding Documents to Electronic Plan Reviews

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

1. Click the **Add Documents** button in the Documents grid.
2. On the Add Documents modal page, select the check box next to the documents you want to add to the review. Only documents in PDF format that are added as attachments for the transaction are available to select. For more information on attachments, see [Working with Attachments](#).

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

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

When the Documents grid refreshes, you'll see the documents to be reviewed with an *In Progress* status. Documents added to a review for the first time have a state of *Initial*. New versions of a document that have been reviewed in a previous cycle have a state of *Resubmitted*.

Reviewed versions of the documents from the previous cycle also appear in the grid, but they have a status of *Completed* and a state of *Marked up*. You can't add reviewers for these complete, marked up documents.

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

## Removing Documents from Electronic Plan Reviews

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

1. In the Documents grid, click the **Delete** button for a document.

You can delete documents when:

- o The plan review cycle is active.
- o The document's status is *In Progress*.
- o No reviewers have been added to the document.

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

## Accessing Conditions of Approval for Planning Applications

Click the **Conditions of Approval** link on the Plan Review page to access the Conditions of Approval page for the planning application. This link is available only for planning applications. For more information on conditions of approval see [Working with Conditions of Approval](#).

## Adding Reviewers to Electronic Plan Reviews

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

If the permit type associated with the permit includes required plan review departments, those departments are displayed at the top of the Documents grid. Once a reviewer from a required department is added to the plan review cycle, that department no longer appears.

1. Expand a document row to view its reviewer information.
2. Click the **Add Reviewers** button.

The Add Reviewers modal page displays a list of available reviewers by plan reviewer department. For more information on plan reviewer departments, see [Setting Up Plan Reviewer Departments](#).

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

3. Select the check box next to each reviewer that you want to add.
4. Click **Save** to add the selected reviewers to the document in the Bluebeam Studio™ Session. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

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

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

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

## Accessing a Studio Session

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

Click the **View Session** link to access the Studio Session using an external Bluebeam™ application.

## Viewing the Different Plan Review Cycles

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

1. Click the **Switch Cycle** link in the plan review header details.

This link is available only when there are two or more plan review cycles.

2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

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

## Adding Comments for a Review Cycle

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

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

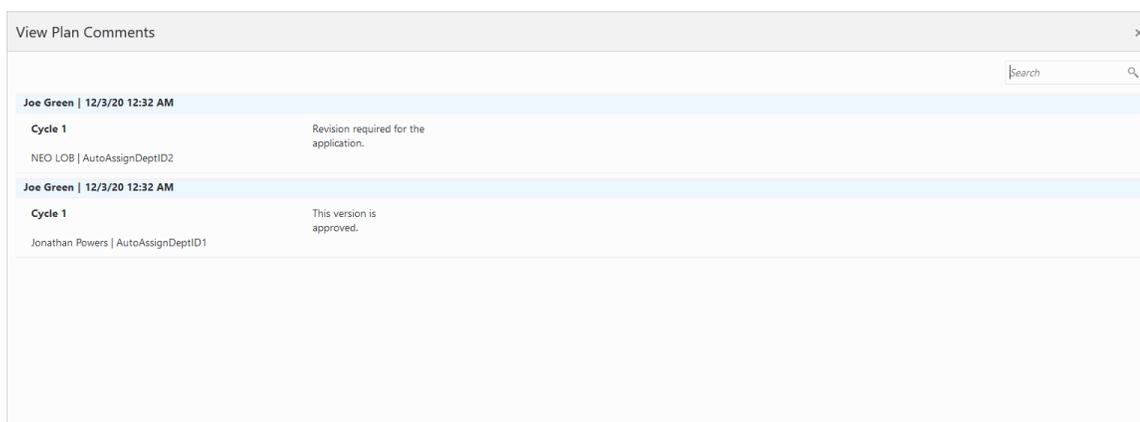
All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or transaction is closed or canceled.

## Viewing All Plan Review Comments

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

Click the **Consolidated Plan Comments** link.

This example shows the View Plan Comments page.



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

## Finalizing a Plan Review Cycle

Click the **Finalize Review Cycle** button to finalize the plan review cycle. This process closes the Studio Session and downloads the marked up documents with *CycleX* appended to the file name where *X* is the number of the review cycle. These downloaded files are added to the list of documents for the plan review cycle and the list of attachments for the transactions. Reviewers can compare these marked up documents to new versions of the document in subsequent review cycles. To perform actions on these downloaded files outside of the plan review process, use the Attachments page. See *Working with Attachments*.

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

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

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

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

## Performing Electronic Plan Reviews

Plan reviewers perform reviews of documents.

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

This example shows the Plan Reviewer Decision Details page.

**Plan Review Decision Details**

---

**Reviewer Details**

Assigned Date: 2/19/20 12:04 AM  
Assigned By: Joe Green  
Review Status: In Progress

Last Updated Date: 2/19/20 12:04 AM  
Last Updated By: Joe Green  
Due Date: 2/26/20

---

**Reviewer Decision**

Reviewer: Jonathan Powers  
Decision:   
Decision Date:

---

**Override Reviewer Decision**

Override By:   
Override Date:   
Override Decision:

---

**Comments**

There are no comments entered.

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

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

## Viewing Plan Reviews Assigned to You

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

1. Select **My Plan Reviews** on the Agency Springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Reviewer Decision Details page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.

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

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

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

For more information on the Task Management page, see *Managing Tasks*.

## Adding an Electronic Plan Review Decision

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

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

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

You can select from these system-defined decision statuses:

- 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.

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

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

8. Click the **Save** button.

The system displays the selected decision in the **Decision** field and populates the **Decision Date** field with a timestamp. In addition, once all reviewers have entered a decision for a document, the system updates the **State** field for the document with the most severe decision status selected by the reviewers.

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

## Overriding Plan Reviewer Decisions

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

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

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the Documents grid, expand the row for the document you want to review.
5. Click the **View More Details** button for the row you want to override.

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

You can select from these decisions:

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

7. Click the **Save** button.

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

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

# 9 Working with Permit Inspections

## Managing Inspections for a Permit

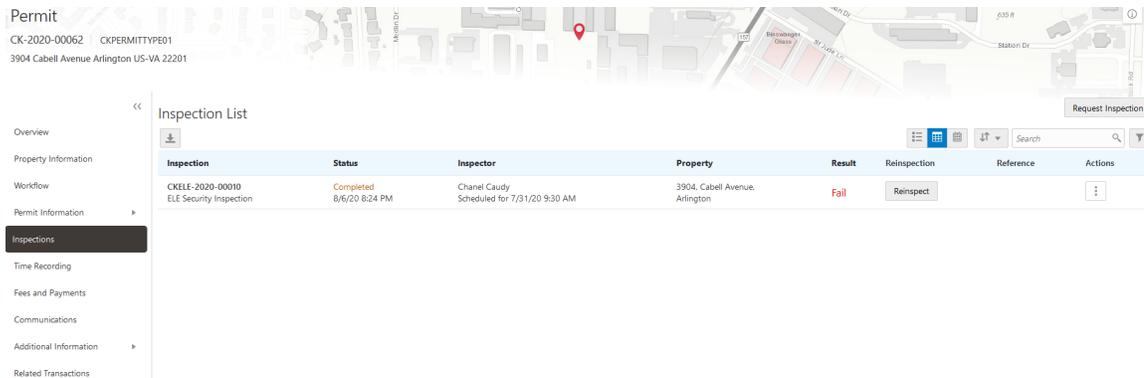
The permit information includes a consolidated list of inspections related to a permit. As a permit coordinator, you manage inspection activity for a permit—including status, inspection results, code or requirement violations, and more—on the Inspection List page.

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

- Manage inspection activity.
- View inspections in a calendar format.
- Perform actions, including access inspection details, and request and schedule an inspection.

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

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



## Monitoring Inspection Activity

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

Page Element	Description
Inspection	View the inspection number that was automatically generated based on the autonumbering definition in the inspection type.

Page Element	Description
	<p>The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a>.</p>
<p><b>Status</b></p>	<p>View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:</p> <ul style="list-style-type: none"> <li>○ <i>Scheduled</i></li> <li>○ <i>Requested</i></li> <li>○ <i>Completed</i></li> <li>○ <i>Canceled</i></li> </ul> <p>A date and time is displayed beneath the <i>Completed</i> statuses to indicate when the inspection was completed.</p>
<p><b>Inspector</b></p>	<p>Identifies the inspector assigned to the inspection.</p> <p>The date and time of the scheduled inspection is displayed beneath the inspector's name.</p>
<p><b>Property</b></p>	<p>View the address of the property associated with the inspection.</p>
<p><b>Result</b></p>	<p>View whether the inspection passed or failed.</p>
<p><b>Reinspection</b></p>	<p>Displays the <b>Reinspect</b> button for failed inspections. Click it to submit a reinspection request.</p>
<p><b>Reference</b></p>	<p>For failed inspections that have been reinspected, this column displays the unique identifier for the reinspection.</p> <p>For reinspections, this column displays the unique identifier of the original failed inspection.</p> <p><b>Note:</b> Reference information appears after you submit a reinspection request.</p>

## Viewing the Inspection Calendar

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

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

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

## Performing Actions from the Inspection List

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

Page Element	Description
<b>Request Inspection</b>	Click to request an inspection on the Inspection Request page. See <i>Requesting Inspections</i> .
<b>Reinspect</b>	<p>Click to access the Inspection Request page where you can submit a reinspection request for a failed inspection. The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.</p> <p>For inspections with a scheduling method of <i>Ready</i>, you must select a <b>Ready by Date</b> and <b>Ready by Time</b>.</p> <p>For inspections with a scheduling method of <i>Request</i>, you must select a <b>Preferred Date</b> and <b>Preferred Time</b>.</p> <p>For inspections with a scheduling method of <i>Schedule</i>, you must click the <b>Select a Time</b> button and select a date and time for the reinspection on the Scheduling modal page.</p>

Page Element	Description
	For more information on the Inspection Request page, see <a href="#">Requesting Inspections</a> .
<b>Actions</b>	Click the icon in this column to select one of the following actions: <ul style="list-style-type: none"> <li>○ <b>View Request:</b> Click to review, update, or cancel an inspection on the Inspection Request page. See <a href="#">Requesting Inspections</a>.</li> <li>○ <b>View Detail:</b> Click to view the inspection details on the Inspection Detail page. See <a href="#">Reviewing Inspection Details</a>.</li> </ul>

## Managing Inspections for an Agency

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

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

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

This example shows the Inspections page.

Inspections Request Inspection

Jacob Smith

Inspection	Permit	Status	Inspector	Property	Result	Reinspection	Reference	Actions
CKELE-2020-00006 ELE Scheduling Inspections	CK-2020-00011 CKPERMITTYPE01	Scheduled	Jacob Smith Scheduled for 4/30/20 6:00 AM	3904, Cabell Avenue, Arlington				⋮
CKELE-2020-00030 ELE Scheduling Inspections	CK-2020-00123 CKPERMITTYPE01	Scheduled	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington				⋮
CKELE-2020-00031 ELE Scheduling Inspections	CK-2020-00130 CKPERMITTYPE01	Completed 4/29/20 5:29 AM	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington	Fail	Reinspect		⋮
CKELE-2020-00033 ELE Scheduling Inspections	CK-2020-00130 CKPERMITTYPE01	Completed 4/29/20 5:57 AM	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington	Fail	Reinspect		⋮
CKELE-2020-00035 ELE Scheduling Inspections	CK-2020-00130 CKPERMITTYPE01	Completed 4/29/20 6:17 AM	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington	Fail	Reinspect		⋮
CKELE-2020-00036 ELE Scheduling Inspections	CK-2020-00130 CKPERMITTYPE01	Scheduled	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington				⋮
CKELE-2020-00038 ELE Scheduling Inspections	CK-2020-00137 CKPERMITTYPE01	Completed 4/29/20 6:38 AM	Jacob Smith Scheduled for 5/1/20 6:00 AM	3904, Cabell Avenue, Arlington	Fail		Reinspected by CKELE-2020-00039	⋮

## Viewing Inspection Information

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

Page Element	Description
	Click to display inspections using the list view. This view is intended for public users.

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

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

Page Element	Description
<b>Inspection</b>	Displays the automatically generated inspection number.  The inspection type is displayed beneath the inspection number. For more information on inspection types, see <a href="#">Setting Up Inspection Types</a> .
<b>Permit</b>	Displays the automatically generated permit number associated with the inspection.  The permit type is displayed beneath the permit number. For more information on permit types, see <a href="#">Setting Up Permit Types</a> .
<b>Status</b>	Displays the inspection status. Valid values are: <ul style="list-style-type: none"> <li>○ <i>Scheduled</i></li> <li>○ <i>Requested</i></li> <li>○ <i>Completed</i></li> <li>○ <i>Canceled</i></li> </ul> A date and time is displayed beneath the <i>Completed</i> status to indicate when the inspection was completed.
<b>Inspector</b>	Displays the name of the inspector assigned to the inspection.  The date and time of the scheduled inspection is displayed beneath the inspector's name.
<b>Property</b>	Displays the address of the property associated with the inspection.
<b>Result</b>	Indicates whether the inspection passed or failed.
<b>Reinspection</b>	Displays the <b>Reinspect</b> button for failed inspections. Click it to submit a reinspection request.

Page Element	Description
<b>Reference</b>	<p>For failed inspections that have been reinspected, this column displays the unique identifier for the reinspection.</p> <p>For reinspections, this column displays the unique identifier of the original failed inspection.</p> <p><b>Note:</b> Reference information appears after you submit a reinspection request.</p>

## Performing Actions for Inspections

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

Page Element	Description
<b>Request Inspection</b>	Click to request an inspection on the Inspection Request page. See <i>Requesting Inspections</i> .
<b>Reinspect</b>	<p>Click to access the Inspection Request page where you can submit a reinspection request for a failed inspection. The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.</p> <p>For inspections with a scheduling method of <i>Ready</i>, you must select a <b>Ready by Date</b> and <b>Ready by Time</b>.</p> <p>For inspections with a scheduling method of <i>Request</i>, you must select a <b>Preferred Date</b> and <b>Preferred Time</b>.</p> <p>For inspections with a scheduling method of <i>Schedule</i>, you must click the <b>Select a Time</b> button and select a date and time for the reinspection on the Scheduling modal page.</p> <p>For more information on the Inspection Request page, see <i>Requesting Inspections</i>.</p>
<b>Actions</b>	<p>Click the icon in this column to select one of the following actions:</p> <ul style="list-style-type: none"> <li>○ <i>View Request</i>: Click to review, update, or cancel an inspection on the Inspection Request page. See <i>Requesting Inspections</i>.</li> <li>○ <i>View Detail</i>: Click to view the inspection details on the Inspection Detail page. See <i>Reviewing Inspection Details</i>.</li> </ul>

## Requesting Inspections

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

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

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

### Requesting an Inspection

1. Click the **Request Inspection** button from one of the following locations:
  - o Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.
  - o Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

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

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

**Note:** If you are requesting an inspection from the Inspection List page for a specific permit, the **Permit** is already selected on the modal page.
3. Select an **Inspection Type**. The inspection types available to select on the modal page are determined by the inspection group that is associated with the permit type.

**Note:** Agency staff can select the **Show All Inspection Types** check box to make all inspection types available for selection. This check box is not available to public users.

4. Click **Continue**.

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

This example shows the Inspection Request page.

Inspection Request Cancel Submit

Permit CK-2020-00533

Permit Type CKPERMITTYPE01

\* Inspection Type GRD Inspection Requesting Inspe...

\* Preferred Date 2/6/20

\* Preferred Time Morning

Comments Enter Comments

Address 3904  
Cabell Avenue  
Arlington, US-VA 22201  
Change Address

Inspection Location

Location Contact Jina Jose

Contact Method Phone

\* Phone (456) 976-3214

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

Page Element	Description
<b>Ready by Date and Ready by Time</b>	<p>Enter the date and time by which the permit will be ready for the inspection you are requesting.</p> <p><b>Note:</b> These fields appear only for inspection types with a <b>Scheduling Method</b> of <i>Ready</i>. See <a href="#">Setting Up Inspection Types</a>.</p>
<b>Preferred Date and Preferred Time</b>	<p>Select a preferred date and time period for the inspection. You can select one of the next seven calendar days allowed by the inspection calendar, holiday calendar, and schedule cutoff time. Select a time period from the available values.</p> <p><b>Note:</b> These fields appear only for inspection types with a <b>Scheduling Method</b> of <i>Request</i>. See <a href="#">Setting Up Inspection Types</a>.</p>
<b>Comments</b>	Enter any comments for the inspection.
<b>Address</b>	<p>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.</p> <p>For more information on parcel addresses, see <a href="#">Setting Up Property Addresses</a></p>
<b>Change Address</b>	Click to associate the inspection with another address that is already defined for the permit record.

