

Oracle Public Sector Compliance and Regulation Cloud

**Using Community Development
Code Enforcement**

21C



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Contents

Preface	i
<hr/>	
1 Managing Public Users	1
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	8
Managing Public User Accounts	11
Verifying Public User Information	24
2 Code Enforcement Activities for Public Users	27
The Public User Landing Page for Code Enforcement	27
Reporting Issues	28
Tracking Issues	30
Viewing Recent Issues	31
Paying Citations	32
Resolving Issues	33
3 Overview of Working With Incidents And Cases	37
Using the Agency Springboard	37
The Issue Lifecycle	40
Using the Code Technician Worklist	46
Using Third-Party Integration for Incident Intake	49
4 Managing Incidents	53
Reviewing Incident Lists	53
Claiming and Assigning Incidents	55
Processing Incidents	58
Working with Incident Details	64
Working with Incident Communications	73

5	Managing Inspections	79
	Overview of Mobile Oracle Municipal Code Officer	79
	Installing and Configuring Oracle Municipal Code Officer	84
	Using the Code Officer Worklist	85
6	Managing Cases	89
	Reviewing and Claiming Cases	89
	Processing Cases	90
	Creating a Case	92
	Navigating to Case Details	93
	Viewing the Case Detail Overview	94
	Working with Case Timeline	96
	Working with Case Property Information	97
	Using Workflow	98
	Working with Code Enforcement Inspections	110
	Working with Notices	113
	Working with Code Violations	116
	Working with Comments	117
	Working with Attachments	118
	Working with Appeals and Hearings	123
	Adding Responsible Parties	127
	Working with Citations	129
	Working with Citation Fees and Payments	130
	Working with Related Transactions	133
7	Working with Maps	137
	Overview of Delivered Maps	137
	Using the Map Toolbar	140
	Viewing Map Markers	141
	Using the Main Map and Explore Your City Map	144
	Creating Map-Based Public Notification Lists	150
8	Using Accessibility Features	153
	Overview of Accessibility	153
	Using General Keyboard Shortcuts	153
	Using the Keyboard with Data Collections	154

Preface

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

Oracle Cloud Applications Guides

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.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.

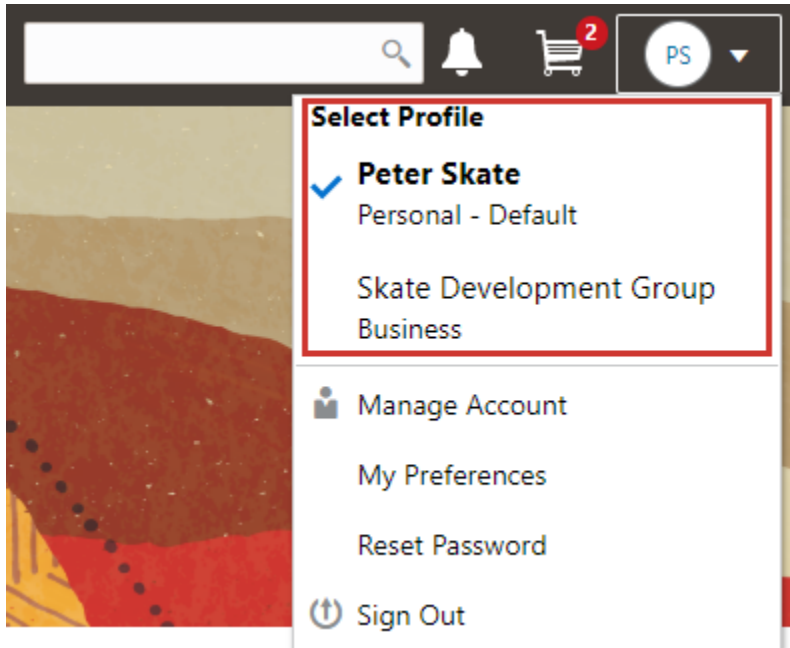
Updates to the address, phone, or email made during subsequent applications can be saved to the user's account profile.

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 PIN 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.

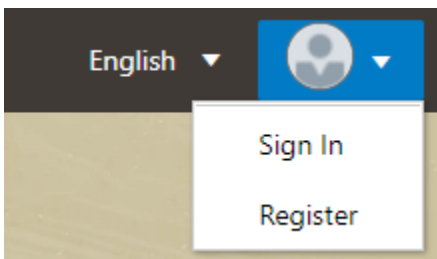
- **Conditions:** restrictions that prevent certain actions or issue warnings when the actions are attempted.

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, if required.
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 public user can submit registration information for them. 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 for business use and is described in the following table.

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

Your email address is your user name.

* Email Address

* Confirm Email Address

Country

Postal Code

[Don't know](#)

Phone Ext.

You can access permit information and manage your inspection schedule by phone. You will need this four-digit access code every time you call into the automated phone system. If you forgot your access code, you can reset it on the account management page. Click the help icon for more information.

[?](#) IVR Access Code

[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 Account Use 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 Overview of Public User Accounts and Profiles.</p>
Are You a Contractor?	<p>Indicates whether the account holder is a contractor. This switch is visible only if the user selects Business 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 Add License button to provide license details.</p> <p>Registering as a contractor and entering license information does not affect processing any way, nor does it add the user to the agency's contractor records.</p>
Add License	<p>Used to provide details of a contractor license held by a business. This button is visible only if the user selects Business 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: License Type, License Number, Issued On, and Expiration Date.</p> <p>During registration, the user can enter information for only one license. After registering, the user can add additional licenses from the Manage Account page. See Managing Public User Accounts.</p> <p>Note: Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.</p>
Mask My Contact Information from Public View	<p>Gives the user the option to hide 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>
Salutation	<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>
First Name and Last Name	<p>The user's name, which is the same across all of the user's profiles.</p>
Business Name	<p>This field is visible only if the Account Use field indicates that this is a business account. The business name entered here is associated with the business profile that the registration process creates. If additional business profiles are added later, they have their own business names.</p>
Email Address and Confirm Email Address	<p>The user's email address. Enter the email address again to confirm.</p>

Page Element	Description
	<p>Note: The user's email address is their user name or user ID. There is no separate user name or user ID to sign in.</p> <p>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.</p>
Address Fields	<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 Country field displays <i>US</i>.</p> <p>As the user enters a Postal Code, 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 Don't know link to display a full set of address fields.</p>
IVR Access Code (Interactive Voice Response Access Code)	<p>A 4-digit PIN that public users enter when accessing permit inspections using the agency's interactive voice response system.</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 can reset it on the account management page. For information about entering a new code after registering, see Managing Public User Accounts.</p> <p>This field appears only if your agency enables IVR access codes on the Public User Setup page. See Setting Up Public Users.</p>
Phone	<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 when 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.

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.

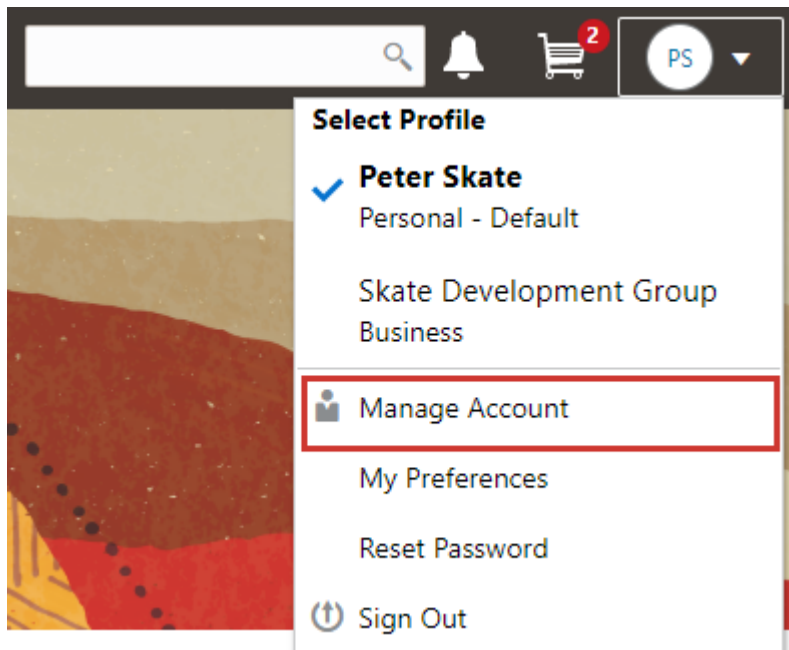
Account Management Navigation for Registered Public Users

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 navigation options: 'Conditions', 'Account Information', and 'Profiles'. The 'Profiles' section is active, showing a list of profiles with a button for 'Joe Smith, Personal, Default'. The main content area displays details for 'Profile-Joe Smith' with buttons for 'Clone Profile' and 'Create New Profile'. The details are organized into 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
Profile Name	Enter a descriptive name. This is the name that appears in the page header when this profile is in use.
Profile Type	If the account does not already have a personal profile, select either <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.
Business Name	If the profile type is <i>Business</i> , enter the business name. This field is not visible for personal profiles.
Status	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. 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
Clone From	This read-only field displays the name of the profile that you're cloning.
New Profile	Enter a descriptive name for the new profile. This name appears on the landing page banner when this profile is selected.
Profile Type	If the account does not already have a personal profile, select either <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.
Business Name	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
Contact Details	Select this check box to automatically select the check boxes for all three specific contact methods: Address, Phone, and Email . Deselect this check box to clear the check boxes for all three specific contact methods. You can also select and deselect the individual check boxes for each contact method.
Contacts	Select this check box to copy contacts into the new profile.
Licenses	Select this check box to copy licenses into the new profile. Verification statuses are also copied to the new profile, so agency staff does not have to re-verify the information.

Page Element	Description
Trust Accounts	Select this check box to copy trust account information into the new profile. Verification statuses are also copied to the new profile, so agency staff does not have to re-verify the information.

6. Click **Create**.

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

Setting the Default Profile

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

To designate a profile as the default profile:

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

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

5. Click **Save**.

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

Managing Public User Accounts

This topic describes the account and profile information that can be updated using account management functionality. The Manage Account page is available to both public users, who can manage their own accounts, and 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
User Name	Registered users see their first and last name. This field is read-only.

Page Element	Description
Email	<p>The email that was provided during registration. This field is read-only.</p> <p>This email is used for the user ID and account access notifications such as those related to setting passwords and changing or verifying account or profile information.</p> <p>Notifications related to transactions are sent to the transaction email address, which is inherited from the user profile. The profile and transaction email addresses do not have to be the same as this account email.</p>
IVR Access Code (Interactive Voice Response Access Code)	<p>This field appears only if the agency enables IVR access codes on the Public User Setup page. See <i>Setting Up Public Users</i>.</p> <p>This field originally contains the 4-digit PIN that public users enter when registering. It's used to access permit information and schedule inspections in the agency's interactive voice response system.</p> <p>The code is masked on this page. To change the code, click the Edit icon.</p> <p>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.</p>

- 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.
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Profile Name	If the attachment is associated with a specific profile, the profile name appears. If the attachment is associated with the account in general (and not with a specific profile), this column is blank.
Category	<p>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.</p> <p>When visible, this field displays the document category for the attachment.</p> <p>For more information, see <i>Setting Up Document Categories and Subcategories</i> and <i>Setting Up Document Groups</i>.</p>

Page Element	Description
Subcategory	<p>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.</p> <p>When visible, this field displays the document subcategory for the attachment.</p>
Actions	<p>Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.</p>

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.
Trust Accounts	The number of trust accounts for the profile.
Conditions	The number of active conditions for the profile. Although the details for this section includes both active and resolved conditions, the count in the summary includes only active conditions.

Updating Profile Basics

To update profile basics:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Profile Basics** section to open the Profile Basics page.
4. Review and update the following fields:

Page Element	Description
Profile Name	<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>
Default	<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>
Profile Type	Displays either <i>Personal</i> or <i>Business</i> . You cannot change the profile type.
Status	<p>Profiles can be <i>Active</i> or <i>Inactive</i>. Only active profiles appear in the Select Profile menu for switching profiles.</p> <p>Inactive profiles are not editable. To make a profile active after you create it, edit the profile basics using account management functionality. See Managing Public User Accounts.</p>

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

Updating Profile Information for a Business

To update profile information for a business:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Profile Information** section to open the Profile Information page.
4. Review and update the following fields:

Page Element	Description
Business Name	A free text field for the business name.