Page Element	Description
	<p><b>Note:</b> This button appears only if multiple addresses have been defined for the permit record.</p>
<b>Inspection Location</b>	Enter location information associated with the inspection.
<b>Location Contact</b>	<p>By default, the system populates this field with the primary contact associated with the permit. Click the <b>Change Location Contact</b> icon to select a different contact name on the Change Location Contact modal page.</p> <p><b>Note:</b> When you change the location contact, the <b>Contact Method, Email, and Phone</b> fields are populated with the new contact's information.</p>
<b>Contact Method, Email, and Phone</b>	<p>Select a contact method from the following values:</p> <ul style="list-style-type: none"> <li>○ <i>None</i></li> <li>○ <i>Email</i></li> </ul> <p>When you select this value, the <b>Email</b> field becomes available. Use it to enter the contact's email address.</p> <ul style="list-style-type: none"> <li>○ <i>Phone</i></li> </ul> <p>When you select this value, the <b>Phone</b> field becomes available. Use it to enter the contact's phone number.</p> <p><b>Note:</b> By default, the value of the <b>Contact Method</b> is <i>Phone</i> and the phone number of the applicant for the permit associated with the inspection request is displayed in the <b>Phone</b> field. If a phone number is not entered for an applicant, the default value of <b>Contact Method</b> is <i>Email</i> and the email address of the applicant is displayed in the <b>Email</b> field. If neither a phone number nor an email address are defined for the applicant, the default value of <b>Contact Method</b> is <i>None</i> and the <b>Phone</b> and <b>Email</b> fields are not displayed.</p>

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

This example shows the Scheduling modal page.

### Scheduling ✕

**Permit** CK-2020-00130      **Duration in Hours** 3

**Inspection Type** ELE Scheduling Inspections      **District** CK\_INSPECTION\_DISTRICT\_ELE

Date	▲	Time	Select
Friday, May 8, 2020		9:00 AM ▼	Select
Monday, May 11, 2020		9:00 AM ▼	Select
Tuesday, May 12, 2020		9:00 AM ▼	Select
Wednesday, May 13, 2020		9:00 AM ▼	Select
Thursday, May 14, 2020		9:00 AM ▼	Select

**Note:** Inspections supervisors have additional options available on this page. For more information on scheduling inspections as a supervisor, see [Assigning Inspections Using the Supervisor Calendar](#).

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

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

For more information, see [Setting Up Inspection Scheduling](#).

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

7. Click **Save**.

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

## Modifying an Inspection Request

1. Select the **View Request** action for an inspection from one of the following locations:
  - o Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.
  - o Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

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

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

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

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

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

4. Click **Save**.

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

## Canceling an Inspection Request

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

1. Select the **View Request** action for an inspection from one of the following locations:
  - o Inspection List page of the permit details, which you can access by clicking **Permit List** on the Agency Springboard. See *Managing Inspections for a Permit*.
  - o Inspections page, which you can access by clicking **Inspections** on the Agency Springboard. See *Managing Inspections for an Agency*.

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

2. Click **Cancel Inspection**.

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

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

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

## Assigning Inspections Using the Supervisor Calendar

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

### Assigning Individual Inspections

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

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

Supervisor Calendar

Unassigned Assigned May 8, 2020

Permit	Inspection	District	Property	Duration in Hours	Preferred Inspector	Preferred Time	Ready By	Assign
CK-2020-00200	CKFNL-2020-00144 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2	Amy Scott		5/6/20 5:00 PM	Assign
CK-2020-00206	CKFNL-2020-00165 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2			5/8/20 2:00 PM	Assign
CK-2020-00208	CKFNL-2020-00166 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2			5/8/20 2:00 PM	Assign
CK-2020-00212	CKFNL-2020-00170 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2			5/8/20 2:00 PM	Assign
CK-2020-00202	CKFNL-2020-00154 FNL Security Inspection	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2	Roger Penrose		5/8/20 1:00 AM	Assign
CK-2020-00213	CKFNL-2020-00174 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904 Cabell Avenue Arlington	2	Amy Scott		5/7/20 5:00 PM	Assign

Page 1 of 1 (1-6 of 6 items) Show 10 Items

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

- o No inspector is assigned.
- o The status is *Requested*.
- o For inspections with a scheduling method of *Ready* the inspection request ready by date is less than or equal to the date selected at the top of the page.

For inspections with a scheduling method of *Request* the preferred date is less than or equal to the date selected at the top of the page.

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

For each inspection, the tab displays the following information:

Page Element	Description
<b>Permit</b>	<p>Displays the permit ID associated with the inspection. Click to access the Permit Details page.</p> <p><b>Note:</b> Because this page displays the permit ID for inspections, you may see multiple inspections with the same permit ID.</p>
<b>Inspection</b>	<p>Displays the inspection number that was automatically generated based on the autonumbering definition in the inspection type.</p> <p>The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a>.</p>
<b>District</b>	Displays the district associated with the inspection.
<b>Property</b>	Displays the address of the property associated with the inspection.
<b>Duration in Hours</b>	Displays the expected duration of the inspection in hours.
<b>Preferred Inspector</b>	<p>Displays the name of the inspector determined to be the best choice for performing the inspection. A preferred inspector is assigned when:</p> <ul style="list-style-type: none"> <li>○ The inspection is a reinspection. The preferred inspector is the inspector who performed the original failed inspection.</li> <li>○ The inspection is being performed at the same location as a previous or scheduled inspection. The preferred inspector is the inspector who previously performed an inspection or is currently scheduled to perform an inspection at the location.</li> </ul> <p>When more than one inspector qualifies as the preferred inspector, this field displays a value of <i>Multiple</i>.</p>
<b>Preferred Time</b>	Displays the preferred date and time period for the inspection.
<b>Ready By</b>	Displays the date and time when the permit is ready for the inspection.

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

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

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

**Scheduling** [Close]

Permit CK-2020-00202      Duration in Hours 2  
 Inspection Type FNL Security Inspection      District CK\_INSPECTION\_DISTRICT\_FNL

▲ Override Availability

Inspector [Dropdown] [Select]  
 Date 5/6/20 [Calendar Icon]      Time [Time Picker]

Date	Inspector	Time	Select
Friday, May 8, 2020	Roger Penrose	8:00 AM ▼	[Select]
Friday, May 8, 2020	Amy Scott	9:00 AM ▼	[Select]
Friday, May 8, 2020	E2E_INSPECTOR 1	1:00 AM ▼	[Select]
Friday, May 8, 2020	Chanel Caudy	12:00 AM ▼	[Select]
Saturday, May 9, 2020	Roger Penrose	8:00 AM ▼	[Select]
Saturday, May 9, 2020	E2E_INSPECTOR 1	1:00 AM ▼	[Select]
Saturday, May 9, 2020	Chanel Caudy	12:00 AM ▼	[Select]
Sunday, May 10, 2020	Roger Penrose	8:00 AM ▼	[Select]

Page 1 of 4 (1-8 of 26 items) [Navigation icons]

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

**Note:** A flag icon appears next to preferred inspectors.

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

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

## Assigning Inspections in Batch

1. Click **Supervisor Calendar** on the Agency Springboard.
2. (Optional) Use the **Previous Day**, **Next Day**, and **Select a Date** buttons at the top of the page to adjust which inspections are displayed.

The tab displays unassigned inspections with a preferred date or ready by date that is less than or equal to the selected date.

**3. Click Select Multiple.**

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

Supervisor Calendar

Unassigned Assigned May 8, 2020

Permit	Inspection	District	Property	Duration in Hours	Preferred Inspector	Preferred Time	Ready By
<input checked="" type="checkbox"/>	CK-2020-00200	CKFNL-2020-00144 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2	Amy Scott		5/6/20 5:00 PM
<input type="checkbox"/>	CK-2020-00206	CKFNL-2020-00165 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2			5/8/20 2:00 PM
<input type="checkbox"/>	CK-2020-00208	CKFNL-2020-00166 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2			5/8/20 2:00 PM
<input type="checkbox"/>	CK-2020-00212	CKFNL-2020-00170 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2			5/8/20 2:00 PM
<input type="checkbox"/>	CK-2020-00202	CKFNL-2020-00154 FNL Security Inspection	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2	Roger Penrose		5/8/20 1:00 AM
<input checked="" type="checkbox"/>	CK-2020-00213	CKFNL-2020-00174 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL 3904, Cabell Avenue Arlington	2	Amy Scott		5/7/20 5:00 PM

Page 1 of 1 (1-6 of 6 items) Show 10 items

**4. Select the check box next to each inspection that you want to assign.**

**5. Click Assign to run the automatic batch assignment process. The process assigns inspections based on:**

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

For more information on these inspection scheduling factors, see [Setting Up Inspection Scheduling](#).

## Reassigning Inspections

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

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

Supervisor Calendar

Unassigned Assigned May 7, 2020

Permit	Inspection	District	Property	Duration in Hours	Inspector	Schedule Start Date	Schedule End Date	Reassign
CK-2020-00202	CKFNL-2020-00147 FNL Inspection Requesting Inspections	CK_INSPECTION_DISTRICT_FNL	3904, Cabell Avenue Arlington	2	Amy Scott	5/7/20 2:00 PM	5/7/20 4:00 PM	Reassign
CK-2020-00158	CKELE-2020-00075 ELE Scheduling Inspections	CK_INSPECTION_DISTRICT_ELE	3904, Cabell Avenue Arlington	3	Gautam Mahadeo	5/7/20 9:00 AM	5/7/20 12:00 PM	Reassign
CK-2020-00195	CKFNL-2020-00135 FNL Security Inspection	CK_INSPECTION_DISTRICT_FNL	3904, Cabell Avenue Arlington	2	Amy Scott	5/7/20 2:00 PM	5/7/20 4:00 PM	Reassign

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

- o An inspector is assigned.
- o The status of the inspection is *Scheduled*.
- o The inspection scheduled start date is equal to the date selected at the top of the page.

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

Assigned inspections display the following information:

Page Element	Description
<b>Permit</b>	<p>Displays the permit number associated with the inspection. Click to view detailed information about the permit.</p> <p><b>Note:</b> Because this page displays the permit ID for inspections, you may see multiple inspections with the same permit ID.</p>
<b>Inspection</b>	<p>Displays the inspection number that was automatically generated based on the autonumbering definition in the inspection type.</p> <p>The inspection type is displayed beneath the inspection number. Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a>.</p>
<b>District</b>	Displays the district associated with the inspection.
<b>Property</b>	Displays the address of the property associated with the inspection.
<b>Duration in Hours</b>	Displays the expected duration of the inspection in hours.
<b>Inspector</b>	Displays the name of the inspector assigned to the inspection.
<b>Schedule Start Date and Schedule End Date</b>	Displays the dates and times when the inspection is scheduled to start and end.

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

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

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

Scheduling
✕

Permit CK-2020-00202

Inspection Type FNL Security Inspection

Duration in Hours 2

District CK\_INSPECTION\_DISTRICT\_FNL

▲ Override Availability

Inspector

Date 5/6/20

Select

Time

Date	Inspector	Time	Select
Friday, May 8, 2020	Roger Penrose	8:00 AM ▼	Select
Friday, May 8, 2020	Amy Scott	9:00 AM ▼	Select
Friday, May 8, 2020	E2E_INSPECTOR 1	1:00 AM ▼	Select
Friday, May 8, 2020	Chanel Caudy	12:00 AM ▼	Select
Saturday, May 9, 2020	Roger Penrose	8:00 AM ▼	Select
Saturday, May 9, 2020	E2E_INSPECTOR 1	1:00 AM ▼	Select
Saturday, May 9, 2020	Chanel Caudy	12:00 AM ▼	Select
Sunday, May 10, 2020	Roger Penrose	8:00 AM ▼	Select

Page  of 4 (1-8 of 26 items) ⏪ < 1 2 3 4 > ⏩

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

**Note:** A flag icon appears next to preferred inspectors.

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

## Viewing the Daily Inspection Schedule

The Schedule grid at the bottom of the page displays the inspections that are scheduled for the date selected at the top of the page.

This example shows the Schedule grid of the Supervisor Calendar page.

Schedule ◀ 8 AM - 5 PM ▶

Inspector	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM
		CKELE-2018-00014 ELE Scheduling Inspections								
		CKPLU-2018-00011 HVAC Inspection Scheduling Inspections								
	CKFNC-2018-00010 FNC Scheduling Inspections									

The grid displays inspections for a nine-hour period of the day. You can adjust the nine-hour period that's displayed by clicking **Back One Hour** or **Forward One Hour** at the top of the grid.

## Viewing Assigned Inspections

Inspectors and inspection supervisors can view details about all inspections, including inspections assigned to them, on pages they access from their laptops or desktops. They can also view the inspections assigned to them in a calendar on the Oracle Inspector mobile application. Inspection supervisors view daily inspections for the inspection types and districts they are responsible for using Oracle Inspector.

Inspection assignments are based on attributes, such as inspection type and inspection district, that are associated with the job functions. For more information about inspection job functions and attributes, see [Setting Up Agency Staff](#).

### Viewing Inspections Assigned to Me

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

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

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

Inspection assignments appear in the task grid.

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

For information about inspection details for a permit, see [Reviewing Inspection Details](#).

### Viewing All Assigned Inspections

Agency staff including inspectors and inspection supervisors can view all assignments on the Inspections page accessed using a desktop or laptop:

1. Select the **Inspections** tile on the Agency Springboard or in the global navigation go to **Inspections > Inspections**.
2. The Inspections page opens. You can sort by these values in the list:
  - o *Permit*
  - o *Permit Type*
  - o *Inspection*
  - o *Inspection Type*
  - o *Status*
  - o *Date*
  - o *Inspector*
  - o *Result*
3. Click the **Request Inspection** button to open the Inspection Request page to begin the scheduling process.

For more information about scheduling an inspection, see [Requesting Inspections](#).

4. In the **Actions** column, you can select *View Request* or *View Detail*, which opens the inspections information for a permit in the permit details pages.

## Viewing the Daily Schedule for Inspections in Oracle Inspector

You can view the inspections assigned to you whether you are a supervisor or inspector on the Inspection Tasks page in Oracle Inspector. As an inspection supervisor, you can also view the inspections you are responsible for and the assigned inspectors for a selected day.

1. Click the **Navigator** button in the global banner.
2. Select **Inspections > Mobile Inspections**.
3. The Inspection Tasks page opens in Oracle Inspector.

As an inspector, you see a list of your assigned inspections for the current day.

If you are an inspector supervisor:

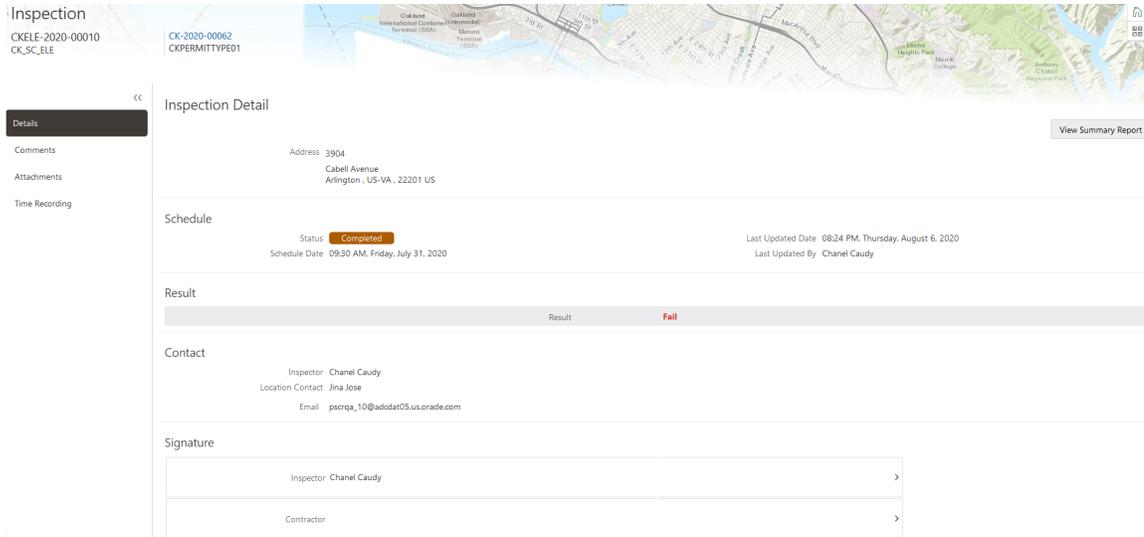
- o Click the **All Inspections** tab to view the daily inspections for the inspection types and districts you are responsible for. The list of inspections shows inspection information including the inspector's name.
  - o Click the **My Inspections** tab to view a list of your daily scheduled inspections and summary information.
4. Click the inspection task row to open the Inspection Details page. From here you can review or perform the inspection.

For more information about using the Oracle Inspector mobile application to view assigned inspections on a phone, see [Viewing Inspection Tasks](#).