Page Element	Description
Business Type	A drop-down list of business types. The values for this field are defined on the Lookup Type Details page for the ORA_PSC_CC_BUSN_TYPE lookup type.

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

Managing Contact Information

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

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

To update contact information:

1. Access the Manage Account page.
2. Select a profile in the left frame.
3. Click the **Contact Information** section to open the Contact Information page.
4. To add or modify a contact method:
 - a. If you are adding a contact method, click **Add** in the appropriate section (Address, Phone, or Email) to open the Details page.
 - b. If you are updating a contact method, click the **>** icon at the end of an existing row to open the Details page.
 - c. Select the **Type**.

The Details page displays different fields depending on the type of contact method, but all contact methods include the **Type** field. Address types are *Home* and *Work*. Email and Phone types are *Home* and *Business*.
 - d. If you're adding a new address, either enter the **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. When there is only one contact method of each type, it is automatically primary.
 - g. Click **Save** or **Cancel** to close the Details page and return to the Contact Information page.
5. To delete a contact method, click **Delete** for the appropriate row.
6. Click **Cancel** to return to the Manage Account page.

Managing Contacts

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

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

To manage contacts:

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

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

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

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

- b. Select one or more contacts to be copied.
- c. Click **Select**.

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

5. To add a new contact or modify an existing contact:
 - a. If you are adding a contact, click **Add** to open the Contact Details page.
 - b. If you are updating a contact, click the ► icon at the end of the row to open the Contact Details page.
 - c. On the Contact Details page, enter the contact's **First Name, Middle Name, Last Name, and Business**.
 - d. To enter an address, enter the **ZIP Code** or click the **don't know** link to reveal additional address fields, then enter information in those address fields.
 - e. Enter a **Phone** and **Ext** (extension).
 - f. Enter an **Email**.
 - g. Click **Save** or **Cancel** to close the Contact Details page .

Any information you save immediately appears on the Contacts page.

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

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

Updating Licenses

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

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

To update license information:

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

Page Element	Description
Are you a Contractor?	To indicate the contractor status, select either <i>Yes</i> or <i>No</i> .
Verification Status	<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>Note: 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
License Type	This is a free text field for entering the type of license, such as a General Contractor license or an Electrical Contractor License.
License ID	Enter the license number that uniquely identifies the license.
Start Date	Enter the date that the license became valid.
Expire Date	Enter the date that the license expires or requires renewal.

Page Element	Description
Verification Status	<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>Note: 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
Account Number	Enter the unique account number for the trust account.
Description	The description might include the financial institution name and other important information about the account.
Status	Select <i>Active</i> or <i>Inactive</i> .

Page Element	Description
Verification Status	<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>Note: 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
File Name / Date	The file name of the attachment, and the date that the attachment was added to the account.

Page Element	Description
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Category	<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 <i>Setting Up Document Categories and Subcategories</i> and <i>Setting Up Document Groups</i>.</p>
Subcategory	<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>
Actions	Click to access a menu with options for viewing attachment information, downloading the file, or deleting the attachment from the account.

4. To add a new attachment:

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

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

5. To view or modify attachment information:

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

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

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

You are prompted to confirm the deletion.

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

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

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

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 Icon]

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

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.
Type (type of request)	Explains what type of information must be verified. Values include:

Page Element	Description
	<ul style="list-style-type: none">○ <i>User is a contractor</i>○ <i>User added or updated license</i>○ <i>User added or updated trust account</i>
Verification Details	Displays identifying details for a license or trust account. License details include the license number, license type, the date issued, and the expiration date. Trust account details include the account number and status. This column is blank for requests to verify a user's contractor status .
Verification Status	Because this page lists only pending verification requests, all rows initially have the status <i>Pending Verification</i> .

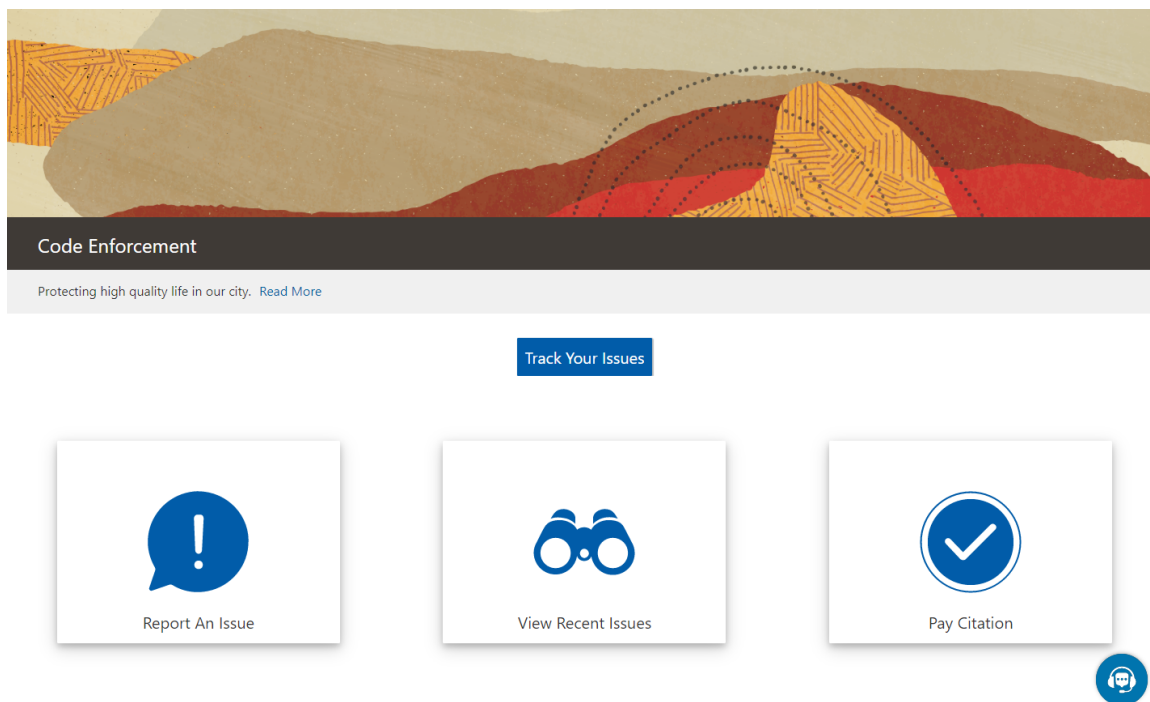
5. Update the **Verification Status** for any requests where the verification process is complete.
Select either *Verified* or *Verification failed*, depending on whether you were able to verify the information.
6. Click the **Save** button.

2 Code Enforcement Activities for Public Users

The Public User Landing Page for Code Enforcement

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

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



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

For information on configuring these elements of the welcome banner, see [Setting Up Agency-Level Options for Code Enforcement](#).

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

Tile or Button	Who Can Use	Description
Report an Issue	Anonymous and registered users.	Report an issue to the agency. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured. See Reporting Issues .

Tile or Button	Who Can Use	Description
Track Issues	Registered users. This button is visible only after the user signs in.	View status and other information about issues that the user reported while signed in. A user who reports an issue without signing in can't track the issue. See <i>Tracking Issues</i> .
View Recent Issues	Anonymous and registered users.	View a map with markers that identify the locations of recent issues, or view a searchable list of the issues. See <i>Viewing Recent Issues</i> .
Pay Citation	Registered users. Anonymous users are prompted to sign in before continuing.	Make an online payment for a code enforcement citation. See <i>Paying Citations</i> .
Resolve an Issue	Registered users. Anonymous users are prompted to sign in before continuing.	Claim responsibility for an issue, and perform actions such as viewing notices or appealing a citation. See <i>Resolving Issues</i> .

Reporting Issues

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

Note: Agency staff can also report issues. To do this, go to the agency springboard and select *Report an Issue* in the **I Want To** field, then click **Go**.

Here is a summary of the issue reporting process:

1. On the public user landing page, the user clicks the **Report an Issue** tile. The Select an Issue Type page appears. For the public user, this page lists the agency's issue subtypes and a description to provide details. For the agency user, the list displays only the issue types and subtypes linked to the issue types, and not the description.
2. The user can search for an issue type or select one from the list.

Note: If your agency's configuration does not allow users to report incidents anonymously, the user is prompted to sign in before continuing to the remaining steps.

After this point, the user navigates through the remaining steps using **Next** and **Previous** buttons. The user can't go back to choose a different issue type or subtype. If the issue wasn't properly classified, the user needs

to cancel the report and start again. If an improperly classified report is submitted, agency staff can still assign a new issue type and subtype.

3. On the **Provide the Location of the Issue** step, the user identifies the location using a searchable map.
 - o A crosshairs icon on the map shows the selected location. If location sharing is active, the user's current location appears by default.
 - o The user can search for an address or location, and the map adjusts to place the specified location in the crosshairs.
 - o The user can pan and zoom the map to more precisely identify the issue location, and the search bar automatically displays the address or the coordinates of the location in the map crosshairs.

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

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

This information is optional if there is an address or location coordinates. When there is no address or location coordinates, additional address details are required.

- o If the location is outside of the agency's boundary, a message instructs the user to change the location to one inside the agency's limits.

The user will not be able to submit an issue with a location that is outside the agency's boundary.

Click the **Confirm Location** button to navigate to the next page.

4. On the **Tell Us What's Going On** step, the user describes the issue and optionally attaches photos, videos, audio files, or other attachments.
5. On the **Just a Few More Questions** step, the user answers any additional questions defined by the agency.

This step includes a **Does this issue pose a health hazard or public safety risk?** switch to indicate the urgency of the issue. Agencies can add additional questions as well.

6. On the **Provide Contact Information** step, the user verifies their name, email, and phone information or chooses to hide this information.

Default contact information comes from the user's account. The user can keep these values, modify them, or turn on the **Hide my contact information** switch. Regardless of whether the user hides the information from agency staff, the information is never visible to the public.

Note: If the agency configures the system to require contact information from the person reporting the issue, the **Hide my contact information** switch is hidden and contact information is required. For information about this configuration option, see [Setting Up Agency-Level Options for Code Enforcement](#).

7. On the read-only **Review** step, the user reviews all of the issue information.

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

Note: The user can't change the issue type or subtype after continuing past those steps.

8. The user clicks **Submit**.
9. A confirmation message with the issue number appears.

Tracking Issues

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

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

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

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

The Issues page appears.

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

Page Element	Description
Issue ID	Displays two rows of information. The incident ID appears in the first row. The incident type and subtype appear in the second row.
Location	Displays the address for the issue.
Description	Displays the original issue description that was supplied by the person who reported the incident.
Status	<p>Displays the incident status. These are the possible incident statuses:</p> <ul style="list-style-type: none"> ○ Reported ○ Inspection ○ Compliance ○ Violation ○ Closed ○ Duplicate ○ Void <p>When an incident results in a notice of violation and the creation of a case, the incident status is based on the case status. So even though the public users do not have direct access to case data, the incident status conveys information about the overall status of the issue.</p> <p>Note that incident statuses are less granular than case statuses. For example, if an incident is in <i>Violation</i> status, the corresponding case could be in any of several statuses such as <i>Violation</i>, <i>Mandatory Abatement</i>, or <i>Citation</i>.</p>

Page Element	Description
Attachments	Displays an attachment icon. Clicking the icon opens a window with a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
Reported On	Displays the date that the issue was originally submitted.

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

The Issues page has these sections:

- A header that displays the incident ID, the issue type and subtype, and the incident status.

If the incident was reported with the wrong issue type and subtype, and agency staff corrected this information and rerouted the issue, then the original issue gets closed and replaced by a new correctly classified issue. In this situation, the header also displays the message *Rerouted to issue <new incident ID>*.