## Reviewing Inspection Details

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

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



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

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

## Reviewing the Inspection Details for a Permit

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

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

Page Elements	Description
<b>Schedule</b> 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 <a href="#">Requesting Inspections</a> .
<b>Result</b> section	Review the inspection results, rating, score, and number of major violations of completed inspections.  For more information about results, see <a href="#">Viewing Inspection Results</a> .
<b>Contact</b> 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.

Page Elements	Description
<b>Signature</b> section	View the signatures added when the inspection is complete in the Oracle Inspector mobile application. Signatures are required depending on the inspection setup.

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

## Recording Time for Inspections

Agency staff can use the Time Recording page to record the time they spend on inspections. For more information, see *Adding Time Entries*.

## Viewing Inspection Documents

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

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

Inspection  
MBL-190213-00002  
MBL\_INSTYPE\_1

ICPERMANUAL  
CX-2019-00017

« Attachments

Details  
Comments  
Attachments

File Information	Description	Source	Reference	Actions
Payload1.txt File Size: 3.332 Uploaded On: 2/14/19 1:50 AM Uploaded By: BUILDING_INSPECTOR	Result			⋮
Payload1.txt File Size: 3.332 Uploaded On: 2/13/19 8:42 AM Uploaded By: BUILDING_INSPECTOR	Details page	Inspection		⋮
Payload2.txt File Size: 3.332 Uploaded On: 2/13/19 8:43 AM Uploaded By: BUILDING_INSPECTOR	checklist item2	Checklist Item	Checklist: MBL_CHKLIST_1 Description Checklist Item: MBL_ListItem1	⋮
Payload2.txt File Size: 3.332 Uploaded On: 2/13/19 8:43 AM Uploaded By: BUILDING_INSPECTOR	checklist item	Checklist Item	Checklist: MBL_CHKLIST_1 Description Checklist Item: MBL_Item2	⋮
AttachUploadDummyFile.txt File Size: 118 Uploaded On: 2/14/19 5:14 AM Uploaded By: BUILDING_INSPECTOR	Attach Item1	Checklist	Checklist: MBL_CHKLIST_1 Description	⋮

## Reviewing Inspection Documents

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

- Select the **Permits** tile on the Agency Springboard.
- Click the row for a permit application to access the details.
- Click the **Inspections** menu item in the left panel.
- On the Inspection List page, click the **View Details** button to access the details for the selected inspection.

- Click the **Attachments** menu item in the left panel to review the following information on the Attachments page:

Page Element	Description
<b>File Information</b>	View the following information in the <b>Filename</b> field: <ul style="list-style-type: none"> <li>○ Filename with file type extension</li> <li>○ <i>File Size</i></li> <li>○ <i>Uploaded By</i> user name</li> <li>○ <i>Uploaded On</i> date</li> </ul>
<b>Description</b>	View the description of the attachment as entered by the person who added the attachment.
<b>Source</b>	View the level at which the document was added. In the Oracle Inspector mobile application, inspectors can add documents at the inspections level, at the checklist level, and at the checklist item level.
<b>Reference</b>	View the checklist name and checklist item name associated with the document, if applicable.
<b>Actions</b>	Click the actions icon to select and perform an action: <ul style="list-style-type: none"> <li>○ <i>View Details</i> - Open the details modal page to view the attachment details.</li> <li>○ <i>Download</i> - Click to save the document to your computer.</li> </ul>

- Click the **Sort By** to view attachments grouped by the available fields:

- File Name
- File Size
- Uploaded On
- Uploaded By
- Source
- Checklist
- Checklist Item
- Description

You can also filter by these fields except for file size and description.

- To find a specific attachment, you can enter values in the search field.

## Viewing Inspection Results

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

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

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

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

- Overview page
- Inspection List page
- Inspection Detail page

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

Page Element	Description
<b>Result</b>	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.
<b>Rating</b>	View the inspection rating, which is based on the range of scores defined by the agency.
<b>Score</b>	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.
<b>Major Violation</b>	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.

Inspection

MBL-180814-00037  
MBL\_INSTYPE\_4

GAB0716A  
PE\_GP-00003-JUL17

<< Inspection Detail [View Summary Report](#)

Address 2212 SOUTHWEST CENTER C  
ALAMEDA, 06001, US-CA USA Inspection Location

Schedule

Status: **Completed** Last Updated Date 10:07 AM, Tuesday, Aug 14, 2018  
Schedule Date 01:00 AM, Wednesday, Aug 15, 2018 Last Updated By First.Last  
ETA 01:00 AM

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.

# 10 Using Oracle Inspector

## Overview of Mobile Oracle Inspector for Permits

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

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

Before you begin, you must download the Oracle Inspector application for your mobile device from the iOS App Store for Apple iOS devices or Google Play for Android devices. For information about installing the application and configuring the agency's host URL, see *Installing and Configuring Oracle Inspector*.

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

## Installing and Configuring Oracle Inspector

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

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

### Before You Begin

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

- An agency staff profile

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

- Appropriate security

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

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

## Installing Oracle Inspector

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

## Configuring the Oracle Inspector Environment

1. On your mobile device, access the email that you have received from your administrator and click the *Mobile Application Activation* link.
2. Click the **Agree** button on the End User License Agreement page the first time you open Oracle Inspector or when you reinstall the mobile application.  
You must agree to proceed to the next step.
3. The confirmation page appears with the Application Host URL automatically populated. Click the **Get Started** button.
4. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.
5. Select the **Save user ID** check box, if desired. The next time you return after logging out, you don't have to reenter your user ID.
6. After your login credentials are successfully authenticated, the setup page appears with a progress bar displaying the progress of the package download.
7. After installation completes, the application home page – Inspection Tasks – appears for the current day.

For more information about inspection tasks in Oracle Inspector, see [Oracle Inspector Overview](#).

## Resetting the Application Host URL

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

To change the host URL:

1. Log in to Oracle Inspector.
2. Click the global navigation button in the upper left corner of the application.  
When you click the button, you'll see a list of menu items.
3. Click the **Reset Application URL** link in the menu to open the Reset Application URL page.
4. Enter the desired application host URL in the field.
5. Click the **Update** button.
6. Log back into Oracle Inspector using your login credentials.

## Viewing Inspection Tasks

When you log into the Oracle Inspector mobile application, you see a list of your assigned inspections for the day. As an inspection supervisor, you can also view today's inspections and the assigned inspectors. The calendar provides access to the inspections scheduled for a specific date. By selecting an inspection, you access the pages for performing the tasks associated with the inspection.

On the Inspection Tasks page, inspectors can:

- View the daily job list for inspections assigned to them 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.
- Access inspection details and checklists for performing the inspection.

Inspection supervisors can also view all inspections they are responsible for based on the inspection type and inspection district attributes associated with their job function. For more information about the inspection job functions, see *Setting Up Agency Staff*.

This example illustrates the inspection supervisor's view of the 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.

**Inspection Tasks**

My Inspections | All Inspections

Monday, October 19, 2020 5 total tasks

- 09:00 AM**  
**3904, Cabell Avenue**  
**Arlington, 22201**  
 ELE Scheduling Inspections  
 CKPERMITTYPE01  
 CK-2020-00530  
**Completed**  
 Assigned to Roger Penrose Pass
- 09:00 AM**  
**3904, Cabell Avenue**  
**Arlington, 22201**  
 ELE Scheduling Inspections  
 CKPERMITTYPE01  
 CK-2020-00530  
**Scheduled**  
 Assigned to lindsay moore
- 09:00 AM**  
**3904, Cabell Avenue**  
**Arlington, 22201**  
 ELE Scheduling Inspections  
 CKPERMITTYPE01  
 CK-2020-00530  
**Scheduled**  
 Assigned to Amy Scott
- 12:00**  
**3904, Cabell Avenue**  
**Arlington, 22201**  
 MBL\_INSTYPE\_1 Description  
 Pavment BNP

The Inspection Tasks page, which includes the **My Inspections** and **All Inspections** tabs for supervisors, provides a daily calendar view with inspections organized by scheduled time.

Left Column	Middle Column	Right Column
Time using 12-hour clock  AM or PM	Summary of Assigned Inspection: <ul style="list-style-type: none"> <li>Property Location</li> <li>Inspection Description</li> </ul>	Results for Completed Inspection: <ul style="list-style-type: none"> <li><b>Result</b> - Did the inspection pass? For example, <i>Pass</i>.</li> </ul>

Left Column	Middle Column	Right Column
	<ul style="list-style-type: none"> <li>Permit Type</li> <li>Permit Number</li> <li>Inspector Assignment (available only in the supervisor's view of inspections on the All Inspections tab)</li> </ul> <p>Inspection Status – For example, <i>Scheduled</i>, <i>Completed</i>, or <i>Canceled</i>.</p>	<ul style="list-style-type: none"> <li><b>Rating</b> - What is the inspection grade? For example, <i>A</i>.</li> <li><b>Score</b> - What is the overall total score of the inspection? For example, <i>100</i>.</li> <li><b>Condition</b> - 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.</li> </ul> <p><b>Note:</b> Values for inspection results are configured by the agency.</p>

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

You can also use the action icons in the calendar to navigate to inspections for a specific date:

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

## Opening the Map View

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

The map view icon looks like this:  .

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.

You can also view a map of the selected property from the Inspection Detail page.

## Working with Inspection Details

In the Oracle Inspector mobile application, you view inspection details, such as inspection number, location, and description, and initiate actions for performing inspections on the Inspection Detail page.

Access the Inspection Detail page by selecting an inspection from the list on the My Inspection Tasks page. On the 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. The inspection is scheduled and has one checklist.

  Inspection Detail

### Residential Addition Inspection

INSP-2020-00025  
Residential Addition : [RESADD-2020-00025](#)

1217 WALNUT ST  
ALAMEDA, California, 94501 

**Scheduled**  
02:00 PM, Thursday, May 21, 2020  
ETA 02:00 PM

Inspector Kaitlyn Haney  
Location Contact Jack Snow  
Phone +1 (666) 666-6666

---

 Checklists 1

---

 Conditions

---

 Attachments

---

 Comments

---

 [Result](#) [Submit](#)

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

- Location
- Status
- Scheduled date and time
- Estimated time of arrival (ETA)
- Inspector
- On-location contact person
- 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.
<b>Checklists</b>	View the number of checklists to complete for the inspection.  Click to open the Inspection Checklist page.
<b>Conditions</b>	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 hold or lock. If there are multiple conditions applied to the permit, the most severe condition is displayed here.  For more information about conditions, see <a href="#">Applying Conditions to Applications</a> .
<b>Attachments</b>	View the number of documents attached to the inspection.  Click to open the Attachments page, where you can review or upload attachments or documents related to the inspection, such as videos or annotated photos.  On the Attachments page, you can also search for, filter, and sort attachments and select which inspection attachments you want to view.  You can choose to view all documents, documents attached at the inspection level, or documents for checklists and checklist items.
<b>Comments</b>	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.
<b>Time Reporting</b>	Click to open the Time Reporting page, where you can view and filter time entries associated with the inspection. From here, you can add entries to record the amount of time you spend on various activities. For more information, see
<b>Actions</b>	Click the <b>Actions</b> icon at the bottom of the page to do the following: <ul style="list-style-type: none"> <li>• <b>Update ETA</b> – 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.</li> <li>• <b>View Summary Report</b> – View the inspection summary report.</li> </ul>
<b>Result</b>	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.

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

## Viewing the Mobile Permit Summary

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

For more information about the Overview page and its functionality on a laptop or desktop computer, see [Viewing the Permit Summary](#).

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

- Review a summary of property, applicant, workflow, and inspections information.
- Add or update an expiration date for the permit.
- Add or update a description of the permit.
- Print the building permit to a PDF file.
- Access project and fee details.

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

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

The screenshot displays the Oracle Inspector mobile application interface for a permit. At the top, there is a navigation bar with a back arrow, a menu icon, and the text "Permit" with a dropdown arrow. Below this, the permit ID "RESADD-2020-00025" is shown in a large font, with "Residential Addition" underneath. A teal button labeled "Inspection" is positioned to the right of the permit ID. The main content area is divided into several sections: "Property" with a location pin icon and address "1217,WALNUT ALAMEDA,California,94501"; "Issue Date" with the value "5/19/20"; "Expiration Date" with the value "5/19/21"; "Description" with the text "Apply for Residential Addition permit" and a pencil icon; "Applicant" with the name "Jack Snow"; "Workflow" with the text "Approve Final Inspection", "Status In Progress", and "Last Updated 5/19/20"; and "Fees and Payments" with "Total Payable" of "26,700.00 USD". At the bottom, there is a button labeled "Print Permit".

## Working with Conditions

You can apply and resolve conditions on permits in the Oracle Inspector mobile application on the Conditions page.

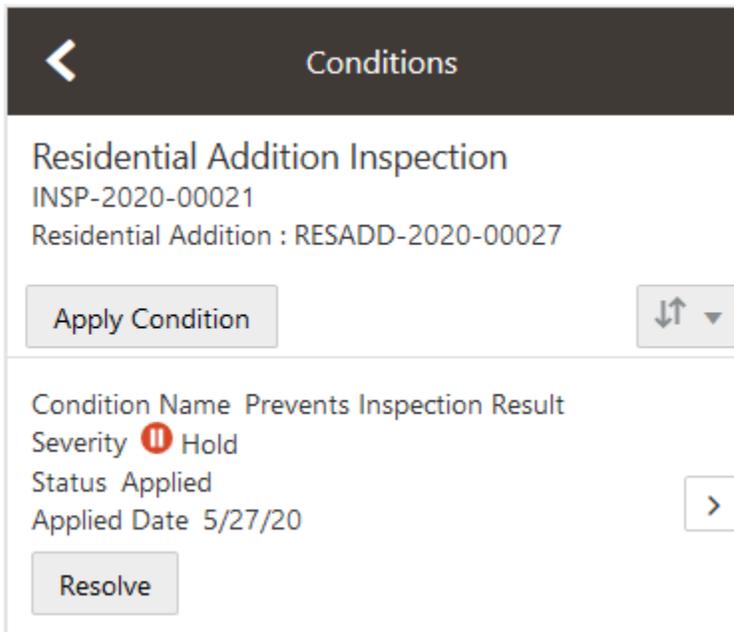
If conditions have been applied to a permit, an icon appears on various pages to indicate the type of condition, such as lock, hold, or notice. If there are multiple conditions applied to the permit, the most severe condition is displayed, that is, a lock.

When you access the Conditions page by clicking the **Conditions** button on the Inspection Details 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
<b>Apply Condition</b>	Click this button to add a new restriction to the permit. See <i>Applying Conditions to Applications</i> .
<b>Resolve</b>	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.

## Reporting Inspection Time

You can record the time that you spend working on inspections for the purposes of billing and reporting on the Time Reporting pages in the Oracle Inspector mobile application.

Access the Time Reporting pages by clicking the **Time Reporting** button on the Inspection Details page. Here you can:

- View and sort time entries for an inspection.
- View time entry details.
- Enter time for an activity.
- Delete time entries.

When you add a time entry on the Time Details page, you record the duration of the activity, whether the time is billable, and comments.

For more information about time reporting, see [Adding Time Entries](#).

## Using Inspection Checklists

An inspection can have one or more checklists that cover the scope of the codes and requirements. Depending on the permit requirements, an inspection may have checklists with one or more checklist items, or none at all. You work through the checklists and provide inspection results on the checklist pages in the Oracle Inspector mobile application.

To access the checklists, click the **Checklist** button on the Inspection Detail page. When you're performing an inspection, you can do the following at the checklist level:

- 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. The inspection is scheduled with no results provided yet.

←
Inspection Checklist
Save

### Residential Addition Inspection

INSP-2020-00025

---

**Residential Addition Inspection Checklist**

Result *No Result*

Total Score

0%

>

0 / 6

^

🗨️ Comments
>

---

📎 Attachments
>

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

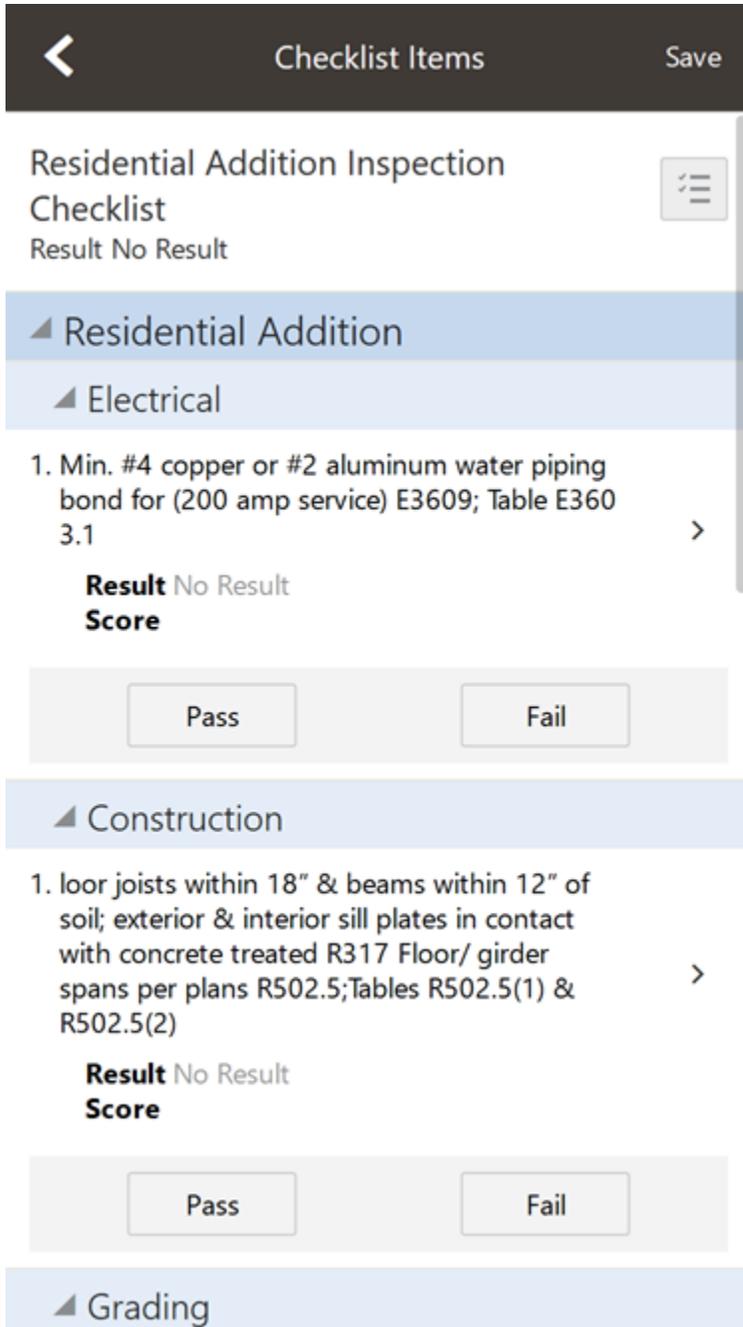
Page Elements	Description
	<p>populates the result based on the scoring method. If scoring is not used, the inspector must manually add the result.</p> <p><b>CAUTION:</b> You can't update the inspection result on the checklist items, checklists, and inspection when a condition to prevent the inspection result has been applied. You must resolve the issue first and when necessary, reschedule the inspection.</p>
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	<p>View the number of documents attached to the inspection.</p> <p>Click to open the Attachments page, where you can review or upload attachments or documents related to the inspection, such as videos or annotated photos.</p> <p>On the Attachments page, you can also search for, filter, and sort attachments and select which inspection attachments you want to view.</p> <p>You can choose to view all documents, documents attached at the inspection level, or documents for checklists and checklist items.</p>

## Working with Checklist Items

To drill down to checklist items, select a checklist on the Inspection Checklist page. 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. There are no results entered for the checklist items.



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

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

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

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 entered for this checklist item.

**Checklist Item Result** Save

< Previous 1 / 6 Next >

**Residential Addition Inspection Checklist**  
Residential Addition - Electrical

1 . Min. #4 copper or #2 aluminum water piping bond for (200 amp service) E3609; Table E360 3.1

**Result**

Pass Fail

Score

Comments (0) Attachments

There are no comments entered.

Add Comment

## Submitting Inspection Results

You submit inspection results to complete an assigned inspection on the Inspection Result page in the Oracle Inspector mobile application.

To enter results, click the **Result** button on the Inspection Detail page. 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, which is described in the surrounding text. The inspection results are complete with required signatures.

 Inspection Result

---

**Residential Addition Inspection**  
INSP-2020-00028

---

Result **Pass**

Score 100

---

 Comments 1 >

---

 Attachments 1 >

---

**Signature**

\* **Inspector:** Kaitlyn Haney >  
Signed on: 5/22/20 8:29 AM

---

**Contractor:** Kaitlyn.Haney >  
Signed on: 5/22/20 8:29 AM

---

**Owner:** Kaitlyn.Haney >  
Signed on: 5/22/20 8:29 AM

---

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

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

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

## Performing Offline Mobile Inspections

You can perform mobile inspections using offline functionality in locations where you don't have access to the agency's servers.

When you don't have Internet access while using Oracle Inspector, you still can perform many of your inspection-related tasks. When the Internet connection is restored, your data is synchronized with permits in your agency's system.

The mobile service for Oracle Inspector downloads data to your mobile device for use offline. When your Internet connection is restored, the mobile service sends data about all the performed actions to your agency's Permits Cloud and updates the data in the server. The actions performed offline are transferred, and the changes you made in the offline mode are updated with the changes in the permit application. This way, data in your mobile device browser is synchronized with the permits data.

Notifications on the Inspection Tasks home page let you know the offline status of Oracle Inspector. These are the icons displayed when the offline mode is enabled.

Icon	Description
	Download in Progress
	Download Error
	Synchronization in Progress
	Synchronization Error

### Before You Begin

Your agency determines whether you can work offline. You can also enable or disable the offline mode on your mobile device in **Offline Settings** found in the application menu.

### Data Is Downloaded to Your Device

While you're working online, your inspections for the day are downloaded to your device. The Download in Progress icon notifies you when the mobile service is downloading the data from the agency's server to your mobile device. You must wait for the icon to disappear, indicating the download is complete, before performing actions. Keep the application in the foreground while downloading data to ensure all of the data is downloaded. Don't minimize the application or open another application while data is downloading.

If there's an interruption in network connectivity, the mobile service automatically restarts downloading the data when the network is available again until the download is complete.

Downloaded data is stored for an amount of time determined by your agency. After this time the data will be refreshed, which means more recent data is downloaded the next time you use the application online. Use the **Refresh Data** button to refresh your data if the data has changed since it was last downloaded.

## Perform Inspections While You're Offline

You can view, create, and edit inspection records in the offline mode, and then the mobile service will sync them once the network connection is restored. This includes comments, supporting documents, and required signatures.

If you can't add results, check with your administrator to see if your agency is using a different scoring method. You can also view the permit record and details when you're online to see if a condition has been placed on the permit. Once any issues are resolved and all of the required results and signatures are complete, you can submit the inspection. All of the actions you perform are sent to the agency's server when you're back online.

**Note:** Any features that need to interact with online data, or interact with other applications, are not available offline. These include maps and reports.

## Offline Updates Are Saved

When you are working offline, you can see all of the data that was saved onto the device while you were online. The changes you make will be synchronized to the server when you're back online.

When the application is in offline mode, you can't view any updates that were made by other inspectors or the agency to the inspection data since the application changed to offline mode, because of the absence of a network connection. You can view those data updates only after refreshing the data that is cached.

## Offline Data Is Synchronized

Your data synchronizes automatically every 5 minutes when the device detects a network connection and goes online. You'll see the Synchronization in Progress icon during the synch process.

**CAUTION:** If you disable the offline mode after performing actions and before synchronizing with the agency's servers, you'll lose the work you did offline. Wait until synchronization is complete before disabling the offline mode. Check with your system administrator if you receive persistent errors.

## Resolve Synchronization Errors

If there are problems synchronizing the data, the Synchronization Errors icon appears. Tap the icon to view the Sync Errors page. You can also find a list of inspections that have synchronization issues by accessing the mobile menu item **Offline Sync Status**.

Either you or the inspections supervisor can then go to the **Offline Synch Management** navigation menu accessed through a desktop or laptop to troubleshoot errors for a particular inspection. The error description indicates the problem, which you can fix while online on your desktop or laptop.

For example, you may need to resolve a condition placed on a permit while you were offline, causing a synchronization error. After you've fixed the problem, you can manually synchronize with your mobile device and refresh the data from the error management page.

If you are online and the synchronization is causing errors, you can disable the offline mode on your mobile device in **Offline Settings** found in the mobile application menu, and continue to work online. You'll lose any new work you performed if you disable the offline mode while offline. Check with your system administrator if you receive persistent errors.

## Enable Logging

If you are experiencing issues with offline inspections, your agency's help desk may request that you submit a log file with your help ticket. The log files will provide information to aid the help desk in identifying and troubleshooting any potential issues with the offline processing. You can enable logging in **Offline Settings**. Check the Log Files grid in the **Offline Settings** for the generated log files, which you can view and download to send to your help desk.

### *Related Topics*

- [Managing Mobile Application Offline Settings](#)



# 11 Managing Projects

## Using Projects

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

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

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

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

This example illustrates the Projects page:

Projects

Project	Summary	Contact	Status	Start Date	End Date
Pro-2018-00522 AAA-2018	AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the-art equipment, allowing new offices to just plug and play their systems.	SIMMONS Robert +1 (751) 852-9632	Completed	10-21-15	
Pro-2018-04462 Pro2469	Connuire Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.	Robert M Jacob +1 (751) 852-9562	On Hold	10-04-17	11-20-19
PRO1-OCT2018-4 John Tumac	Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 91-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops.	ALBERT MICHAEL SIMMONS +1 (951) 852-9632	Inactive	09-05-17	11-01-19

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

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

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

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

## Using the Projects Page

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

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

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

## Adding a New Project

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

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

Page Elements	Description
<b>Project ID</b>	Displays the system generated project ID after you save the project.
<b>Name</b>	Enter the name of the project.
<b>Summary</b>	Enter a detailed description of the project.
<b>Type</b>	Select the type of project from the list of options.
<b>Status</b>	Select the status of the project: <ul style="list-style-type: none"> <li>○ Active</li> </ul>

Page Elements	Description
	<ul style="list-style-type: none"> <li>○ Canceled</li> <li>○ On Hold</li> <li>○ Inactive</li> <li>○ Completed</li> </ul>
<b>Estimated Valuation</b>	Enter an estimated amount for the project.
<b>Start Date</b>	Enter the start date for the project.
<b>End Date</b>	Enter the end date of the project.
<b>Primary Contact</b>	<p>Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the <b>Search</b> option.</p> <p>Select the desired contact and use the <b>Select Contact Type</b> option to select the type of contact.</p>

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

## Assigning Transactions to a Project

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

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

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

## Unassigning Transactions from a Project

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

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

## Viewing and Updating Project Details

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

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

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

This example illustrates the Project Details page:

The screenshot displays the Project Details page for a residential development project. The top left shows the project name 'Project Pro-2018-00520 Residential Development Project' and its address '2200 OTIS DR. ALAMEDA US-CA'. A map shows the project location with a red marker. The left sidebar contains navigation links: Overview (selected), Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, and Contacts. The main content area is divided into three sections: Overview, Primary Contact, and Fees and Payments. The Overview section includes the project name 'Harbor Walk', a summary describing the project's transformation, start and end dates, status, primary address, and estimated valuation. The Fees and Payments section features a pie chart titled 'Fees by Transaction' with a legend showing four categories: CC-2018-00003 (29.1%), E25-181005-00001 (28.2%), SP-181005-00004 (22.7%), and PFG-00001-OCT05 (19.9%).

## Using the Overview Page

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

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

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

  - o The Fees and Payments section displays:

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

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

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

## Using the Transactions Page

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

Page Elements	Description
<b>Edit</b>	Click to enable the selection of transactions for removing them from the project. See <b>Unassigning Transactions from a Project</b> under <i>Adding a New Project</i> .
<b>Assign</b>	Click to open the Assign page and select transactions to assign to the project.  See <b>Assigning Transactions</b> under <i>Adding a New Project</i> .
<b>Filter</b>	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
<b>Sort</b>	Sort the list of transactions by: <ul style="list-style-type: none"> <li>○ Date</li> <li>○ Transaction ID</li> <li>○ Status</li> </ul>
<b>Alert icon</b>	Identify transactions with a status affected by a condition or if they are pending submit.
<b>Transaction</b>	Displays the name and description of the transaction.
<b>Status</b>	Displays the status of the transaction.
<b>Created By</b>	Displays the name of the user who created the transaction, with the date and time of creation.
<b>Applicant</b>	Displays the name, email ID, and contact number of the applicant associated to the transaction.
<b>Property</b>	Displays the address of the property for which the transaction is applied.
<b>Fees</b>	Displays the total fees paid and the balance due, if any.
	Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See <i>Navigating to Planning Application Details</i> .

## Using the Inspections Page

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

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

## Using the Fees and Payments Page

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

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

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

## Using the Attachments Page

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

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

Page Elements	Description
<b>File Name</b>	View the following information in the Filename field:

Page Elements	Description
	<ul style="list-style-type: none"> <li>○ Filename with file type extension</li> <li>○ File Size</li> <li>○ Uploaded By user name</li> <li>○ Uploaded On date</li> </ul>
<b>Description</b>	View the description of the attachment as entered by the user who added the attachment.
<b>Category/ Subcategory</b>	<p>View the document category and subcategory for the attachment.</p> <p>This field appears only if a document group is set up on the Project Type Details page while setting up the project type.</p> <p>See <i>Setting Up Project Types</i>.</p>
<b>Actions</b>	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> <li>○ View Details</li> <li>○ Download</li> <li>○ Delete</li> </ul>

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

## Adding Project Attachments

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

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

## Downloading Project Attachments

You download a document on the Attachments page.

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

## Deleting Project Attachments

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

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

## Using the Data Visualization Page

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

## Using the Contacts Page

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

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

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

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

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

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

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

#### Related Topics

- [Applying Conditions to Applications](#)



# 12 Managing Property Information

## Working with Property Attachments

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

### Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.  
| Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. On the Attachments page, view the list of property attachments, including this information:

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

### Adding Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.  
| Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. Click **Add**.
5. Select the file to upload in the browser dialog box and click **Open**.  
The filename appears on the Add Attachments page.

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

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

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

7. Click the **Upload** button.

## Deleting Property Attachments

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

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

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

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

## Applying Conditions to Parcels and Addresses

Agency staff can apply conditions to parcels and addresses so that users interacting with a property are notified of any issues with it.

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

**Note:** : Deleting a property record automatically deletes any associated conditions that are applied to the permit or planning application you are working with. See the section [Deleting a Property](#) under [Working with Property Information](#).

## Applying a Condition to a Parcel

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

Page Element	Description
<b>Condition Name</b>	Select the condition that you want to apply. For more information on conditions, see <a href="#">Setting Up Conditions</a> .
<b>Severity</b>	Displays the level of severity defined for the selected condition. <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all business rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the business rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<b>Business Rules</b>	Select the <b>Prevent New</b> business rule. <p><b>Note:</b> The business rule is available for selection based on the severity of the condition you select. For example, for a condition with a Hold severity you must select the business rule, and for a condition with a Lock severity, the business rule is automatically applied.</p>
<b>Additional Information</b>	Enter additional information for the condition.
<b>Display Message</b>	Displays the message associated with the selected condition.
<b>Priority</b>	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
<b>Description</b>	Displays the description associated with the selected condition. You can edit this text.
<b>Apply Condition to Transactions</b>	Turn on the switch to apply the condition to all the new transactions that will be associated with the selected parcel. <p><b>Note:</b> This switch is available for parcel conditions, but not address conditions.</p> <p>The following business rules are also applied, if selected at the time of applying the condition:</p> <ul style="list-style-type: none"> <li>○ Prevent Workflow Advancing</li> <li>○ Prevent Issue or Final</li> <li>○ Restrict Payment</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ Prevent Inspection Schedule</li> <li>○ Prevent Inspection Result</li> </ul> <p><b>Note:</b> The business rules listed above appear for selection only when the <b>Apply Condition to Transactions</b> option is selected. The condition setup determines whether the this switch is turned off or on by default.</p> <p>For more information on business rules, see <a href="#">Setting Up Conditions</a>.</p>
<b>Include in-process transactions</b>	<p>Select this check box if you want to apply the condition to all the existing transactions related to the parcel. This option appears only if the <b>Apply Condition to Transactions</b> is turned on and is not available for address conditions.</p> <p>You can click the <b>View Impacted Transactions</b> link to view the list of transactions on which the condition will be applied.</p>

4. Click **Save**.

## Resolving a Condition

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

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

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

**Note:** This step applies to parcel conditions, but not address conditions.

5. Click **Save**.

## Modifying a Condition

1. Click **Parcel** or **Property Address** on the Agency Springboard.  
Select a property.  
Click Conditions in the navigation bar.

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

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

4. Click **Save**.



# 13 Managing Contractor Information

## Contractor License Overview

Permit and planning applications can include information about the contractors who perform the work. Agency contractor records help you validate whether contractors have licenses that are active and in good standing.

### Contractor Licenses

Contractor information is stored in your main contractor records, where agency staff creates and maintains the information. Additionally, applicants who are contractors can supply contractor information in permit and planning applications. If an application includes a license number that doesn't yet exist in your main records, submitting the application creates a new contractor record.

If you implement contractor integration, you can validate license information against your state or other external licensing body using the integration capabilities of Oracle Autonomous Integration Cloud (OIC).