The public user doesn't have access to the new incident, which was created by the staff member who rerouted the original incident.

- A map that displays the issue location.
- A Details section that shows the issue address, description, and whether the issue was reporting as posing a health hazard or public safety risk.

If the person who reported the issue supplied their name, email, and phone, then that information also appears.

- An Attachments section that displays a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
- A History section that displays the incident's status history. This section lists the current and previous statuses, along with the date that the status was applied and, if applicable, the reason for the status change.

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

Viewing Recent Issues

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

Overview of Recent Issues

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

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

Viewing Recent Issues

To view recent issues, public users follow these steps:

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

The View Recent Issues page appears in map view.

2. The user can employ the search, zoom, and pan functionality of the map to show a specific area.

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

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

3. Review the issues markers on the map.

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

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

For more information, see [Viewing Map Markers](#).

4. To view issue details, the user clicks an issue marker to open a pop-up panel with more information:

- o The issue ID (case ID) and the status appear in bold.
- o The issue description, reported date, and location also appear.
- o If the location has multiple issues, the user can see how many issues exist and which one is currently visible—for example, *1 of 3*. **Previous** and **Next** controls enable the user to page through the issues.
- o A **Zoom To** link zooms the map while keeping the issue centered.

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

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

Paying Citations

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

Note: The person paying the citation must be a registered user. For information on user registration, see [The Public User Registration Process](#).

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

1. On the code enforcement landing page, the user clicks the **Pay a Citation** tile.
2. The user signs in if prompted.
3. On the Pay Citation page, the user enters the citation ID and clicks the **Search** icon.
Citation information, including the amount and the due date, appear on the page.
4. The user clicks the **Pay** button.
5. On the **Checkout** page, the user chooses a payment method and clicks the **Make Payment** button.
6. The user follow the instructions for the chosen payment method.

Resolving Issues

Registered public users can access their cases online to address code violations for which they are responsible. Users request access from the Resolve Issue page, view a summary of their cases, and initiate actions such as an appeal.

Tip: Users can request online access and manage their cases on a phone as well as on a laptop or desktop computer. The layout changes based on the device being used.

Requesting Access

Registered public users use the case ID and access number provided by the code enforcement agency to submit a request for accessing their case online. Once the agency approves the request, the case is listed in the Resolve Issue page.

Here are the steps for a registered public user to request online access to a case:

1. On the registered public user landing page, the user clicks the **Resolve an Issue** tile.
If there are no cases available for online access, the Request Access to Your Case page is displayed.
2. On the Resolve Issue page, the user clicks the **Request Access** button.
3. On the Request Access to Your Case page, the user enters values provided by the agency in the following fields:

Page Element	Description
Case ID	Enter the identifier of the case as displayed in the notice.
Access Number	Enter the unique number associated to the specific case, provided by the agency.
Additional Information	Enter any detail, such as a reason for requesting access to the case.

4. The user clicks the **Request Access** button.

Agency staff such as a code technician receive the request, review, and decide to issue access or deny the request. For information on reviewing and taking action on access requests, see *Using the Code Technician Worklist* and *Adding Responsible Parties*.

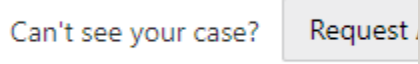

Note: Agency staff decide the type of access they should issue to the requestor. Access types determine the level of control the registered users have on their cases.



Resolving Issues

After the agency staff approve the access request, registered users can view their case in the Resolve Issue page.

On the Resolve Issue page, users get a snapshot of the information regarding the cases to which they have online access. Cases can be displayed in a card view or list view, and actions such as viewing the notice document and requesting an appeal can be performed from the Resolve Issue page.

From the registered user’s landing page, registered users can access their approved cases by clicking the **Resolve an Issue**. The following table lists the information that registered users can use on the Resolve Issue page:

Page Element	Description
	<p>Select to request access to a case.</p> <p>See the previous section for more information.</p>
	<p><i>Card View:</i> View the cases one at a time displayed on a card format. Slide the card to the left or right to view the previous or next case in the list. This is the default view of the user's case list.</p> <p><i>List View:</i> View all the cases in a list format.</p> <p>Tip: In the list view, you can use the Filter By and Sort By options to refine your case search.</p>
Issue type and subtype	View the issue type and subtype to which the case belongs.
Case ID	View the identifier of the case that was generated at the time of case creation.
Address	View the address of the location associated to the issue.
Description	View detailed information about the issue recorded at the time of case creation.
Code Officer	View the name of the code enforcement officer inspecting the case.
Appeal By	<p>View the last date for submitting the appeal.</p> <p>The Appeal option is available only if the user is viewing the case within its appeal period. The period in which an appeal can be submitted is determined by the agency using the time rules set up. See Setting Up Time Rules.</p>

Page Element	Description
 Appeal	Select to submit an appeal for the issued violation or citation. On the Appeal page, enter a reason for appeal and click Submit . Note: In the list view, the appeal option is available in the Actions menu.
Appeal Requested On	View the date on which the user submitted an appeal.
Total <amount> Due on <date>	View the total citation amount to be paid along with the due date.
Created On	View the date of case creation.
Case Status	View the status of the case: <ul style="list-style-type: none"> • Appeal • Violation • Mandatory Abatement • Citation • Closed
 View Notice	Select to open the notice in a format that is set up by your agency.
Comply By	View the last date to ensure compliance.

3 Overview of Working With Incidents And Cases

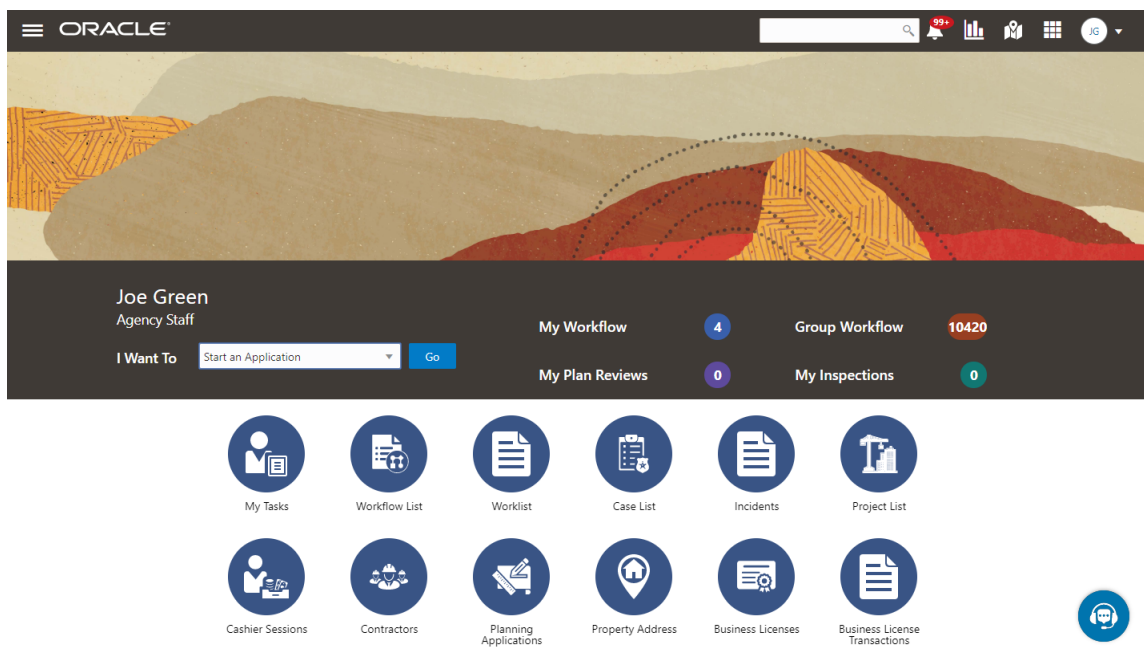
Using the Agency Springboard

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

The Agency Springboard 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 Back icon to return to the previous page. The banner doesn't include this icon when you're on the springboard.</p>
	<p>Click the Navigator icon to access pages using a hierarchical menu.</p>
	<p>Click the Home icon to return to the Agency Springboard. The banner doesn't include this icon when you're already on the springboard.</p>
<p>Global Search (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"> • Permits: In process and completed permit applications. • Planning Applications: In process and completed planning applications. • Inspections: Scheduled and completed building inspections. • Projects: Active projects. • Incidents: In process and completed incidents. • Cases: In process and completed cases. • Citations: Paid and unpaid citations. • Business Licenses: Active, inactive, expired, suspended, revoked, and closed business licenses. <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>Note: 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 Notifications 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 View All 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 Reports and Analytics icon to access the Oracle Business Intelligence Catalog (BI Catalog) or access predefined dashboards.</p>
	<p>Click the Maps icon to access these maps:</p> <ul style="list-style-type: none"> • The main agency map lets you view existing transactions or start new applications for properties that you select. • The Public Hearing map lets you generate hearing notifications by defining an area and generating lists of parcels, owners, and addresses for that area. <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 Page Finder 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 Choosing an Application Type .
<i>Estimate Fees</i>	Opens the Apply page, where you can chose an application type and estimate fees for your application. See Getting an Online Fee Estimate .
<i>Schedule an Inspection</i>	Opens the Inspection List page, where you can request a permit inspection. See Requesting Inspections .
<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 Reporting Issues .
<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 Paying Citations

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.

The Issue Lifecycle

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

Incidents, Cases, and Issues

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

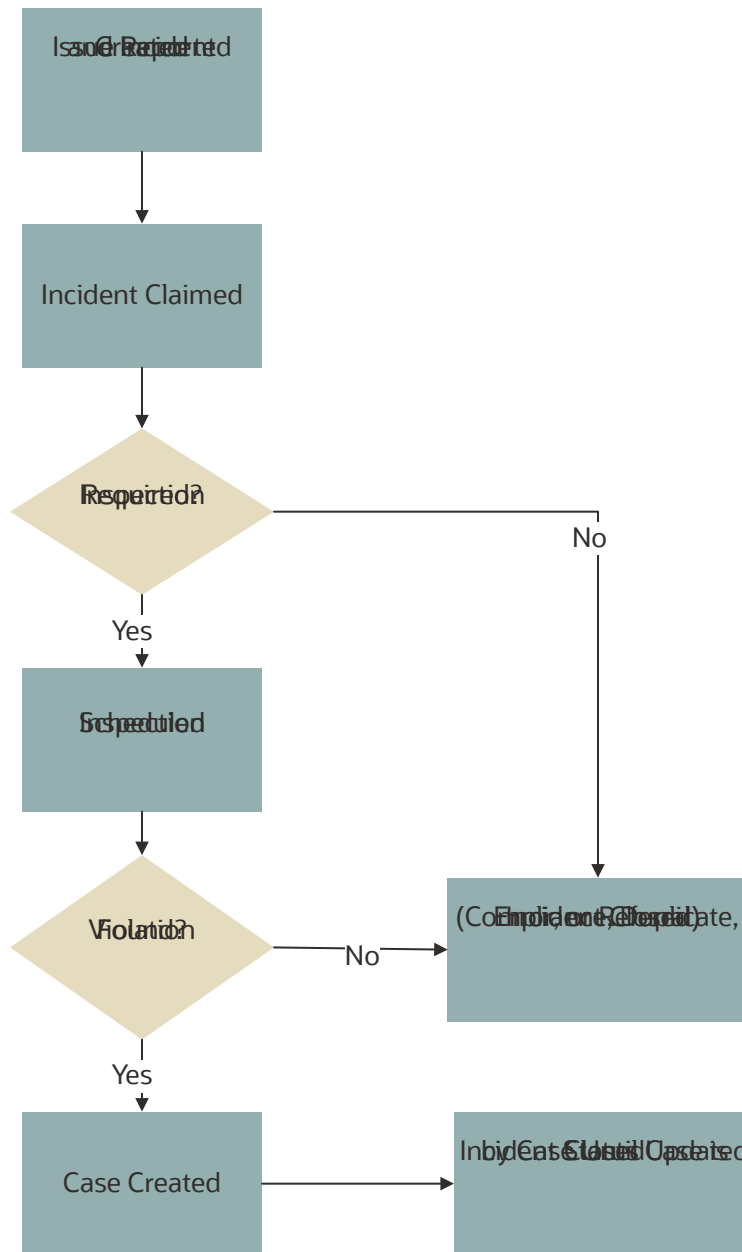
Term	Definition
Incident	<p>When a problem is reported, the system object that corresponds to the report is an <i>Incident</i>. If several people report the same problem, there can be multiple incidents for the problem.</p> <p>Code technicians claim incoming incidents and process them using a fixed set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

Term	Definition
	Agency-facing pages use the term <i>Issue</i> in limited situations where incidents and cases appear together.