Regardless of whether you integrate with an external licensing body, your contractor records include the same type of information. However, integration affects how you view and manage certain information. The following table describes these differences.

Information Type	No Integration	Integration Active
All	<p>Agency staff manually enters or updates license information in the contractor record.</p> <p>Applicants who are not contractors or authorized agents, such as homeowners, can optionally enter license numbers to retrieve information from the contractor records about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant. The other contractor information fields such as the business name and address are not available but can be retrieved when a valid license number is entered.</p>	<p>Agency staff performs a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and re-validation is the only way to update the information. However, system administrators are able to modify contractor information.</p> <p>Applicants who enter a license number in an application can use the same validation process. The validation process checks your contractor records first, and if you don't yet have a record of the license, the process gets information from the licensing body.</p> <p>Applicants who self-identify as contractors must supply a license number. They can't manually enter any other data because the integration process is available to retrieve the information.</p> <p>Other applicants are not expected to know the license number. They can enter license numbers to retrieve information license details from the licensing body, but they can also leave the license number blank. They can't manually enter or update data.</p>

Information Type	No Integration	Integration Active
License status	<p>Agency staff uses the <i>Status</i> field to indicate if a license is active, suspended, expired, and so forth.</p> <p>Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.</p>	<p>The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by re-validating the license number.</p> <p>Your status mapping settings assign a default agency status based on the source status. Agency staff can update the internal status.</p> <p>Your status mapping settings also specify if specific source statuses will prevent applicants from submitting applications. If the application is declined due to the source status, the applicant sees a message explaining that the application can't be submitted. Note that the expiration date is checked regardless of status validation. If the license is expired, the application is declined regardless of the status.</p>
License type	<p>When integration is not enabled, the agency must create a license type for contractor licenses. Set up the license type in the contractor options.</p> <p>Applicants must select this value as the license type when they enter contractor license information in an application.</p> <p>Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p>	<p>License types are not enabled in the contractor options, and applications do not include a license type field.</p> <p>Use license classifications to track the specific types of work that a contractor is licensed to perform.</p>

## Contractor Information in the Intake Form

Applicants who enter contractor license numbers in an application can use the license number to bring additional contractor information into the application. This process initially checks the data in your main contractor records. If you don't have a record of the license number, and you integrate with an external licensing body, the process can retrieve license information from the external source.

If an applicant self-identifies as a contractor, then a license number is required. If integration is active, all other fields are read-only and can be populated only by the process of validating the license number.

Applicants who are not contractors or authorized agents, such as homeowners, can optionally enter license numbers to retrieve information about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant. The other contractor information fields such as the business name and address are not available but can be retrieved when a valid license number is entered.

When an application that includes a license number is submitted, the system creates a new contractor record if there isn't already a record for the specified license number.

When public users review details for submitted applications, they can see the contractor information. As with all other information in a submitted application, the contractor information is read-only.

## Authorized Agents

A contractor’s authorized agents, such as employees or contractors associated with the contracting business, can submit applications on behalf of a contractor. If you include the Authorized Agent field group in an application form, the applicant can self-identify as an authorized agent. Information about self-identified agents is saved to the associated contractor record. Newly identified agents are saved with a status that shows that verification is pending. Agency staff can review the information, update the verification status, and indicate whether the authorized agent is a contractor operating under the contractor license.

Agency staff can’t add authorized agents in a contractor record. Agents are added only when they submit applications where they self-identify as agents.

Agency staff also can’t remove authorized agents from a contractor record. Instead, they mark the verification status as failed.

The list of authorized agents and associated contractors for a contractor record is informational only.

## Managing Contractor Licenses

Agency staff use the main contractor licenses page to enter and maintain information about licensed contractors and their authorized agents.

## Viewing Contractor Licenses

To view the summary information on the contractor list page:

1. Select **Contractor > Contractors**.
2. Review the following summary information:

Page Element	Description
<b>License</b>	Displays the contractor license number and its status.
<b>Dates</b>	Displays the license issue date (or reissue date, if one exists), and the license expiration date.
<b>Business Name</b>	Displays the name of the contractor business.
<b>Address</b>	Displays the address of the contractor business.
<b>License Last Updated</b>	Displays the date that the contractor record was last updated.
<b>Last Reviewed</b>	Displays the date that license information was most recently retrieved from the external licensing body. This field is relevant only if integration is active.

Page Element	Description
<b>Used in Application</b>	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications.</p> <p>When a record is created in the main contractor pages, the initial value is <i>No</i>. The value is <i>Yes</i> if an application referencing this license has been submitted.</p>

3. Use the three-dot **Actions** menu to perform these actions:

Action	Description
<b>Edit</b>	Select this action to access the detail page, where you can update the contractor information, including the status of the license.
<b>Validate</b>	Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.
<b>Delete</b>	Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the <b>Used in Application</b> field.

## Adding Contractor Licenses

To add a contractor license:

1. Select **Contractor > Contractors**.
2. Click **Add**.

The **Add Contractor** page displays the following the read-only information:

Page Element	Description
<b>License Source</b>	<p>Identifies the system-wide contractor options that are active at the time the contractor record is created. These options including settings that determine whether integration is active and which sections of contractor data are shown on the pages that display license information.</p> <p>See <i>Setting Up Contractor License Options</i>.</p>

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. If you do *not* integrate with an external licensing body, enter the following:

Page Element	Description
<b>License Type</b>	<p>Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p> <p>This field is not visible if you integrate with an external licensing body.</p>
<b>Status</b>	<p>Select the license status. Values include <i>Active, Canceled, Expired, Suspended, Other, Revoked, and Inactive</i>.</p> <p>This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses.</p> <p>When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see <a href="#">Setting Up Contractor License Options</a>.</p>

5. If you use integration to get information from an external licensing body:

a. Click **Validate**.

This button is visible only when integration is enabled. The validation process uses the license number to retrieve additional details from the licensing body. When the process finishes successfully, it populates the rest of the fields on the page. It's helpful to note that the **Get Details** button in the application intake and the transaction details also automatically fills in the contractor fields. However, this information comes from the agency's list of contractors that have already been validated. If the contractor isn't in the agency contractor list, and an integration is available, the contractor information comes from the external source.

b. Confirm the license status.

The read-only **Source Status** field displays the status provided by the external licensing body. This value is updated any time you re-validate the license. Your contractor options map the source status to a status that comes from the set of statuses your agency assigns to licenses. If a source status is not mapped to an agency status, the default agency status is *Other*.

6. Enter, update, or review information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Business information includes these fields:

Page Element	Description
<b>Business Name</b>	The name of the contractor business.
<b>Ownership Type</b>	The ownership structure for the business, such as <i>Sole Proprietor</i> or <i>Partnership</i> .

Page Element	Description
<b>Postal Code</b>	<p>The business address. The <b>Country</b> field displays US.</p> <p>As you enter a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.</p> <p>If you don't know the postal code, click the <b>Don't know</b> link to display a full set of address fields.</p>
<b>Phone</b>	The phone number for the business.
<b>Issue Date</b>	The date that the license was originally issued.
<b>Reissue Date</b>	The date that the license was reissued after a period of inactivity.
<b>Expire Date</b>	The date that the license expired or is due to expire.

7. Enter, update, or review additional information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Your system-wide contractor options determine what additional information is available and how it is labeled. If the agency displays all available information using the default labels, these sections appear:

Section Name	Description
<b>Classifications</b>	<p>License classifications indicate the type of work that the contractor is licensed to perform.</p> <p>This grid lists a <b>Code</b> and a <b>Description</b> for each classification.</p> <p>If integration is not active and the fields are editable, selecting a code displays the associated description.</p>
<b>Contractor Bond</b>	Contractor bond information includes the <b>Company Name</b> (the bond issuer), <b>Policy Number</b> , <b>Amount</b> , <b>Effective Date</b> , and <b>Cancellation Date</b> .
<b>Other Bonds</b>	Information for other bonds includes a <b>Qualifier Name</b> (the name of the qualifying individual on the bond) and the same fields that appear for contractor bonds.

Section Name	Description
<b>Workers Compensation</b>	Workers compensation information includes the <b>Coverage Type</b> (which can be <i>Exempt</i> ), <b>Company Name</b> , <b>Policy Number</b> , <b>Effective Date</b> , <b>Expiration Date</b> , <b>Cancellation Date</b> , and <b>Suspend Date</b> .

8. To clear all information and start fresh, click the **Clear** button and go back to the step where you enter a license number.
9. Click **Save**.

The Add Contractor page closes after you save.

The next time you access the details for this contractor, the detail page displays two tabs: The **License Information** tab displays the information you entered when you added the contractor. The **Associations** tab lists any users who submitted applications where they self-identified as the contractor or as an agent for this contractor.

## Modifying License Information

To modify the license information for a contractor:

1. Select **Contractor > Contractors**.
2. Locate and click the row that you want to modify.
3. Make your updates:
  - o Update the **Status**.
  - o If integration is active, click the **Validate** button to retrieve the most recent contractor information and update the license detail fields.
 

System administrators can update data manually even when integration is active.
  - o If integration is not active, manually modify the contractor information as needed.
4. Click **Save**.

## Managing Authorized Agents

Authorized agents are added when an applicant self-identifies as an agent for a licensed contractor. There can be multiple applicants who self-identify as agents for the same contractor. The agent's name and contact information are copied from the applicant's account profile and added to the list of authorized agents in the **Associations** tab of the contractor record.

You can't manually add authorized agent information for a license, but you can verify agents and update an agent's verification status depending on the results. Only verified agents are marked as active. Agents who are pending verification or whose verification failed are marked as inactive.

To manage authorized agents for a license:

1. Select **Contractor > Contractors**.
2. Locate and select the contractor license.
3. Click the **Associations** link to access the tab with authorized agent information.
4. Review the following information:

Page Element	Description
<b>Agent</b>	Displays the authorized agent's name, email, and phone.
<b>Business</b>	Displays the business name from the contractor license details.
<b>Type</b>	Displays the relationship this person has to the contractor license: <ul style="list-style-type: none"> <li>○ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license.</li> <li>○ <i>Contractor</i>: A person who is a contractor operating under this license.</li> </ul>
<b>Address</b>	Displays the authorized agent's address.
<b>Association</b>	Displays <i>Active</i> if the agent has been verified.  Displays <i>Inactive</i> if verification is pending or the verification has failed.

5. Click a row to access agent details.
6. Update the **Verification Status** by selecting *Verified*, *Pending verification*, or *Verification failed*.

The default status for an agent who submits an application is *Pending verification*.

7. Update the **Association Type** by selecting *Authorized Agent* or *Contractor* to indicate how the person is associated with the licensed contractor.
8. The **Last Reviewed Date** displays the date when the authorized agent information was last reviewed.
9. Make any necessary changes to the agent's personal information or contact information.

The default values are copied from the applicant section of the intake form where the applicant self-identified as an authorized agent. You can update everything except the agent's name.

10. Click **Save**.

The detail window closes and your changes are saved. If you changed the verification status, the system also updates the **Association** field on the agent list and the **Last Reviewed** field on the agent detail page.

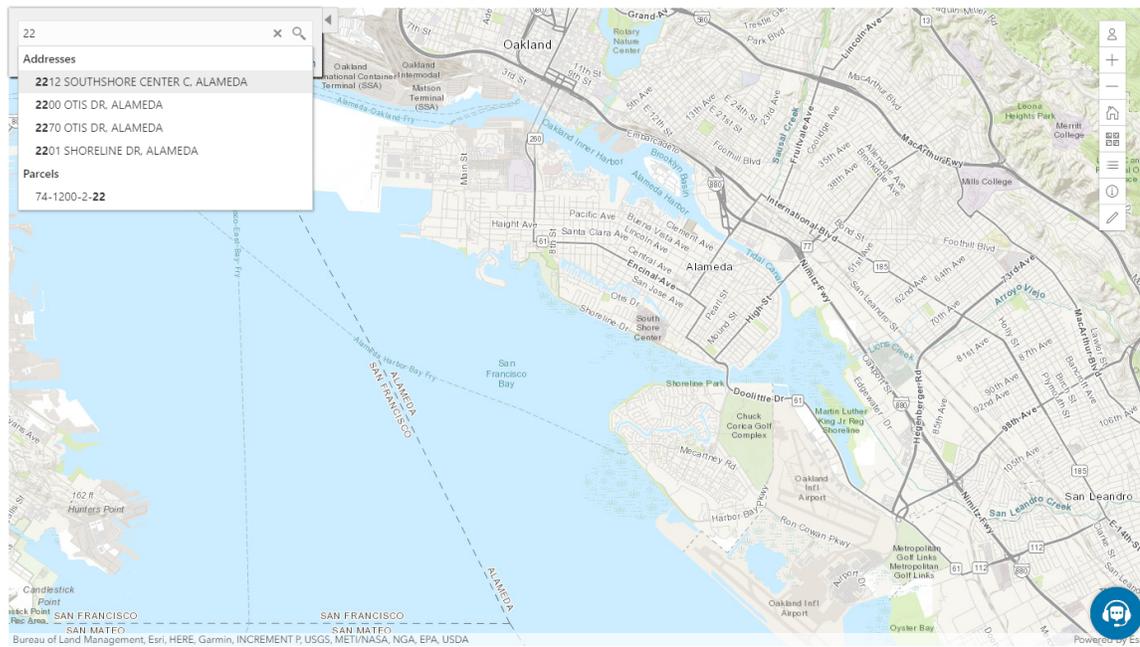
# 14 Working with Maps

## Overview of Delivered Maps

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

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

This example shows the main map that agency staff uses to see properties and transactions.



The following tables describe the delivered maps in the Oracle Public Sector system.

### Main Maps

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

Map Name	Users	Navigation	Usage
Agency main map	Agency staff	Click the Map icon in the page header, then click <b>Main Map</b> in the drop-down menu that appears.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> </ul>

Map Name	Users	Navigation	Usage
			<ul style="list-style-type: none"> <li>View transactions for a selected property.</li> <li>Start new applications for selected properties.</li> <li>Access an interactive guide for selecting application types.</li> </ul>
Guest/anonymous user map	Anonymous public users	Guest users click the <b>Explore Your City</b> tile on the landing page.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> <li>View transactions for a selected property.</li> <li>Access an interactive guide for selecting application types.</li> </ul> <p>An anonymous user who attempts to start an application is required to register or sign in first.</p>
Registered public user map	Registered public users	Registered public users click the <b>Explore Your City</b> tile on the landing page.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> <li>View transactions for a selected property, and filter transactions so that only the user's own items appear on the map.</li> <li>Start new applications for selected properties.</li> <li>Access an interactive guide for selecting application types.</li> </ul>

## Additional Maps for Applications

This table lists additional maps that support applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the <b>Property</b> section of a new or submitted application, then click the <b>Map View</b> icon.	Choose the property to associate with the application.  See <i>Working with Property Information</i> .
Mobile inspection	Agency staff	Use the Oracle Inspector mobile application.	View permits and planning applications on a map.

Map Name	Users	Navigation	Usage
			See <a href="#">Overview of Mobile Oracle Inspector for Permits</a> .
Permit list	Agency staff Registered public users	For agency staff: access the application lists on the <b>Transactions</b> page.  For registered public users: access the application lists on the <b>Applications</b> page.  On any of these pages, click the <b>Map View</b> icon.	View the locations of the transactions on the list.  See <a href="#">Managing Transactions</a> .
Public notification	Agency staff	<ul style="list-style-type: none"> <li>Click the Map icon in the page header, then click <b>Public Notification</b> in the drop-down menu that appears.</li> <li>From the Planning Application detail page, select a hearing where the schedule is final, then select the <b>Actions</b> button and choose <b>Generate Notifications</b> from the menu that appears.</li> </ul>	Create a notification zone by specifying a distance from selected parcels.  After creating a notification zone, download .csv files with parcel, address, and owner information for all parcels that are at least partially within the zone.  See <a href="#">Creating Map-Based Public Notification Lists</a> .

## Maps for Code Enforcement

This table lists additional maps that support code enforcement:

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

Map Name	Users	Navigation	Description
Public - code enforcement	Registered and anonymous public users	On the code enforcement landing page, click the <b>View Recent Issues</b> tile.	View recent code enforcement issues.  See <i>Viewing Recent Issues</i> .

## Maps in Transaction Headers

This table describes the map that appears in transaction headers:

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

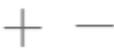
## Using the Map Toolbar

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

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

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

Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options.  When you click this icon, a list of map profiles appears. The list displays the profile name and a thumbnail image of the map that illustrates its general appearance.