Incident and Case Process Flow

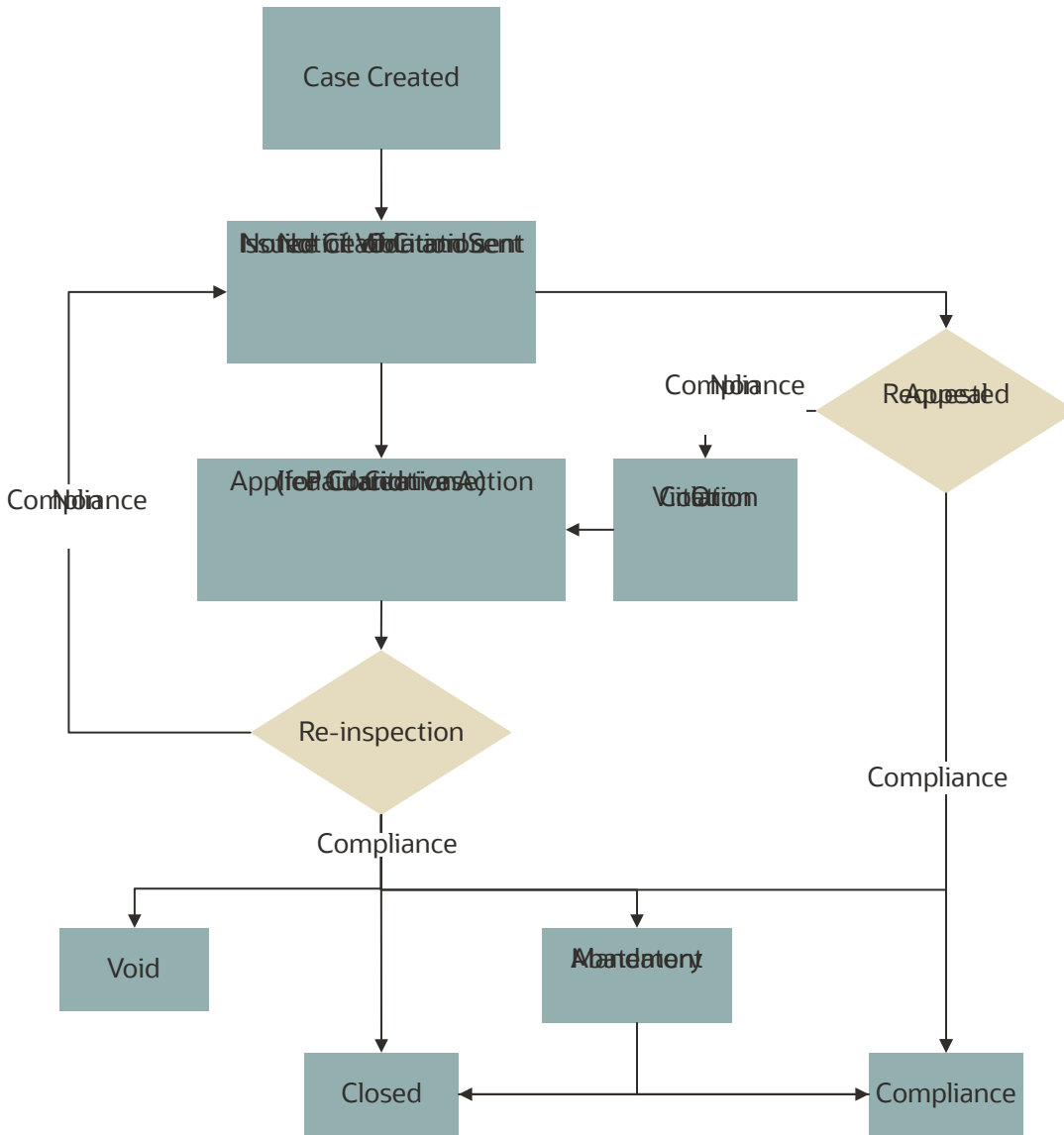
Incidents and cases have their own distinct process flows as illustrated below. Not all issues go through all of these events, but the diagrams provide a general outline of the issue lifecycle.

This diagram illustrates the lifecycle of an incident.



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

This diagram illustrates the lifecycle of a case.



Time Rules and the Issue Lifecycle

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

For more information about setting up time rules, see [Setting Up Time Rules](#).

Reporting an Issue

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

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

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

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

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

For more information about issue reporting, see [Reporting Issues](#).

Claiming an Incident

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

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

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

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

For more information about claiming incidents, see [Claiming and Assigning Incidents](#).

Reviewing and Processing an Incident

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

Technicians have these options for processing incidents:

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

The technician chooses a date and a code enforcement officer for the inspection.

- Mark the incident as a duplicate of either another incident or a case.

Technicians can search existing incidents and cases to see if the issue was already reported.

- Close the incident and provide a reason.

Incidents are closed when they are in compliance, invalid, or when they are referred to another agency to handle the issue.

- Reassign the incident to a different technician.

For more information about the actions that a technician can take, see [Processing Incidents](#).

Inspecting the Incident

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

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

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

Creating a Case

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

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

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

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

For more information about case details, see [Processing Cases](#).

Issuing a Notice of Violation

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

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

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

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

For more information about notices, see [Working with Notices](#).

Issuing a Notice of Citation

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

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

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

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

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

For more information about citations, see [Working with Citations](#).

Managing Appeals

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

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

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

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

For more information about appeals, see [Working with Appeals and Hearings](#).

Paying a Citation

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

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

For more information about the payment process, see [Paying Citations](#).

Incident and Case Status Updates

As and when the status of a case changes, the status of the associated incident is updated automatically. The following table lists the various status changes for a case and their updates to the associated incident:

Status of Case	Status Update to the Incident
Violation	Violation
Closed as a referral	Closed as a referral, with referral code detail
Closed as a result of compliance	Closed as a result of compliance
Void	Closed, with reason – Error
Compliance	Closed as a result of compliance

Using the Code Technician Worklist

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

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

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

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

The code technician worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Incoming Incidents	<p>Unclaimed incidents. These are incidents in <i>Reported</i> status that do not have an assigned technician.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> A Report Incident button which provides quick access for the user to report a new incident from the worklist. A map view for displaying incident locations. 	<ul style="list-style-type: none"> Claim (code enforcement technicians) Assign (code enforcement supervisors) 	<p>Supervisors assign incidents to code enforcement technicians, while technicians claim incidents for themselves. Both actions result in assigning a technician to the incident, which removes the incident from this tab.</p> <p>For more information, see Claiming and Assigning Incidents.</p> <p>The Overdue subtab shows unclaimed incidents with a due date before the current date.</p>

Tab	Displays	Available Actions	Additional Information
	<p>Note: If automatic routing is active, this tab displays only incidents in the user's area of responsibility, as established by the Issue Type and Issue Subtype attributes for the Code Enforcement Technician or Code Enforcement Supervisor job functions. If there are no unassigned incidents in a technicians areas of responsibility, the Worklist tab order changes to show Incidents as its first tab.</p>		<p>The Priority subtab shows unclaimed incidents where the Priority switch is enabled.</p>
Incidents	<p>Unprocessed incidents (those in <i>Reported</i> status) where the current user is the assigned technician.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> • A Report Incident button which provides quick access for the user to report a new incident from the worklist. • A map view for displaying incident locations. 	<ul style="list-style-type: none"> • Schedule Inspection • Mark as Duplicate • Reassign • Release • Reroute Incident • Close 	<p>The actions that are available here are also available from the incident detail page.</p> <p>For more information, about taking action on incidents, see <i>Processing Incidents</i>.</p> <p>Completing any of the available actions removes the incident from this tab.</p> <p>The Overdue subtab shows claimed incidents with a due date before the current date.</p> <p>The Priority subtab shows claimed incidents where the Priority switch is enabled.</p>
Notice of Violation	Violation notice object records created for code violations.	<ul style="list-style-type: none"> • Generate • Continue 	<p>The <i>Generate</i> action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page and complete the details and print.</p> <p>The <i>Continue</i> action signifies that the notice is generated, and you can make changes to the details before printing it.</p> <p>Any changes made to the notice process will automatically update the case detail pages.</p>
Notice of Citation	Citation notice object records created for code violations.	<ul style="list-style-type: none"> • Generate • Continue 	A citation notice also contains information about the citation fees.

Tab	Displays	Available Actions	Additional Information
Hearings	Cases that have requested appeals or hearings in <i>Scheduled</i> status.	<ul style="list-style-type: none"> Update Hearing Decision Reschedule Hearing Cancel 	For details about appeals and hearings, see <i>Working with Appeals and Hearings</i> .
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	Assign	<p>When you are assigning a case, the Assign Technician page lists only the technicians that are associated with the issue type and subtype of this case. Select the Show All Technicians check box to list all the technicians.</p> <p>Note: This check box is available to agency staff with appropriate permissions.</p> <p>You can also assign cases from the case Overview page. See <i>Viewing the Case Detail Overview</i>.</p>
Access Requests	Cases that have pending requests from registered public users who have asked for online access to the case.	<ul style="list-style-type: none"> Allow Access as Owner Allow Access as Contact Deny Access 	<p>Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.</p> <p>Users can't access their case if the agency denies their request.</p>
Cases	All active cases assigned to the logged in technician.	Update Status	<p>Status options:</p> <ul style="list-style-type: none"> Violation Closed Compliance Void Mandatory Abatement Legal <p>Once the status of a case changes to <i>Compliance</i>, it is removed from the list.</p>
Incoming tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in technician or the technician group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> Claim Reassign <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the My Tasks subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> <i>Update</i>: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows

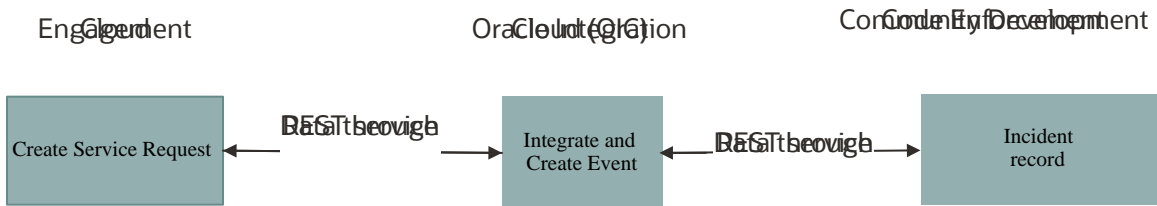
Tab	Displays	Available Actions	Additional Information
			<p>you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes.</p> <ul style="list-style-type: none"> • <i>Release</i>: Unassign the workflow task from your list. This is available only for My Tasks assignments. • <i>Reassign</i>: Change the assignee of the workflow task. This is available only for My Tasks assignments. <p>Note: The My Tasks subtab separates the assigned tasks into two subtabs – Assigned Today and Assigned Earlier, depending on the time of assignment.</p> <p>When you reassign a workflow task to another technician, the My Tasks subtab for the assigned technician will list the task.</p> <p>For information on Workflow, see Using Workflow.</p>

Using Third-Party Integration for Incident Intake

The Oracle Public Sector Compliance and Regulation system enables the intake of code enforcement incidents from external sources, with the implementation of third-party integration.

Incident details are entered in the form of a service request and submitted using a third-party application such as the Engagement Cloud. The Oracle Integration Cloud (OIC) application receives the request, processes the incident details, and sends the incident information to the Code Enforcement environment.

This diagram illustrates the process of third-party integration and intake:



Create Service Request

Use the Engagement Cloud application to enter and submit the details of the reported incident including a description, issue location, and category.

Integration

Oracle Integration Cloud receives the request and process the information to send to Code Enforcement.

Access Intake Records

Processed information in the service request originating from the third-party application is received by Community Development Code Enforcement, and the incident is available for agency staff to access in their Worklist.

For information on integration, see [Creating Integrations](#).

Related Topics

- [Working with Incident Details](#)

4 Managing Incidents

Reviewing Incident Lists

The code technician worklist and the main incident lists display summary information about the listed incidents.

Reviewing Incidents on the Code Technician Worklist

To review incident details on the code technician worklist:

1. From the agency springboard, click the **Code Technician Worklist** tile.
2. Access any tab or subtab that displays incidents.
3. Click the **Report Incident** button, to report a new incident.
4. Review the following summary information about incidents:

Page Element	Description
Incident	This column displays: <ul style="list-style-type: none">○ The incident ID that is assigned based on the agency's autonumbering rules.○ The incident type and subtype, separated by a hyphen.○ The incident status. Unclaimed incidents have a status of <i>Reported</i>.○ The date on which the incident was reported.
Location	Displays the incident address and the incident's district type and district. If district information is missing, a warning icon appears in its place.
Issue	Displays the incident description.
Assigned	Displays the name of the technician or code officer to whom the incident is assigned.
Due By	Displays the date by which the review and processing must be complete. (Processing can be scheduling an inspection, marking the incident as a duplicate, or closing the incident.) If processing is already overdue, a warning icon appears next to the date. The due date is calculated based on your agency's time rules and the date that the incident was submitted.

Page Element	Description
Attachments	Click the attachments icon to open a window with an carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
Actions	Click the Actions icon to quickly complete the following actions: <ul style="list-style-type: none"> ○ Schedule Inspection ○ Mark as Duplicate ○ Reassign ○ Release ○ Reroute Incident ○ Close

5. Click the incident row to access the incident details page.

To return to the code technician worklist, click the **Back** icon in the banner.

For more information about the Incident detail page, see *Working with Incident Details*.

Reviewing Incidents in the Main Incident List

To review incident details on the main incident list:

1. From the agency springboard, click the **Incidents** tile.
2. If automatic routing is on, choose which incidents to view.

Page Element	Description
Show All Incidents	<p>This switch is visible to code enforcement technicians and supervisors when automatic routing is enabled.</p> <p>When the switch is off, these users see only their assigned incidents and other incidents in their area of responsibility, as determined by the issue types and subtype attributes for their job function.</p> <p>When the switch is on, the users can see all incidents, regardless of their area of responsibility.</p>

3. Click the **Report Incident** button, to report a new incident.
4. Review the following summary information about incidents:

Page Element	Description
Incident ID	This column displays:

Page Element	Description
	<ul style="list-style-type: none"> ○ The incident ID that is assigned based on the agency's autonumbering rules. ○ The incident type and subtype, separated by a hyphen. ○ The incident status. Unclaimed incidents have a status of <i>Reported</i>. ○ The date the incident was reported.
Location	<p>Displays the incident address and the incident's district type and district.</p> <p>If district information is missing, a warning icon appears in its place.</p>
Description	Displays the incident description.
Assigned	Identifies the code enforcement technician and the code enforcement officer, if any, who are assigned to this incident.
Reported Date	Displays the date that the incident was created.
Attachments	Click the attachments icon to open a window with an carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
Actions	<p>Displays the three-dot actions menu. This menu is not present for closed incidents.</p> <p>For information about the actions in the menu, see <i>Processing Incidents</i>.</p>

5. Click the incident row to access the incident details page.

To return to the code technician worklist, click the **Back** icon in the banner.

For more information about the Incident detail page, see *Working with Incident Details*.

Claiming and Assigning Incidents

When an issue is reported, an incident is created. Code enforcement supervisors can assign incidents to code enforcement technicians, and technicians can claim incidents. The technician who claims an incident or is assigned to it becomes responsible for managing the incident.

The procedures in this topic describe how to assign or claim incidents from the code technician worklist. The same actions are available from the Incident Details page. For more information about the code technician worklist, see *Using the Code Technician Worklist*. For more information about the Incident Details page, see *Working with Incident Details*.

Overview of Automatic Routing

If you enable automatic incident routing on the Code Enforcement Options page, then incidents are routed to technicians who are responsible for specific issue types and subtypes.

Define a technician's areas of responsibility using the Issue Type and Issue Subtype attributes for the Code Enforcement Technician and Code Enforcement Supervisor job functions:

- Assign a user to an issue type to make the user responsible for all related subtypes
- Assign an issue to a subtype when the user is not responsible for all of the subtypes that belong to the related issue type.
- To give a user responsibility for all types of issues, create an Issue Type attribute row, but leave the attribute value blank.

Note: If you don't set up any issue type or subtype attributes, and you activate the system-level setting for automatically routing incidents, incidents will never be routed to the user.

When automatic routing is active, the Incoming Incidents tab on the code technician worklists shows only the incidents in the user's area of responsibility. Additionally, technicians can only reassign incidents to technicians who have the appropriate area of responsibility.

If there's only one code enforcement technician responsible for a particular issue type or subtype, then those issues are assigned to that technician automatically, and they don't appear on the Incoming Incidents tab unless the technician releases the incident.

Code enforcement supervisors can assign or reassign incidents to any technician. During this process, the list of available technicians is initially limited to those with the appropriate area of responsibility, but the supervisor can select a check box to open up the list to all technicians.

When automatic routing is active, incidents can only be updated by these users:

- Users with responsibility for the incident's issue type or subtype
- Users who are assigned to the incident, regardless of the user's areas of responsibility.
- Supervisors and super users such as a system administrator.

See [Setting Up Agency-Level Options for Code Enforcement](#) and [Setting Up Agency Staff](#).

Claiming an Incident

Claiming is the action that code enforcement technicians take to assign incidents to themselves. Code enforcement supervisors who are also code technicians have to use the Assign action rather than the Claim action to assign issues to themselves.

To claim an incident:

1. From the agency springboard, click the **Code Technician Worklist** tile.

The **Incoming Incidents** tab appears by default. The incidents that appear on the list depend on whether you use automatic routing:

- If automatic routing is off, this tab displays all unclaimed incidents.

- o If automatic routing is on, this tab displays incidents with types and subtypes in the current user’s areas of responsibility.
- 2. Optionally select the **Overdue** or **Priority** subtab to filter the list of incoming incidents.
To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.
- 3. Click the **Claim** button to claim an incident.
Claiming an incident makes you the assigned technician. As the assigned technician, you are now responsible for processing the incident.

Assigning an Incident

Code enforcement supervisors assign incidents to code enforcement technicians. Supervisors who also have the technician job function use the Assign action rather than the Claim action to assign issues to themselves.

To assign an incident:

1. From the agency springboard, click the **Code Technician Worklist** tile.
The **Incoming Incidents** tab appears by default. The incidents that appear on the list depend on whether you use automatic routing:
 - o If automatic routing is off, this tab displays all unclaimed incidents.
 - o If automatic routing is on, this tab displays incidents with types and subtypes in the current user’s areas of responsibility.
2. Optionally select a subtab to further filter the list of incoming incidents:
To return from a subtab to the main Incoming Incidents tab, click the **Back to Incoming Incidents** icon next to the Search icon.
3. Click the **Assign** button.
The Assign a Technician window opens.
4. Use these fields to review the list of technicians:

Page Element	Description
Show All Technicians	This check box appears only if automatic routing is on. Select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident’s issue type and subtype. If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.
Name	Displays the names of available technicians.
Incidents	Displays the number of open incidents that the code technician is currently assigned to.

5. Select a technician by clicking the row with the technician’s name.
6. Click **Save**.

This assignment occurs immediately, and the incident disappears from the Incoming Incidents tab.

Processing Incidents

The code enforcement technician who claims an incident has various options for processing it: scheduling an inspection, marking it as a duplicate, reassigning it to another technician, releasing it back to the pool of unclaimed incidents, rerouting it by updating the issue type or subtype, or closing it.

The following actions are available for processing incidents:

- Schedule Inspection
- Mark as Duplicate
- Reassign
- Release
- Reroute Incident
- Close

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

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

Accessing Incident Actions from the Worklist

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

1. From the agency springboard, click the **Code Technician Worklist** tile.
2. Select the **Incidents** tab to view incidents in *Reported* status where you are the assigned technician.
3. Optionally select a subtab to further filter the list of incoming incidents:
 - Click the **Overdue** tab to display incidents with a due date before the current date.
 - Click the **Priority** tab to display incidents with a priority setting of *Yes*.

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

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

A drop-down list of actions appears.

Accessing Incident Actions from the Incident Details

The Actions button on the Overview section of Incident Details page is identical to the Actions button on the code technicianworklist. Click the button to see a drop-down menu of available actions.

You have two options for accessing incident details:

To access incident details via the code technician worklist:

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

To access incident details via the Incidents list:

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

Scheduling an Inspection When Autoassignment is Active

If the technician who reviews an incident determines that it is a valid incident, the next step is to schedule an inspection. If the code enforcement autoassignment option is active, the system does the work for you.

To schedule an inspection when autoassignment is active:

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

The system schedule an inspection for the next available date. The inspection is assigned to a code enforcement officer who is associated with the incident's district. A confirmation message tells you the inspection date and the assigned officer, and you are done.

Note: In some situations, autoassignment can't be completed. For example, a system-level option sets the maximum number of inspections per day code enforcement officers, so there might not be any eligible officers available on or before the inspection due date. When autoassignment isn't possible, the Schedule an Inspection page opens, and a message explains why the inspection couldn't be scheduled automatically. In this scenario, simply use the Schedule an Inspection page to schedule the inspection manually. When you schedule the inspection manually, you can overbook an officer or set the inspection date past the due date.

Scheduling an Inspection Manually

To schedule an inspection manually:

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

The Schedule an Inspection window opens.

3. Review the following read-only fields for contextual information:

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

Page Element	Description
District Type	Displays the incident's district type, which is inherited from the issue subtype.
District	<p>Displays the incident's district, which is based on the district type and the incident location.</p> <p>The default list of available code officers consists of the code officers who are assigned to this district.</p>

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

The default inspection date is normally the inspection due date. However, if you are scheduling the inspection manually because autoassignment couldn't find an eligible officer before the due date, the default date is the next date that an officer is available without being overbooked.

5. Review any existing comments.

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

6. Optionally add additional comments:

- a. Click **Add Comment**.
- b. In the Add Comment window, enter your comment in the rich text field.

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

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

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

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

The list displays the **Name** of each inspector who is available on the inspection date.

The **Inspection Count** for an officer indicates how many inspections that person is already scheduled to perform on the specified date. A warning icon appears next to the count if choosing the officer would overbook the officer (based on your system setting for the maximum number of inspections per officer per day).

If no inspectors are available, change the inspection date.

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

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

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

Checking for Duplicates and Marking an Incident as a Duplicate

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

1. Access the **Actions** menu for an incident.
2. Select **Mark as Duplicate** from the menu.
The Check for Duplicate window opens. The **Selected Incident** section at the top of the window displays the incident ID, issue type, issue subtype, and address for the incident that you are marking as a duplicate.
3. Click the **Cases** and **Incidents** links to view initial lists of possible duplicates
The search that is performed when you open the page shows active incidents and cases that match the issue subtype and location of the selected incident. Cases and incidents appear in separate lists that appear when you click the corresponding links.
The search results show the case or incident ID, the issue type and subtype, the status, the address, and the reported date.
4. Optionally enter your own search criteria and click **Search** to look for other cases or incidents that the selected incident duplicates.
5. Select the check box for an incident or case that the selected incident duplicates.
6. Click **Mark as Duplicate**, then click **OK** in the confirmation message window.
The original incident status changes to **Closed** with a reason of *Duplicate*. The related issue information is saved so that the Incident detail page for the newly marked duplicate shows which incident or case was duplicated.
After you mark an incident as a duplicate, it no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Reassigning an Incident to Another Technician

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

To reassign an incident to another technician:

1. Access the **Actions** menu for an incident.
2. Select **Reassign** from the menu.
The Reassign Technician window opens. The **Technician Assigned** field displays the name of the current assignee.
3. In the **Select to Change** area, use these fields to review the list of technicians:

Page Element	Description
Show All Technicians	This check box is available to supervisors (but not to technicians) when automatic routing is on. Supervisors can select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype.