Image	Name	Configuration	Description
	Zoom In and Zoom Out	Use the <b>Enable Zoom</b> switch on the map profile.	Use these tools to zoom in or out.  You can also double-click a map location to zoom in.
	Show Default Map View	Use the <b>Enable Default Map View</b> switch on the map profile.	Click to restore the map to its default (home) display area.
	Select Base Map	Use the <b>Enable Base Map Gallery</b> switch on the map profile.	Click to display a pop-up window for selecting a map type such as <i>Streets</i> or <i>Topographic</i> .
	Select Layers	Use the <b>Enable Map Layers</b> switch on the map profile.	Click to display a pop-up menu for changing the visibility of various map layers. Examples of layers include the parcel layer and address layer provided by the map service.
	Show Attribution (for maps in page headers)	This toolbar button is not configurable. Some maps have this button, while other maps, such as Explore Your City, display attribution information across the bottom of the map page.	Click to display a pop-up window that identifies the third-party map sources.
	Identify GIS Information (for maps that are not in page headers)	This tool appears if the <b>Enable Map Layers</b> switch is on and the map service URL for the profile is configured to allow the display of object details on the map.	Click to enable the display of object details for map objects (such as parcels) that you click. Details appear in a pop-up window. To stop displaying object details, click the button again to turn off the option to identify GIS information.  The map profile settings for <b>Enable Window Detail Docking</b> and <b>Detail Window Dock Position</b> control where the object detail window appears. However, on mobile devices, the detail window always appears at the bottom of the screen..
	Show Selection Tools or Hide Selection Tools	Use the <b>Enable Selection Tools</b> switch on the map profile.	Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map.

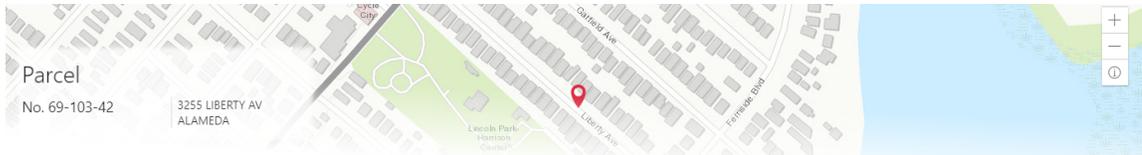
## Viewing Map Markers

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

## Marker on the Transaction Header Map

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

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

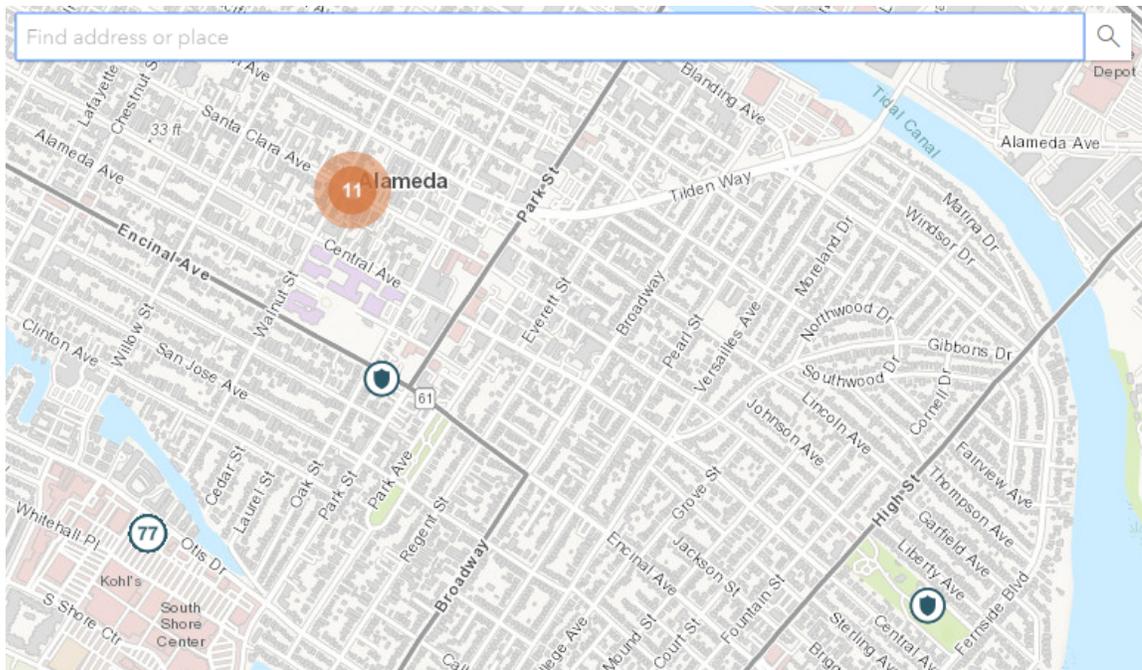


## Other Map Markers

Maps other than the ones in transaction headers have these markers:

- Transaction-specific icons to mark the locations of single transactions.
- Numbered circles to mark locations with multiple transactions.
- Orange-shaded double circles to represent multiple neighboring locations that are clustered together because of the map zoom level.

This example is from the View Recent Issues map, where map markers represent code enforcement issues.



The following table provides a key to the marker icons:

Map Marker	Description
	The location has a single code enforcement issue.

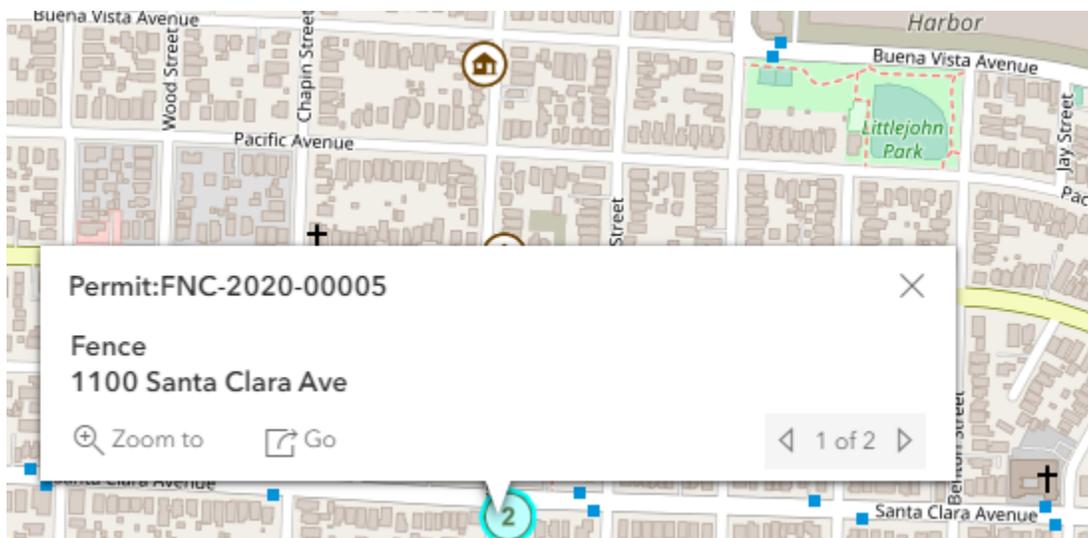
Map Marker	Description
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions.  The marker is the same color as it would be for a single transaction. For example, the marker is brown for multiple business licenses.

## Viewing Details for a Marker

Clicking a marker displays a pop-up window with additional details.

**Note:** If the selection toolbar is visible and a selection tool is active, clicking a marker selects the location rather than opening the details pop-up.

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



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

- The object ID

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

- The object status.

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

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

- The address for the location.

- Controls for paging through multiple objects, if applicable.

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

- A **Zoom To** icon for zooming in on the map location.
- A **Go** icon for opening the corresponding detail page in a new window.

## Using the Main Map and Explore Your City Map

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

With these maps, users can do the following:

- Select a property and view existing transactions for that property.
- Start an application for a selected property (public users and agency staff only).

Users who aren’t sure what type of application is needed can launch the guide that provides recommendations based on questionnaire answers.

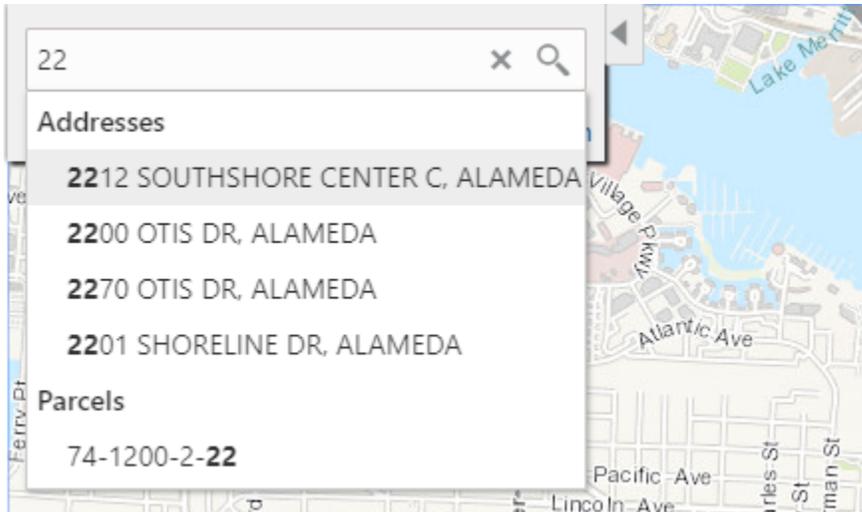
- Search for transactions and view transaction markers on the map.

All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user’s own transactions appear.

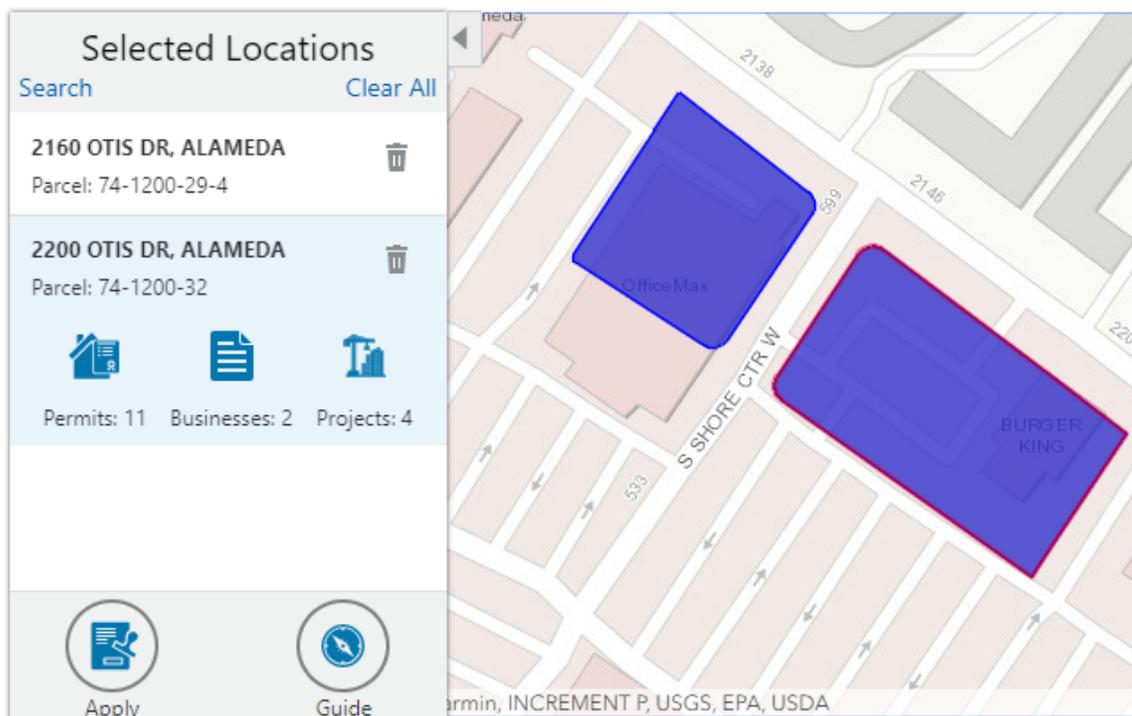
**Note:** To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience. See [Setting Up Map Profiles](#).

## Selecting Properties Using the Basic Search

This example illustrates the basic property search on the map.



This example illustrates the map when properties have been selected.



To search for properties and select them:

1. Enter a full or partial address or parcel number in the search field that appears when you first access the map.

As you type, up to five matching addresses and parcels appear in a type-ahead drop-down list. The type-ahead list includes headings to indicate which items are **Addresses** and which are **Parcels**.

2. Press the Return key or click the magnifying glass icon to perform a full search.

The Search window expands to show lists for Addresses and Parcels with a count for each type of result. Initially a maximum of five items appears in each list.

If more results exist, click **More** to show all results in a scrolling list. When the list is expanded, click **Less** to shrink the list back down to five locations.

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

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

- To select additional properties without losing your selection, click the **Search** link to re-display the search field.

Each time you select a property, it is added to the Selected Locations list.

To return to the Selected Locations overlay from the Search overlay without performing a search, click the **Selected Locations** link. This link appears if at least one property is selected.

- Use these options to deselect properties:

Page Element	Description
<b>Delete</b>	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
<b>Clear All</b>	Click this link to deselect all properties. The link appears at the top of the list.

## Selecting Properties Using the Selection Toolbar

To select properties directly from the map, without searching, use the drawing tools. You can use the search and the drawing tools together to add properties to (and remove properties from) your list.

To select and deselect properties using drawing tools:

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

The drawing toolbar appears.

- Use these tools to make your property selection:

Selection Toolbar Button	Description
 Draw a Point	Click one or more points on the map to select the properties that contain the points.
 Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All properties that intersect the resulting polyline are selected.

Selection Toolbar Button	Description
 Draw a Polygon	Click three or more points on a map to draw a polygon. The system redraws the polygon after each click. Double-click on the final point to stop drawing. All properties that are at least partially within the resulting polygon are selected.
 Deselect One	Click a selected property to deselect it.  <b>Note:</b> Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.
 Deselect All	Click this button to deselect all properties.
 Close	Click to close the toolbar.

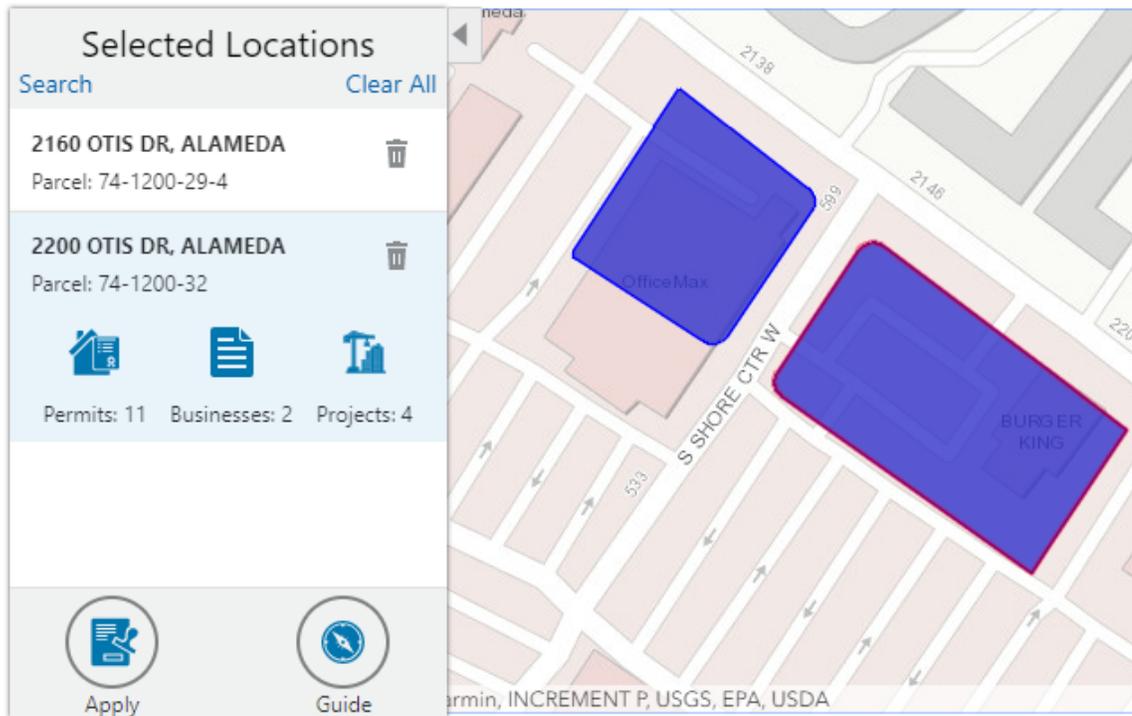
3. Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever properties are selected. This is a single list that also includes properties that you adding using the search.

## Using the Selected Locations List

The Selected Locations overlay enables you to review information about selected properties and the transactions that are associated with those properties.

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



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address. Agency staff can access the detail pages for selected addresses and parcels by clicking the address or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.

**Note:** If an address has multiple parcels, each parcel appears on a separate card and all parcels are selected on the map. If a parcel has multiple addresses, a link below the parcel number indicates the number of addresses. Click the link to see a list of addresses.

2. Click a card to select it and learn more about the property.

If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits**, **Planning Applications**, **Businesses** (business licenses), and **Projects**. The icon label includes a count of the related transactions. If the property is not associated with any transactions, the selected card looks the same as it does when it's collapsed.