Page Element	Description
	If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.
Name	Displays the names of available technicians.
Incidents	Displays the number of open incidents that the code technician is currently assigned to.

4. Select a technician by clicking the row with the technician’s name.
5. Click the **Save** button.

After you reassign an incident, only the newly assigned technician sees the incident on **Incidents** tab of the code technician worklist.

Releasing an Incident

Releasing an incident clears the Technician Assigned field. This sends the incident back to the Incoming Incidents tab on the code technician worklist so that another technician can claim it.

You can only release incidents in *Reported* status that are assigned to you—that is, where you are the assigned code enforcement technician. If the incident has moved past *Reported* status, you can still reassign it, but you can’t release it.

To release an incident:

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

The **Technician Assigned** field is immediately cleared, and the change is saved.

Rerouting an Incident

Incidents are classified based on the issue type and subtype. If automatic routing is enabled, the issue type and subtype route incidents to code technicians with the proper area of responsibility.

The Reroute Incident action enables you to correct an incident’s issue type and subtype. The action is available regardless of whether automatic routing is enabled, but automatic routing ensures that the correctly classified incident is directed to the appropriate code technicians.

Rerouting an incident closes the original incident with a reason of *Rerouted* and creates a new incident.

When the new incident is created:

- Information from fields that are common to all incidents gets copied to the new incident.
This includes the location, the description, whether the issue is a public safety risk, and the name and contact information (if any) from the original incident.
- Data in the original incident’s custom fields are not copied.
- You can review and edit the new incident information before submitting it.

Use this option to add information in any custom fields for the new incident subtype.

- The agency user who reroutes the incident becomes the creator of the new incident. If a public user was signed in while creating the original incident, the user can see the incident using the **Track Your Issues** option. After rerouting, however, the new incident is not associated with the original public user account, and it's not included in the user's issue list. The public user can see that the original issue was closed, and the issue details provide the new issue number.

To reroute an incident:

1. Access the **Actions** menu for an incident.
2. Select **Reroute Incident** from the menu.
The Reroute Incident window opens.
3. Enter the corrected **Issue Type** and **Issue Subtype**.
You must change at least one value before you can continue.
4. Click **Continue**.
The Review page appears.
5. Review the information for the new incident.
6. If you need to add or change information for the new incident:
 - a. Click **Edit** on the review page to make the fields editable.
 - b. Make your changes.
 - c. Click **Done** to return to the review page.
7. Click **Submit**.

The original incident is closed with the reason *Rerouted*, and a new incident is created. A confirmation message provides the ID of the new incident.

If automatic routing is active, the new incident is routed to the appropriate code technicians. Otherwise, the new incident goes into the general pool of unassigned incidents.

Closing an Incident Manually

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

To close an incident:

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

Value	Description
<i>Compliance</i>	No violation has occurred.
<i>Error</i>	The incident was created in error.
<i>Referral</i>	The incident has been referred to another department or agency.

Value	Description

Note: Other close reasons, including *Duplicate* and *Reroute*, are assigned by the system during related processing.

4. Review any existing comments, and optionally add additional comments.

To add new comments:

- a. Click **Add Comment**.
- b. In the Add Comment window, enter your comment in the rich text field.

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

- c. Click **Save** to close the Add Comment window and return to the Close Incident window.

Even if you cancel the Close Incident action, the new comment remains.

5. Click **Save**.

The incident status changes to **Closed**.

After you close the incident, it no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Working with Incident Details

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

Accessing Incident Details

To access incident details from the code technician worklist:

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

To access incident details from the Incidents list:

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

Using the Incident Overview Tab

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

To use the Overview tab:

1. Access the incident.

The Incident page appears and displays the Overview tab by default. If you navigate away from this tab, return by clicking **Overview** in the left frame.

2. Review the incident **Status** and, if the incident is closed, review the closure **Reason**.

The following table describes incidents statuses and reasons:

Status	Description
<i>Reported</i>	<p>This incident has not been processed. The status does not indicate whether the incident has been claimed.</p> <p>The Claim action is available if no technician is assigned. After the incident is claimed, the actions for processing the incident become available.</p>
<i>Inspection</i>	An inspection has been scheduled, and the inspection results have not yet been recorded.
<i>Violation</i>	The inspection resulted in a violation. When this happens, a case is created. The incident becomes read-only. When the case is closed, the incident status also changes to <i>Closed</i> .
<i>Closed</i>	<p>When an incident is closed, the Reason provides additional information:</p> <ul style="list-style-type: none"> ○ <i>Compliance</i>: No violation exists, or the violation has been corrected and the related case has been closed. ○ <i>Duplicate</i>: The incident was closed as a duplicate of another incident or of a case. ○ <i>Error</i>: The incident was created in error, or its related case was closed with a status of <i>Void</i>. ○ <i>Referral</i>: The incident (or its related case) was referred to another department or agency. <p>Technicians who are assigned to incidents can use the Close action manually close the incident with any of these reasons except <i>Duplicate</i>. To close a case as a duplicate, the technician uses the Mark as Duplicate action.</p>

3. Review information that is specific to how the incident has been processed:

These fields are visible when relevant:

Page Element	Description
Case	If the incident was determined to be a violation, this field displays the ID of the case that was created. The ID is a link to the case.

Page Element	Description
Related Incident or	If the incident was closed as a duplicate of another incident, this field displays the ID of the other incident. The ID is a link to the transaction.
Related Case	If the incident was closed as a duplicate of a case, this field displays the ID of the case. The ID is a link to the case.
Referral Type and Referral Code	<p>If the incident was closed as a referral, these fields appear.</p> <p>The referral type indicates if the incident was referred to an <i>Agency Department</i> or to an <i>External Agency</i>.</p> <p>The referral code was selected at the time the incident was closed. For information about referral codes, see <i>Setting Up Referral Bodies</i>.</p>
Rerouted to Incident	If the incident was closed because it was rerouted (assigned a new issue type or subtype), this field displays the ID of the replacement incident. The ID is a link to the incident.
Rerouted from Incident <incident ID>	If the incident was created as a result of rerouting another incident (by changing the issue type or subtype), this message appears next to the incident status. The incident ID is a link to the original incident.

4. Review the following general incident information:

Page Element	Description
Priority	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether the incident is a priority issue.</p> <p>The initial value corresponds to the how the person who reported the incident answered the question Does this issue pose a health hazard or public safety risk.</p> <p>If the incident has been claimed and it is in <i>Reported</i> status, the assigned technician can click the adjacent Edit link to change the incident priority.</p>
Issue Description	<p>Displays a description of the problem that was reported.</p> <p>If the incident is in <i>Reported</i> status, the assigned technician can click the adjacent Edit link to open the Edit Description window and change the description. Even if the technician edits the description, the original issue description still appears on the Details tab.</p>
Service Request ID	Displays the identifier of the service request in the external application. This field appears only if the incident is submitted from an external system.

Page Element	Description
Service Request Source	Displays the name of the external system from which the incident was submitted. This field appears only if the incident is submitted from an external system.
Location	<p>Displays the location of the incident. This can include an address and any additional location information that was provided.</p> <p>If the incident is in <i>Reported</i> status, the assigned technician can click the map marker icon next to the current location to open the Update Location window and select a new location.</p> <p>The technician can type the new location into the address search box or drag the map so that the location crosshairs are over the new location. When the technician closes the window, the new address replaces the old one on this page. The original address still appears on the Details tab.</p>
Reported Date	Displays the date that the incident was originally submitted.
Review Due Date	<p>Displays the due date for code technician to process the incident. Claiming an incident is not sufficient: the technician must close the incident or schedule an inspection. (The inspection does not have to be performed by the review due date—it has its own due date.)</p> <p>The review due date is calculated based on the issue subtype, the date the incident was reported, and the incident priority.</p>

5. Review information about the incident district, and update the information if necessary.

Page Element	Description
District Type ID	<p>Identifies the code enforcement district type for the incident. For example, incidents might be associated with a fire prevention district type.</p> <p>The district type is inherited from the issue subtype and is read-only. However, if the field is blank because the issue subtype doesn't have a district type, you can manually select one. The field becomes read-only after you enter a value.</p>
District	<p>Confirm or update the specific district where the incident is located. This district is based on the district type and the issue location:</p> <ul style="list-style-type: none"> ○ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ○ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel.

Page Element	Description
	<ul style="list-style-type: none"> If the system is unable to determine the district, you can manually enter one. <p>The district determines the default code officers for the incident. For example, if an incident is in fire prevention district 2, then the code officers who are assigned to that district are listed when you schedule an inspection.</p> <p>Code officers are assigned to specific districts using the <i>Code Enforcement Districts</i> attribute of the <i>Code Enforcement Officer</i> job function.</p> <p>For more information about setting job function attributes, see Setting Up Agency Staff.</p>

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

Page Element	Description
Technician Assigned	<p>Identify the code enforcement technician who is responsible for the initial review and processing for the incident.</p> <p>You can update this field directly, or use the Reassign action in the Actions menu.</p>
Inspector Assigned	<p>Identify the code enforcement officer who is responsible for an initial inspection. An inspector is assigned when the inspection is scheduled.</p> <p>This field is editable only if the incident is in <i>Inspection</i> status. When you change the assignment, the system does not check the new assignee's workload. After you assign the new inspector, the assignment is also updated on the corresponding inspection record.</p>

7. If an inspection has been scheduled, review the **Inspection ID** and **Inspection Status** fields.

Click the inspection ID link to open the Inspection Detail page and view the details of the inspection. You view the assigned officer, the inspection outcome along with its reason, and the inspection related dates. The Comments and Attachments sections allow you to view the comments and attachments added by the inspector. You can add your own comments and attachments using the **Add Comments** button and the **Add** icon respectively.

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

Action	Description
Schedule Inspection	Select the inspection date and the inspector for an incident.
Mark as Duplicate	Identify another issue (an incident or a case) that this incident duplicates. Incidents that are marked as duplicates are closed, and the ID of the related transaction appears on the Overview tab.

Action	Description
Reassign	Choose a new code enforcement technician. This action has the same result as directly editing the Technician Assigned field.
Release	Clear the Technician Assigned field.
Reroute Incident	Provide a new issue type and subtype for the incident. If automatic routing is enabled, the incident is routed based on the new values.
Update Tasks	If the incident is associated with a workflow, use this option to update pending workflow tasks.
Close	Close the incident and specify a reason for the closure.

Note: These are the same actions that are available in the code technician worklist on the tabs where code enforcement technicians view their assigned incidents. For more information, see *Processing Incidents*.

Using the Workflow Tab

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

Note: The Workflow tab is available only when the workflow is enabled and associated with the incident. See, *Code Enforcement Workflow Basics*, *Setting Up Agency-Level Options for Code Enforcement* and *Setting Up Issue Subtypes* to understand how to set up and use the workflow.

The Incident Workflow page gives a two-panel view, with a Task panel and Task Details panel. The two-panel view can further be toggled between a stage view and a milestone view. By default, the stage view is displayed.

To manage an incident workflow task:

1. Select the **Incidents** tile on the Agency Springboard.
2. Click the row for the incident you want to view.
3. Use the navigation links in the left frame to select **Workflow**.

The Workflow page appears on the right side of the page.

4. By default, the stage view is displayed. Click the **Milestone View** icon to toggle the view.

Page Element	Description
Stage View and Milestone View icons	Use these buttons to toggle between the stage and milestone views.