3. Click the icon for a specific transaction type to access a list of transactions.

The list replaces the Selected Locations list and shows details that are relevant to the specific transaction type.

4. On the transaction list, click a transaction to open a new window with the corresponding detail page.

The details are read-only for public users. For agency users, access is based on the user's security. The window does not have any navigation controls, so close the window when you're done.

5. From a transaction list, click the return button in the window header to go back to the Selected Locations list.
6. To start an application for the selected properties, click the **Apply** button (not available to anonymous users).

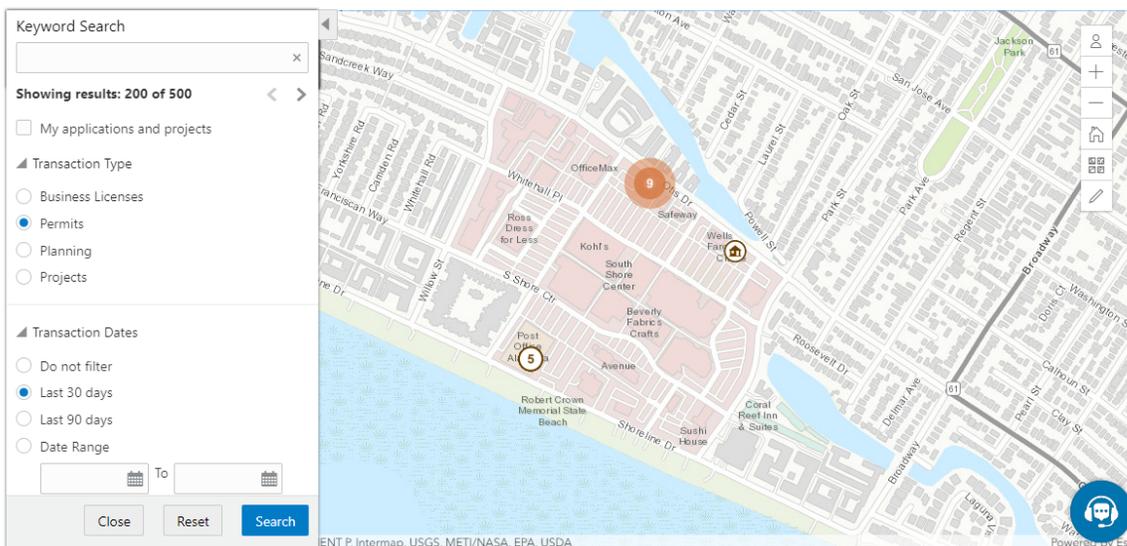
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

Users who aren't sure what type of application is needed can click the **Guide** button instead. This launches the guide that provides application type recommendations based on questionnaire answers. The Guide button is available only if an Oracle Intelligent Advisor definition is associated with the agency record.

## Using Advanced Search to View Transactions

The advanced search is for searching transactions rather than properties. Use the advanced search to view map markers that indicate the locations of business licenses, permits, planning applications, and projects.

This example illustrates the advanced search.



**Note:** As agency staff, you will not see the check box used by registered public users to limit the search to their own transactions. If the registered public user is a primary contact for any projects, the check box label is **My Applications and Projects**. If the registered public user isn't a primary contact for any projects, the label is **My Applications**.

To show transactions on the map:

1. Click the **Advanced Search** link on the basic search overlay.

A new overlay appears.

2. Enter search keywords, if any, in the search field at the top of the overlay.

Search on data such as a business name or permit type. Don't use this field to search for addresses; use the basic search instead.

3. In the **Transaction Type** section, indicate which type of transaction to search.

Depending on which product offerings you enable, you can search for **Business Licenses**, **Permits**, **Planning** (planning applications), or **Projects**.

4. In the **Transaction Dates** section, choose a date range to search.

Options include **Do not filter**, **Last 30 days**, **Last 90 days**, or a custom **Date Range**. If you use a custom date range, enter a start date, end date, or both to define the range.

For date-restricted searches:

- The application submission date must fall in the specified time period.
- A project start date must be after any start date you specify. If you use a custom date range with an end date, the project end date must be before any end date you specify.

5. Click **Search** to perform the search.

Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.

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

6. To clear search criteria, click **Reset**.

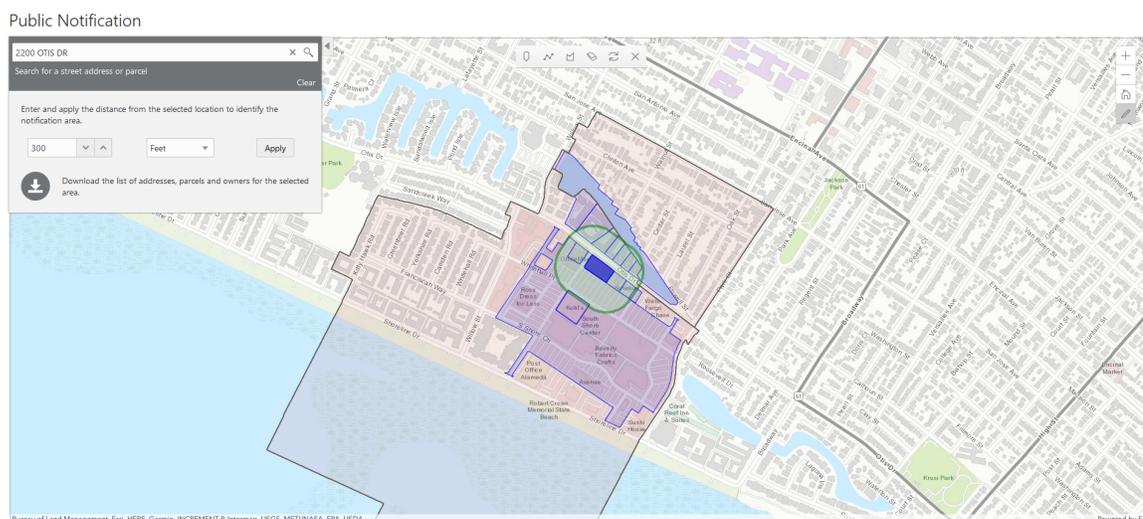
7. To close the advanced search and return to the simple location search, click **Close**.

## Creating Map-Based Public Notification Lists

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

A context-specific instance of this page is available for scheduling hearing notifications. See [Generating a Hearing Notifications List](#).

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



To define a notification area and generate notification lists:

1. Access the Public Notification page.

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

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

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

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

The two methods for selecting properties are:

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

For detailed information on selecting properties, see [Using the Main Map and Explore Your City Map](#)

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

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

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

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

4. Click **Apply**.

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

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

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

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

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

Three files are downloaded: *Address.csv*, *Owner.csv*, and *Parcel.csv*. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, a fourth file is downloaded: *Neighborhood Group Mapping.csv*.

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

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

The notification process is not part of the Oracle system.

# 15 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 *Implementing Your Financials Framework*.

## 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. They can also make full or partial fee payment on behalf of the applicant on the Fees and Payment page.

## 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.

The applicant must have a PayPal account before selecting PayPal as a payment method.

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, planning application, or business license listed on the Transactions page or on the Fees and Payments page in the application details.
2. On the Pay Fees page, review the list of fee items and the total payable fee. If you want to make a partial payment, deselect the *Select All* check box to clear the check boxes for all the fee items and then select individual items. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.
3. Click the **Continue** button.
4. Review the Checkout page, which lists the different payment methods available, such as cash or credit card.
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 agency user is returned to the Transactions list page. The fee item records are now updated.

## Payment Cart Overview

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

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

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

## Viewing Fees in the Payment Cart Summary

The payment cart icon appears in the global header when a registered user logs in. The number of items in the payment cart, if any, appears on the icon:

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



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

This example illustrates the Payment Cart summary page.

## Payment Cart



View Cart

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

Total Amount 75.00 USD

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

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

## Paying Fees in the Payment Cart

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

This example illustrates the Cart page.

Cart

The screenshot shows a 'Cart' page with a 'Continue to Checkout' button in the top right. Below the button are sorting and grouping icons. The main content area displays a list of items with the following details:

- Item 1:** ZPER-FEN-2018-00044 (All projects: 3), 600.50 USD. Includes details for TESTER123, 5815 Owens Drive, City of San Francisco, added 3 days ago. A 'Pay Now' toggle is checked, and there is a 'Remove from Cart' link.
- Item 2:** ZPER-FEN-2018-00059, 0.00 USD. Includes details for ZPERRecordType, 5815 Owens Drive, City of San Francisco, added 2 days ago. A 'Pay Now' toggle is checked, and there is a 'Remove from Cart' link.
- Item 3:** ZPER-FEN-2018-00062, 0.00 USD. Includes details for ZPERINIV-2018-0000000052, Pro-1563125748-2. A 'Pay Now' toggle is checked, and there is a 'Remove from Cart' link.

Page Elements	Usage
	Click to sort the fees by <i>Added Date</i> , <i>Application Type</i> , or <i>Application</i> .
	Click to group the fees by <i>Address</i> or <i>Application Type</i> .
<b>Total Amount</b>	Review the number of items to pay now and the total amount selected for payment.

Page Elements	Usage
<Application number>	Each item in the payment cart is identified by the application number. Click the application number to open a page with the application details.
	The Projects icon appears after the application number if the application is part of at least one project. If the application is part of exactly one project, the icon is followed by the project identifier and name. If the application is part of multiple projects, the text <i>All projects: &lt;number of projects&gt;</i> appears. Click this text to see a pop-up window that lists the identifiers and names of all of the projects.
<Application type>	The information for an item in the cart includes the type of application, such as <i>Residential Addition</i> .
<Fee amount>	The information for an item in the cart includes the fee amount. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees for the application.
	The Fee Amount Changed alert indicates the fee has been adjusted. Adjusted fees are updated automatically in the cart before checkout processing.
Property address	View the location of the property for the item in the cart.
Aging information	View the aging information for the item in the cart, for example: <i>Added 5 days ago</i> .

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

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

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

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

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

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

## Working with Cashier Sessions

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

### Opening a Cashier Session

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

Page Element	Description
<b>Cashier Drawer ID</b>	Select the cash drawer that you want to use for this session.
<b>Session ID</b>	Displays the unique, system-generated ID for the cashier session.
<b>Start Time</b>	Displays the date and time the session was created.
<b>Status</b>	All new cashier sessions have a status of <i>Open</i> .
<b>Cashier ID</b>	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.
<b>Opening Balance</b>	Enter the amount in the cash drawer at the beginning of the cashier session.

4. Click **Save**.

### Modifying a Cashier Session

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

This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See *Setting Up Agency Payment Options*.

- o Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

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

4. Click **Save**.

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

## Reconciling Cashier Sessions

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

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

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

This example shows the Reconcile Cashier Session page.

Reconcile Cashier Session Cancel Save Reconciliation Complete Reconciliation

Cash Drawer ID: Cash Drawer 01      Session ID: 1022  
 Start Time: 9/29/18 3:26 AM      End Time: 8/8/19 11:25 PM  
 Status: Closed      Reconcile Status: Unreconcile

Payment Information

Payment Method	Currency	Opening Balance	Recorded Amount
Cash	USD	100	93.5
Personal check	USD	0	67

Comments

## Reconciling Recorded and Actual Amounts

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

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

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

This example shows the Payment Details page.

The screenshot shows a 'Payment Details' window with a 'Payment Summary' section and a 'Payment Details' table. The summary includes fields for Payment Method (Cash), Currency (USD), Opening Balance (100), Recorded Amount (93.5), Actual Amount (192.25), Total Overage (0), and Total Shortage (1.25). The table below has columns for Receipt Number, Receipt Line Number, Recorded Amount, and Actual Amount.

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

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

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

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

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

## Printing a Cashier Session Reconciliation Report

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

3. Complete the reconciliation for the cashier session if you haven't already. You can print reconciliation reports only for sessions with a **Reconcile Status** of *Reconcile*.
4. Click **Print Report**. The generated report opens in a separate browser tab.

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

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

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

For more information on defining parameters for reports, see [Setting Up Reports](#).

## Generate Accounting Entries for Reconciliation Overages and Shortages

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

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

## Printing Deposit Slips

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

You print deposit slips using the Print Deposit Slip page.

### Prerequisites

Before you generate deposit slips for your agency, you must define the P\_DEPOSIT\_SLIP\_NUMBER parameter for the Deposit Slip (DepositSlip001) report. For more information on defining report parameters, see [Setting Up Reports](#).

## Generating Deposit Slips

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

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

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

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

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

## Viewing Payment History

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

This example shows the Payment History page.

Payment History

Payment Method	Payment Reference ID	Payment Transaction ID	Receipt Date	Amount Paid	Currency	First Name	Last Name	Record ID	Record Type
Credit card	EPAY_20201104T0621214462357074	43558	11/4/20	10,160.57	USD	Peter	Skate	STBL-2020-0051	BLQANATAACCLASS6 >
Credit card	EPAY_20201104T0649530642566803	43562	11/4/20	10,160.57	USD	Peter	Skate	STBL-2020-0052	BLQANATAACCLASS6 >
Credit card	EPAY_20201104T0330223032716275	43550	11/4/20	9,929.00	USD	Peter	Skate	STBL-2020-0043	BLQANATAACCLASS6 >
Credit card	CRCD_20201104T073041074Z887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPER-FEN-2020-00429	PMTQAFFEREAL >
Credit card	CRCD_20201104T073041074Z887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPZ-SITE-2020-00215	PMTQAFFEREAL >
Credit card	EPAY_20201104T1432518402789051	43617	11/4/20	823.56	USD	Peter	Skate	ZPER-FEN-2020-00670	PaymentBNP >
Credit card	EPAY_20201104T0950510042791445	43597	11/4/20	2,860.00	USD	Peter	Skate	ZPER-FEN-2020-00635	PaymentBNP >
Credit card	CRCD_20201104T073041074Z887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPER-FEN-2020-00271	PMTQAFFEREAL >

Page 1 of 12 (1-B of 89 items) | < 1 2 3 4 5 ... 12 > | Show Default

## Reviewing Payment History

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

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

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

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

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

This example shows the Payment History Details page.

Payment History Details Cancel

Payment Method Debit card

Payment Reference ID DRCD\_20201104T1222090822056247

Payment Transaction ID 43605

Receipt Date 11/4/20

Amount Due 823.56

Amount Paid 823.56

Currency USD

First Name Peter

Last Name Skate

Receivables Receipt Status Created

Payment History Lines

Line	Item Description	Item Amount	Item Currency
1	Application Fee	823.56	USD

Refund History

Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Processed Date
11/4/20	823.56	USD	Refunded	11/5/20

If your agency is integrated with Oracle Receivables, but the **Receivables Receipt Status** for a payment is *Error*, the **Generate Receipt** button appears on this page. Once you correct the source of the error, click **Generate Receipt** to manually create a miscellaneous receipt for the payment and send it to Oracle Receivables. For more information on the integration with Oracle Receivables, see [Oracle Receivables Integration Overview](#).

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

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

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

The Refund History grid displays any refunds associated with the payment. You can select a refund to view additional details on the Refund Detail modal page. For more information on refunds, see [Viewing and Processing Refunds](#).

## Viewing Invoice History

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

This example shows the Invoice History page.

Invoice History

Download Search

Invoice	Invoice Date	Person Name	Invoice Amount	Invoice Currency
E2E-190830-00001	8/30/19	Alden Richards	148.80	USD
E2E-190830-00002	8/30/19	Carl Jones	148.80	USD
E2E-190830-00003	8/30/19	Alden Richards	148.80	USD
E2E-190830-00004	8/30/19	Alden Richards	148.80	USD
E2E-190830-00005	8/30/19	Alden Richards	148.80	USD
E2E-190830-00006	8/30/19	Carl Jones	148.80	USD
E2E-190830-00007	8/30/19	Alden Richards	148.80	USD
E2E-190830-00008	8/30/19	Alden Richards	148.80	USD

Page 1 of 12 (1-8 of 91 items) 1 2 3 4 5 ... 12 Show Default

## Reviewing Invoice History

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

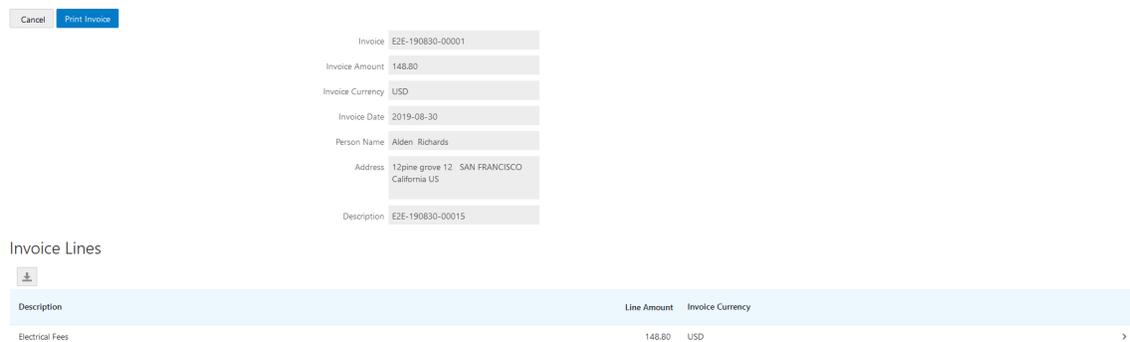
**Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting *View Invoice History* from the **I Want To** field. Public users can view only their own invoices.

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

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

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

This example shows the Invoice History Details page.



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

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

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

## Viewing and Processing Refunds

Agency staff can view refund history, process refunds, and print refunds from the Refund History page.

Agency staff initiate refund requests from the Fees and Payments page for transactions. For more information on initiating refund requests, see *Working with Fees and Payments*.

To distribute requested refunds to customers, agency staff must review and process them on the Refund History page.

This example shows the Refund History page.

Refund History

Refund ID	Refund Type	Refund Method	Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processed Date
RFND_20191217T101050000299540	Chargeback	Credit card	12/17/19	145.00	USD	Refunded	Cancel	2019-12-17T10:12:32.060+00:00
RFND_20191217T0807440000265030	Refund	Offline	12/17/19	111.00	USD	Refunded	Cancel	2019-04-15T00:00:00+00:00
RFND_20191217T242480000295571	Refund	Offline	12/17/19	111.00	USD	Refunded	Paid in error	2019-12-18T23:34:07.520+00:00
RFND_20191217T0641370000224132	Refund	Offline	12/17/19	123.00	USD	Refunded	Duplicate payment	2019-12-18T23:32:45.897+00:00
RFND_20191217T0936310000201719	Chargeback	Credit card	12/17/19	12.00	USD	Failed	Cancel	2019-12-17T09:38:01.582+00:00
RFND_20191217T0936310000260439	Refund	Offline	12/17/19	100.00	USD	Pending	Duplicate payment	
RFND_20191217T0828520000280097	Refund	Offline	12/17/19	300.00	USD	Refunded	Excess paid	2019-12-17T00:00:00+00:00
RFND_20191217T0732210000223043	Refund	Offline	12/17/19	111.00	USD	Refunded	Duplicate payment	2019-12-17T07:34:05.522+00:00

Page 1 of 16 (1-8 of 128 items) | 1 2 3 4 5 ... 16 | Show Default

## Reviewing Refund History

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

The Refund History page displays all of the requested or processed by the agency. You can search for and sort refunds by:

- Refund ID
- Refund Type
- Refund Method
- Refund Request Date
- Refund Amount
- Refund Currency
- Refund Status
- Refund Reason
- Refund Processed Date

2. Select a refund to view additional details on the Refund Detail page.

This example shows the Refund Detail page.

Cancel Process Refund

Refund ID: RFND\_20191217T0936310000260439

Refund Type: Refund

\* Refund Method:

Refund Request Date: 2019-12-17

Refund Amount: 100.00

Refund Currency: USD

Refund Status: Pending

\* Refund Reason:

Payment Method: Trust account

Payment Reference ID: TRSA\_20191217T0826376482478731

Refund Processed Date:

Refund Transaction ID:

---

Refund Lines

Item Name	Item Description	Item Refund Amount	Item Refund Currency
300100185078326	APPLICATION	100	USD

The Refund Lines grid displays the items included as part of the refund. You can select a refund to view additional details on the Refund Detail modal page.

## Processing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.
3. On the Refund Detail page, select a **Refund Method**.

Select *Offline* if you are issuing a manual check for the refund, or issuing an electronic refund through a system that is not connected to Oracle Public Sector Compliance and Regulation. This is the only option available for payments that were made by check or cash.

Select *Credit Card* to credit the refund back to the credit card that was used to make the payment.

Refunds to credit cards are processed through Oracle Fusion Payments. For detailed information on setting up the integration with Oracle Fusion Payments, see *Public Sector Compliance and Regulation: Financial Integrations*.

**Note:** Cashiers processing refunds charged back to credit cards must have the Accounts Receivable Manager Segregated Role (ORA\_AR\_ACCOUNTS\_RECEIVABLE\_MANAGER\_SOD\_JOB) assigned to them. For more information on assigning roles to agency staff, see *Setting Up Agency Staff*.

4. Click **Process Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Refunded* and enters the date and time that the refund was processed in the **Refund Processed Date** column. In addition, the process creates an accounting entry for the refund.

If you configure a template for the delivered Refund Notice communication event, processing the refund triggers the generation of a communication to the refund recipient. For more information on communication event templates, see *Setting Up Communication Templates*.

**Note:** If an error occurs before or after a refund is process, the system changes its status to *Failed*. To prevent duplicate refunds from being processed agency staff cannot process a failed refund. You must set the refund status back to *Pending* through a patch request before attempting to process the refund again.

## Printing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Refunded*.
3. On the Refund Detail page, click **Print Refund** generate a printable PDF file for the refund in a separate browser tab.

## Viewing Payments On Account

Agency staff can view payments on account on the Payments on Account page.

This example shows the Payments on Account page.

Payments on Account

On Account Reference ID	First Name	Last Name	Payment Transaction ID	On Account Date	On Account Amount	Currency	On Account Status
OVPI_20201029T1647480000Z8778E	OATS	Auto	1301	10/29/20	100.00	USD	Unapplied
OVPI_20201030T2133180000Z1662E	test	psrPlanReview	1314	10/30/20	23.82	USD	Unapplied
OVPI_20201102T0604360000Z636E	OATS	Auto	1317	11/2/20	100.00	USD	Unapplied
OVPI_20201102T0624450000Z117E	OATS	Auto	1318	11/2/20	100.00	USD	Unapplied
OVPI_20201024T163630000Z9351E	Peter	Skate	1237	10/24/20	200.00	USD	Unapplied
OVPI_20201028T0521120000Z906E	Peter	Skate	1273	10/27/20	200.00	USD	Unapplied
OVPI_20201022T257280000Z9927E	OATS	Auto	RECT-2020-10003	10/22/20	200.00	USD	Unapplied
OVPI_20201025T1639520000Z0752E	OATS	Auto	1247	10/25/20	200.00	USD	Unapplied

Page 1 of 3 (1-8 of 21 items) | < 1 2 3 > X Show Default

## Reviewing Payments on Account

1. Select **Billing and Payment > Payments on Account** in the navigator.

The Payment on Account page displays all of the payments on account resulting from cash drawer overpayments. You can search for and sort the payments by:

- On Account Reference ID
- First Name
- Last Name
- Payment Transaction ID
- On Account Date
- On Account Amount
- Currency
- On Account Status

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

This example shows the Payment on Account Details page.

Payment on Account Details Cancel

On Account Reference Id OVPI\_20201024T163630000Z9351E

Payment Reference ID CASH\_1603557353921

Payment Transaction ID 1237

First Name Peter

Last Name Skate

Amount Due 200.00

Amount Paid 400.00

On Account Date 10/24/20

On Account Amount 200.00

Currency USD

On Account Status Unapplied



# 16 Working with Accounting

## Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

### Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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

## Generating Journal Entries

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

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

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

### Entering Generate Accounting Process Parameters

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

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

## Scheduling the Process

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

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

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

## Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## Reviewing Journal Entries

You view and edit journal entries on the Journal page.

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

## Viewing Journal Entries

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

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

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

## Reviewing Accounting Lines

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

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

## Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.

You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

## Exporting Journal Entries

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

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

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

## Entering Export Journals to ERP Process Parameters

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

Page Element	Description
<b>Mapping Name</b>	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see <a href="#">Setting Up Data Format Exchange Maps</a> .
<b>All Open Periods</b>	Select to include journals for all open accounting periods.
<b>Specify Dates</b>	Select to include journals for a specific accounting date range.
<b>Accounting Date From</b> and <b>Accounting Date To</b>	Specify the range of accounting dates for which you are exporting journal entries.
<b>Select Ledgers</b>	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
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>

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

## Setting Up Process Notifications

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

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

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

- o On success
- o On error

- On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## Processing the Journal Entry Output

Use the `publicSectorMappingAttachments` REST API to process the output file generated by the Export Journals to ERP. For more information on this REST API, see [REST API for Oracle Public Sector Cloud](#).

# 17 Working with Processes

## Using the Process Monitor

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

This example shows the Process Monitor page.

Process Monitor

Schedule New Process 

Last 12 hours 

Name	Process ID	Status	Submitted By	Submission Time	Scheduled Time	Actions
Export Journals to ERP	14336	Running	SYSTEM_ADMIN	5/8/19 3:08 PM PDT	5/8/19 3:08 PM PDT	 
Generate Accounting	14306	Succeeded	SYSTEM_ADMIN	5/8/19 3:01 PM PDT	5/8/19 3:01 PM PDT	 

## Scheduling a New Process

1. Select **Common > Process Monitor**.
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the *Generate Accounting* process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.
  - Note:** Processes can be run immediately or scheduled to run at a specific time.
6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

## Managing Processes

Select **Common > Process Monitor**.

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

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

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

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

You can manage processes using the following page elements:

Page Element	Description
<b>Actions</b>	Click the icon in this column to select one of the following actions: <ul style="list-style-type: none"><li>• <i>Put on Hold</i></li><li>• <i>Release Process</i></li><li>• <i>Cancel Process</i></li></ul>
<b>View More Details</b>	Click to view additional information about the process on the Process Details page.

# 18 Using the Digital Assistant

## Overview of Digital Assistant

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

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

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

## Asking Details

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

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

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

## Asking Questions

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

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

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).



# 19 Using Accessibility Features

## Overview of Accessibility

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

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

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

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

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

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

## Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

Keyboard Shortcut	Description
Tab	This is the primary key used by all keyboard users to move from each control that can accept focus. <ul style="list-style-type: none"><li>• Use Tab to select any actionable or field just like you can use the mouse to select any field on the page.</li><li>• 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.</li><li>• 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.</li><li>• 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.</li></ul>
Shift+Tab	This keyboard combination works the same as Tab, except it works in the opposite direction. For example, it enables you to switch focus to the previous control or field, rather than the next control or field.

Keyboard Shortcut	Description
Spacebar	Use for: <ul style="list-style-type: none"> <li>• Selecting a tab</li> <li>• Activating a button</li> <li>• Selecting a check box</li> <li>• Selecting a radio button that is not selected</li> </ul>
Enter	Use to: <ul style="list-style-type: none"> <li>• Press a button.</li> <li>• Click a link.</li> <li>• Select an item from a drop-down list.</li> </ul>
Down Arrow	Use for: <ul style="list-style-type: none"> <li>• Moving through values in a drop-down list</li> <li>• Selecting different values in a set of radio buttons</li> <li>• Moving between different folder tabs</li> </ul>
Up Arrow	Works the same as the Down Arrow, except it enables you to move in the opposite direction (previous instead of next).
Left Arrow	Works similar to the Up Arrow.
Right Arrow	Works similar to the Down Arrow.
Home	When in the context of tabs, sets focus to the first tab.
Ctrl+Home	Takes you to the very top of a page.

## Using the Keyboard with Data Collections

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

### Tables

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

## Country

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

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

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

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

## List View

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



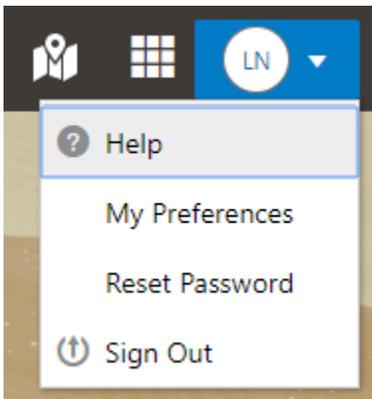
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item, unless the item is already selected.

# Using the Keyboard to Work with Page Controls

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

## Buttons

This section describes how to use the keyboard to control buttons in the global header or on pages.



Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

## Calendar

This section describes the hot keys you can use when working with the calendar control and date picker to select date field values.

Auto Number Rule | Electrical Permit 🔍

\* Valid from Date  📅

Valid to Date 📅

Public User Enabled

\* Department 1

Workflow Space Name

Workflow Application ID

< July 2018 >

M	T	W	T	F	S	S
2	3	4	5	6	7	8
<b>9</b>	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

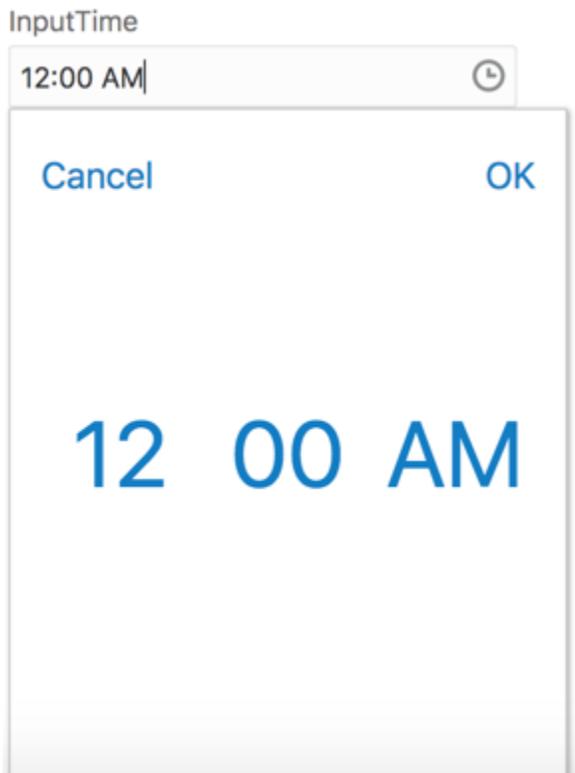
Today

Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calendar grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
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 the Today button if it exists.

## Time

This section describes the hot keys you can use when working with the time picker control to select time field values.



Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker
Tab In	Set focus to the input. If hints, title, or messages exist in a note window, displays the note window.

## Accordion

This section describes the hot keys you can use when working with the accordion control to expose and access items. An accordion is a set of expandable sections where only one section can be expanded at a time. When a new section gets expanded, the previous section automatically closes.

### Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements
  - Group box
  - Text field
  - Number field
  - Date time field
  - Switch
  - Text area
  - Radio button set
  - Check box set
  - Drop-down list
  - Multi-Select list

The following table lists the keyboard options for working with the collapsible headers.

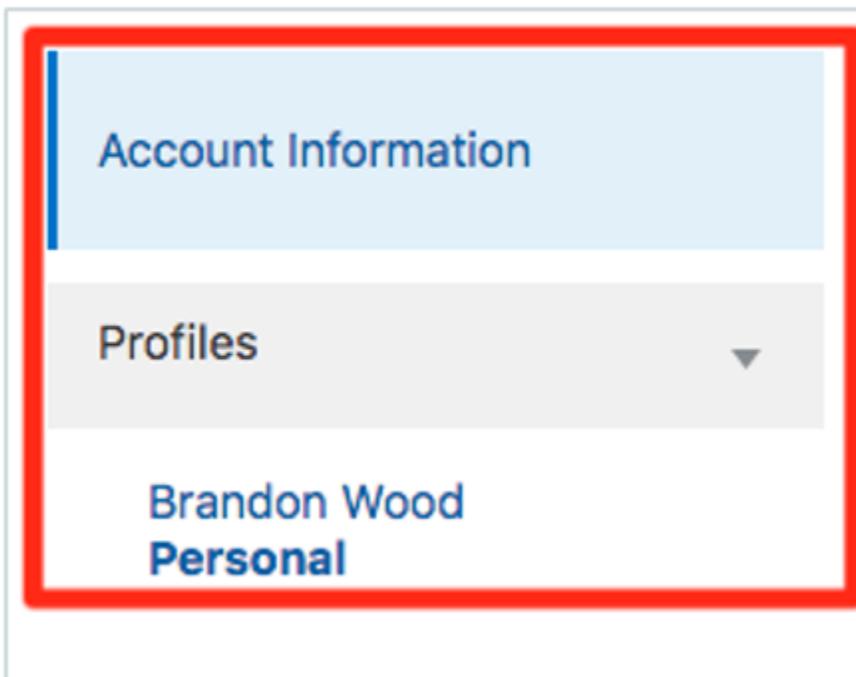
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move focus to the previous collapsible header with wrap around.

Key	Description
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.
Home	Move focus to the first collapsible header.
End	Move focus to the last collapsible header.

## Navigation Lists

This section describes how to use the keyboard to work with navigation lists to access items used take you to different locations or display additional content.

# Manage Account



The following table lists the keyboard options used for accessing list items.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.

Key	Description
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift+Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

## Tab Bars

This section describes how to use the keyboard to work with tab bars.



Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.

Key	Description
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl+X	Marks the current item to move if the reorderable feature is enabled.
Ctrl+V	Paste the item that are marked to directly before the current item
Delete	Delete the current item.