Page Element	Description
Stages	<p>Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below.</p> <p>The names of these stages and their labels are displayed as configured in the Oracle Autonomous Integration Cloud (OIC) that are defined by the agency. The stages are represented in different colors to show their status:</p> <ul style="list-style-type: none"> ○ Blue: Active ○ Green: Completed ○ Gray: Not active or Terminated <p>You can click the buttons in the active and completed stages to view their details in the Task Details panel.</p> <p>Examples of stages that appear in an incident's workflow include <i>Reported</i>, <i>Inspection</i>, <i>Violation</i>, and <i>Closed</i>.</p>
Milestones	<p>Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include <i>Start</i>, <i>Incident Reported</i>, <i>Inspection Scheduled</i>, and <i>Today</i>.</p>
Terminate Workflow	<p>Click this button to stop or terminate a workflow.</p> <p>Once a workflow has started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p> <p>Note: You cannot activate a terminated workflow.</p>

5. The tasks and task details are laid out in a two-panel view below the stages or the milestone. The 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"> ○ Task name ○ Task status <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</p>

Panel	Description
	<p>process definition uses parallel gateways, you might see multiple in-progress tasks.</p> <ul style="list-style-type: none"> Assignee <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"> Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	<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> <p>The Incident Workflow page has an option to include a form or a checklist in the Task Details panel. This form is customizable by the agency to cater to their specific requirements.</p>

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.

For details on using comments and attachments in workflow tasks, see the topic *Using Workflow*.

Using the Incident Details Tab

The **Detail** tab on the Incident page displays read-only information from the original issue report.

Note: Because this tab displays the originally reported information, the values displayed here do not get updated when if agency staff updates the corresponding fields on the Overview tab.

To use the Details tab:

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

Page Element	Description
Address	Displays the original location of the incident.
Additional Location Details	Displays any additional location information that was provided. This field appears only if there is any detail to show.
Issue Description	Displays the original description of the problem that was reported.

Page Element	Description
Does this issue pose a health hazard or public safety risk?	Displays <i>Yes</i> or <i>No</i> to indicate whether the issue was marked as a health hazard or public safety risk when it was originally reported. This value is also the initial value for the incident priority shown on the Overview tab.
<User-defined fields>	Displays any user-defined fields from the intake form.
Name, Email, and Phone	Displays contact information for the person who reported the incident. If your agency allows public users to hide their information when reporting an issue, these fields can be blank.

For more information about the parcel associated with this incident, see the *Viewing Incidents Associated with a Parcel* section, in *Viewing Transactions Associated with a Parcel*.

Working With Incident Comments

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

Viewing Incident Attachments

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

To view incident attachments:

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

Attachment information is not labeled, but it consists of the following:

- o A thumbnail showing an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
 - o File name
 - o File size
 - o File description, if one was entered when the file was uploaded.
 - o Date and time that the attachment was uploaded.
4. To view additional details or update the description:
 - a. Click the **Actions** icon for the row and select **View Details** from the menu.
 - b. Review information in these fields: **File Name**, **File Size**, **Uploaded By**, and **Uploaded On**.
 - c. Review and optionally modify the **Description**.
 - d. Click **Cancel** or, if you updated the description, click **Save**
 5. To download a local copy of the file, click the **Actions** icon for the row and select **Download** from the menu.

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

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

Working with Incident Communications

The **Communications** tab on the Incident page enables you to add communications, such as emails, notifications, and texts associated with a specific incident. For detailed information on adding incident communications, see *Working with Incident Communications*.

Viewing Incident History

To view a history of an incident's status change:

1. Access the incident.
2. Click **History** in the left panel.
3. Review the following status history information:

Page Element	Description
Status	Displays the new status after an incident status change.
Updated By	Identifies the person who performed the action that updated the incident status.
Updated Date	Displays the date that the status changed.
Reason	Displays the reason, if any, that is associated with the status change. For example, if a code enforcement technician closes an incident without scheduling an inspection, this field displays the reason that the technician selected when closing the incident.

Related Topics

- [Code Enforcement Workflow Basics](#)

Working with Incident Communications

Incident-specific messages enable agency staff maintain correspondence regarding the progress of incidents.

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

You can configure the Business Rules Framework to trigger the generation of a communication to the designated users. For more details, see [Business Rules Framework Overview](#) and [Setting Up Business Rules](#).

Sending Incident Communications

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

Select an incident on the Incidents page.

Click Communications in the navigation bar.

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

Page Elements	Definition
Channel Type	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none"> ○ <i>Email</i>: Generates an email that is sent to users. ○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message. ○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. <p>Note: The fields that are available to define on this page vary depending on the channel type that you select.</p>
Visibility	<p>Select which type of user can see this message. Values are:</p> <ul style="list-style-type: none"> ○ <i>Applicant and Contacts</i> ○ <i>Agency staff only</i> ○ <i>Applicant</i>
Display Format	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i> ○ <i>Text</i> <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Select, Field, Select an attribute and Insert	<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 Insert to enter a variable for that attribute.</p>

Page Elements	Definition
	<p>For example, if you select the <i>Body</i> field and the <i>Status</i> attribute, and click Insert, the <code>{Status}</code> variable is inserted into the Message Body field of the message. When you send this message, the status of the incident associated with the message is included in the body text.</p>
Create Web Form	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
Insert Web Form	<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>
To	<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>Note: Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p>
Cc and Bcc	<p>Enter the email addresses of the people or organizations that you want to receive a copy of the message.</p> <p>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
From	<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>Note: 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>
Subject	<p>Enter a brief description of the purpose and content of the message.</p>

Page Elements	Definition
	<p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Message Body	<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> display format, you can enter only plain, unformatted text.</p> <p>For the <i>HTML</i> display format, 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.
<i>Number</i>	Enables the recipient to enter a numeric 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 Incident Communications

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

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

Select an application on the Incidents 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:

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

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

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

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

5 Managing Inspections

Overview of Mobile Oracle Municipal Code Officer

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

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

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

Viewing the Worklist

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

- View the inspection job list. Inspections are categorized in tabs and each listed with a count of inspections: All inspections, ready inspections, inspections for the current day, next day, first, current week, overdue, re-inspections, and completed inspections.

Note: Ready inspections tab lists: (a) Inspection jobs for the incidents that are ready for their initial inspection. (b) Inspection jobs for the cases that have crossed the compliance date. Ready inspections are listed with a Green icon to indicate that they are ready for inspection. For details about inspections, see *Using the Code Officer Worklist*.

- Sort the inspections by due date, scheduled date, issue subtype, priority, and address of the location under inspection.
- View the status of the incident.
- View the inspections in a map view.
- Record a new violation.
- Reschedule inspections.
- Add attachments and comments.
- View details of the inspection job.

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

Opening the Map View

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

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


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

Working with Inspection Details

Access the Inspection page by selecting an inspection item on the Worklist page. On the Inspection page you view the details of the inspection assigned to you:

- Inspection count (configured by the administrator on the Inspection Count page).
- Inspection identifier.
- Status.
- Location.
- Description.
- Inspection due date.
- Compliance date.
- List of code violations and their corrective actions.
- List of all previous inspections.

On the Inspection page you can initiate actions such as:

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

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

Reporting a New Violation

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

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

1. On the Worklist page click the **Action** menu and select **New Violation**.
You can also access the New Violation button from the **Action** menu on the Inspection page.
2. Select the type and subtype of the issue you want to report.
3. Use the map page to locate the property for which you are reporting the violation.
4. Enter a description of the issue. You can also attach a photo, video, or an audio file as reference.
5. Enter any additional information, if present.
6. In the **Code Violations** section, click **Add** to open the Select Codes page and include one or more code violations from a list of current or other violations. The related corrective actions are automatically added to the form. You can modify the descriptions for violations and corrective actions using Rich Text formatting actions, and save. To delete a violation record and its related corrective action, click the **Delete** icon.
7. Select one or more code violations from a list of current or other violations.
8. Review the details and submit the form.

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

Rescheduling an Inspection

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

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

Submitting Inspection Results

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

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

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

Statuses and result options available for an incident:

Status at the time of inspection	Result of the inspection
Inspection	In compliance: The status of the incident changes to Compliance and the inspection is closed.
	<p>Violation: A case is created with a status of Violation and a re-inspection is scheduled, which must be updated by the code enforcement officer.</p> <p>When you update the result as in violation, the incident details page allows you to change the issue type, issue subtype, code violations, address, and issue description. On the incident details page, click the Update button:</p> <ul style="list-style-type: none"> • Search and select the desired issue type and subtype. • Click Next to open the Code Violations page and add code violations. • Click Next to open the Review page, where you can use the Edit icon to make changes to location, issue description, code violations. <p>Note: Additionally, you will see any custom fields that were available at the time of creating the incident.</p> <p>After adding the changes, click Done.</p> <ul style="list-style-type: none"> • Click Submit to create a case with the newly entered details. <p>See Viewing Case Information</p>
	Referral: The status of the incident changes to Referral and the inspection is closed. The referral body that is configured on the Referral Body page is used for the referral incident.
	Closed: The inspection and the incident are closed.

Statuses and result options available for a case:

Status at the time of inspection	Result
Violation	In compliance: The status of the case changes to Compliance and the inspection is closed.
	<p>Remains in Violation:</p> <ul style="list-style-type: none"> • The status of the case and the compliance date remain unchanged. • A notice is created, which must be updated by the code enforcement officer before printing it.
	<p>Issue Citation:</p> <ul style="list-style-type: none"> • The status of the case changes to Citation and the inspection is closed. • The compliance date is extended. • A notice is created, which must be updated by the code enforcement officer before printing it. • A re-inspection is scheduled, which must be updated by the code enforcement officer.
	Extension:

Status at the time of inspection	Result
	<ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up.
	<p>Mandatory Abatement:</p> <ul style="list-style-type: none"> The status of the case changes to Mandatory Abatement and the inspection is closed. The compliance date remains unchanged. The code technician schedules an inspection.
Legal	<p>When a case status is Legal, the case is transferred to the legal department. Any inspection schedule is canceled and no new inspection can be scheduled.</p>
Citation	<p>In Compliance: The status of the case changes to Compliance and the inspection is closed.</p>
	<p>Remains in Citation: The status of the case and the compliance date remain unchanged.</p>
	<p>Issue Citation:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up. A notice is created, which must be updated by the code enforcement officer before printing it. A re-inspection is scheduled, which must be updated by the code enforcement officer.
	<p>Mandatory Abatement:</p> <ul style="list-style-type: none"> The status of the case changes to Mandatory Abatement and the inspection is closed. The compliance date remains unchanged. The code technician schedules an inspection.
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up.
Mandatory Abatement	<p>Abatement Complete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.</p>
	<p>Abatement Incomplete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.</p>

Installing and Configuring Oracle Municipal Code Officer

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

Oracle Public Sector Compliance and Regulation Code Enforcement provides a mobile inspections application for agency staff to download and install on their mobile devices. The Oracle Municipal Code Officer mobile application is not intended for use by the public. Although the Oracle Municipal Code Officer mobile application is intended mainly for phones, you can download the application to other mobile devices, such as tablets.

Before You Begin

Before you begin installing and configuring the Oracle Municipal Code Officer mobile application, you must have:

- An agency staff profile

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

- Appropriate security

Agency administrators must explicitly grant mobile application access to you. Use the *Mobile Application Activation* link that you have received from your administrator to access the application. The only role that has access to the mobile application is the code enforcement officer.

For more information for agency system administrators setting up profiles and security, see [Setting Up Users for Oracle Mobile Applications](#).

Installing Oracle Municipal Code Officer

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

Configuring the Oracle Municipal Code Officer Environment

To configure Oracle Municipal Code Officer:

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

You must agree to proceed to the next step.

3. The confirmation page appears with the Application Host URL automatically populated. Click the **Get Started** button.
4. As the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.

5. Select the **Save user ID** check box, if desired. The next time you return after logging out, you don't have to reenter your user ID.
6. After your login credentials are successfully authenticated, the setup page appears with a progress bar displaying the progress of the package download.
7. After installation completes, the application home page – Worklist – appears for the current day.

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

Using the Code Officer Worklist


The code officer worklist provides a central location for managing code enforcement inspection tasks on a laptop or desktop computer. Various tabs list inspection records based on where they are in their life cycle, and action menus provide quick access to the tasks that can be performed at each stage.

Tip: As code officers, you can access your inspections on a phone as well as on a laptop or desktop computer. The layout changes based on the device you're using. For detailed information about mobile inspections, see [Overview of Mobile Oracle Municipal Code Officer](#).

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

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

The code officer worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Inspections  – Indicates that the incident or case is ready for inspection.	List of all inspections assigned to the officer. Detail page shows the inspection information and provides access to comments and attachments. Inspections that are listed with a Green icon signify that they are ready for inspection.	List page: <ul style="list-style-type: none"> • Attachments • Comments • Reschedule • Cancel • View Details Detail page: <ul style="list-style-type: none"> • Update Result: <i>In Compliance, Violation, Referral, Closed</i> • Reschedule 	For details about result options, see the section Submitting Inspection Results in Overview of Mobile Oracle Municipal Code Officer . Submitting the details will create a case with the details provided. See Viewing Case Information .
Today	List of all inspections that are due on the current date. Detail page shows the inspection information and provides access to comments and attachments.	Same as listed above.	

Tab	Displays	Available Actions	Additional Information
Ready	List of Inspections related to incidents and cases that have passed their compliance date.	Same as above.	
First Inspections	List of all new inspections. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	Same as listed above.	See the next section.
Reinspections	List of reinspections. These are the follow-up inspections after the first inspection is complete with a result. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	Same as listed above.	See the next section.
This Week	List of all inspections that are due in the current week. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	Same as listed above.	See the next section.
Overdue	List of inspections from cases that have passed their inspection due date. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	Same as listed above.	See the next section.
Completed Inspections	List of all inspections with status as <i>Completed</i> . Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	None	See the next section.
Assigned Cases	List of all the cases assigned to the officer for inspections. Detail pages show the complete details of the case.	List page: Create Case: Create a new case. Actions: Select and choose from options <i>Attachments</i> , <i>Comments</i> , and <i>Update Status</i> .	For information about case details, see <i>Processing Cases</i> .

Tab	Displays	Available Actions	Additional Information
Incoming Tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in officer or the officer group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> • Claim • Reassign <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the My Tasks subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> • Update: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes. • Release: Unassign the workflow task from your list. This is available only for My Tasks assignments. • Reassign: Change the assignee of the workflow task. This is available only for My Tasks assignments. <p>When you reassign a workflow task to another officer, the My Tasks subtab for the assigned officer will list the task. For information on Workflow, see Using Workflow.</p>

Using the Code Enforcement Inspection Page

As a code enforcement officer, you manage the inspection details of your assigned incident or case using the Code Enforcement Inspection page.

Code enforcement technicians schedule inspections for incidents and cases. For details about assigning inspectors and scheduling inspections, see [Processing Incidents](#) and [Working with Code Enforcement Inspections](#).

Access the Code Enforcement Inspection page by selecting an inspection record in the Code Officer Worklist.

Inspection Detail Tab

The inspection detail tab displays the summary information about the scheduled inspection – status, scheduled date, address of the location, issue description, assigned inspector, comply by date, and inspection completion date.

You can take the following actions related to your inspection:

- **Update Result:** Click the button to select a result option after the inspection. The options available are based on factors such as, if the inspection is for an incident or a case, if it is the first inspection or reinspection, and the status of the incident or case:
 - In Compliance
 - Violation
 - Referral

- o Closed
- o Void
- o Issue Citation
- o Remains in Violation/Citation
- o Mandatory Abatement
- o Extension

When you are updating the result as in violation, the system allows you to change the issue type, issue subtype, code violations, and the address:

- a. Click the **Update** button to open the Issue Type confirmation Page and select the desired issue type and subtype.
 - b. Click the **Next** button to open the Code Violations page and add code violations.
 - c. Click the **Next** button to enter or update the address location and click Done.
- **Reschedule:** Click the button to open the Inspection page and select a new date for the inspection.
 - **Cancel :** Click to cancel the inspection

Attachments Tab

The Inspection Attachment tab allows you to view and add attachments related to the inspection. For details about attachments, see *Processing Incidents*.


Comments Tab

The Inspection Comments tab allows you to view and add comments related to your inspection. For details about comments, see *Processing Incidents*.

Code Violations Tab

The Code Violations tab allows you to manage the code violations that were entered at the time of creating the issue and during previous inspections.

Code officers can add new violations and their corresponding corrective actions for the current inspection.

Page Element	Description
Add button	Click to open the Select Codes page and add one or more violations. You can select from a list of current and other violations. Click Done after selecting the violation records. The corresponding corrective actions are also added and listed on the Code Enforcement Inspection page.
	Click the icon to open the Violation page and modify the summary or description. You can use the Rich Text formatting options in the description. Clicking the Edit icon for a corrective action will open the Corrective Action page and you can change the text of the corrective action using the Rich Text formatting options. Click Done after making the changes.

6 Managing Cases

Reviewing and Claiming Cases

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

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

- Viewing a case summary on the Code Technician Worklist page and then clicking the **Claim** button.
The code technician claiming an incident is by default the assigned technician for the case. This option is used for claiming a new case created directly — without a reported incident.
- Using the Case Overview page to directly update the **Technician Assigned** field.

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

Reviewing and Claiming Cases Using the Code Technician Worklist

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

Page Element	Description
Case	This column displays: <ul style="list-style-type: none">○ The case ID that is assigned based on the agency's autonumbering rules.○ The issue type and subtype, separated by a hyphen.
Creation Date	Displays the date on which the case was created.
Location	Displays the location of the issue.
Issue Description	Displays the description of the case
Case Status	Displays the status of the case, for example, <i>Compliance</i> , <i>Violation</i> , <i>Citation</i> , and so on.
Comply by	Displays the last date to ensure compliance.

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

- a. Click the **View More Details** icon to access the Case page.
 - b. On the Case page, review the information on the Overview, Details, Inspections, Notices, and other tabs. See *Navigating to Case Details*.
 - c. Click the **Back** icon in the banner at the top of the page to return to the worklist, and re-navigate to the Unassigned Cases tab.
5. Click the **Claim** button to claim the case.
Claiming a case makes you the assigned technician. As the assigned code technician, you are now responsible for processing the case.

Reviewing and Claiming Cases on the Case Detail Page

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

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

Processing Cases

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

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

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

Using the Cases Page

1. Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. You can perform these actions to display cases that meet specific criteria:

Page Element	Description
Download	Click the download button to export the list to a .csv file.
Search	Search by alphanumeric characters on the fields for cases in the list. The cases that meet the search criteria are displayed on the page.

Page Element	Description
	When you search on dates, use this format: MM/DD/YYYY.
Filter By	<p>Apply filters to display cases that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</p> <p>You can use the predefined filters <i>Case</i>, <i>Creation Date</i>, <i>Issue Description</i>, <i>Case Status</i>, and <i>Comply By</i>.</p> <p>Case filter is not available in the worklist.</p>
Sort By	<p>Select an option to sort the cases in the list by these fields:</p> <ul style="list-style-type: none"> ○ <i>Case</i> ○ <i>Creation Date</i> ○ <i>Location</i> ○ <i>Issue Description</i> ○ <i>Case Status</i> ○ <i>Comply By</i>

Managing Case Activity

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

Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.

2. On the Cases page, you can locate the basic information about the case using the following information:

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

Page Element	Description
Case Status	View the status of the case, for example, <i>Closed, Compliance, Violation, Void, Mandatory Abatement</i> and Legal. For details about the options, see Viewing the Case Detail Overview .
Comply by	View the last date to ensure compliance.
Actions	Click to perform actions such as updating status.

Creating a Case

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

To create a case:

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

The fields on this page are configured by the agency administrator who creates the intake form for the issue subtype. For more information about the issue intake form, see [Using the Intake Form Designer for Code Enforcement](#).

7. On the Code Violations page, click **Add**. Select one or more code violations from a list of current or other violations and click **Done**. Click **Next**.
8. Review the information you entered on the Review page and click the **Submit** button.

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

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

Navigating to Case Details

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

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

To access the case detail pages:

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

Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.

2. The Cases page lists only the cases that are assigned to the logged in technician. Turn on the **Show All Cases** switch to view all the cases in the system.

Locate the case you are working with and click the **View More Details** button on the case row.

3. Navigate to case information using the links in the left panel.

The information for a case comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected case with links to more detail. See <i>Viewing the Case Detail Overview</i> .
Timeline	View all the Code Enforcement events associated with a particular case in a chronological order. See <i>Working with Case Timeline</i> .
Property Information	View parcel data from the case and a map of the parcel location. See <i>Working with Case Property Information</i> .
Workflow	View the workflow status of each task as defined by the agency using Oracle Autonomous Integration Cloud (OIC). See <i>Using Workflow</i> .
Inspections	View a list of inspections scheduled for the case. You can also schedule inspections from this page. See <i>Working with Code Enforcement Inspections</i> .
Notices	View a list of notices sent for the selected case. You can also generate notices from this page. See <i>Working with Notices</i> .
Code Violations	View a list of code violations related to the case. You can also add additional code violations from this page. See <i>Working with Code Violations</i> .

Page Name	Description
Comments	Review or add comments pertaining to this case. See <i>Working with Comments</i> .
Attachments	View a list of files and upload or download documents on this page. See <i>Working with Attachments</i> .
Appeals and Hearings	View a list of appeals and hearings that are raised for the case. See <i>Working with Appeals and Hearings</i> .
Responsible Parties	View the details of the party responsible for the violations leading to the case. You can also add a responsible party from this page. See <i>Adding Responsible Parties</i> .
Citations	View a list of citations issued for the case. You can also issue citations from this page. See <i>Working with Citations</i> .
Fee and Payments	Review citation fees assessed and payments due. See <i>Working with Citation Fees and Payments</i> .
Case History	View a list of updates that were made to the case such as changing the case status or the compliance date, along with the reason for the update. See <i>Working with Case History</i> .

Viewing the Case Detail Overview

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

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

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

Using the Overview Page

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

Alternatively, you can select the **Cases** tile on the Agency Springboard

2. On the Cases page, click **View More Details** for the case row you want to access.
3. On the Overview page, review details or enter the following information in the **Overview** section:

Page Element	Description
<p>Case Status</p>	<p>Review the case status:</p> <ul style="list-style-type: none"> ○ Violation ○ Closed ○ Compliance ○ Void ○ Mandatory Abatement ○ Legal <p>To change the status of the case, click the Edit link to open the Update Status page, select a new status value, and enter a reason for the change. Click Done.</p> <p>If the new status is Violation or Citation, you select the new compliance date. The system allows you to generate a new notice and any applicable citation fee, and a corresponding inspection is scheduled. Selecting the Legal status cancels the scheduled inspections and no new inspection, appeal, or hearing can be scheduled.</p>
<p>Inspector Assigned</p>	<p>Assign an inspector to the case by using the look-up prompt.</p>
<p>Technician Assigned</p>	<p>Assign a technician to the case by using the look-up prompt.</p> <p>The Assign Technician page lists only the technicians that are associated with the issue type and subtype of this case. Select the Show All Technicians check box to list all the technicians.</p> <p>Note: This check box is available to agency staff with appropriate permissions, only when the <i>Autoassignment</i> option is turned on.</p> <p>Technicians can claim cases from the code technician worklist. To access the code technician worklist, select Code Technician Worklist on the Agency Springboard and click the Unassigned Cases tab. See <i>Using the Code Technician Worklist</i>.</p>
<p>Issue Description</p>	<p>Review the description of the issue. To update the description, click the Edit link to open the Update Issue Description page and change the description text. Click Done.</p>
<p>High Priority</p>	<p>Indicates the priority of the case. To update the priority, click the Edit link to open the Update Case Priority page, select the switch, and use the calendar to select a new compliance date. Click Done.</p>

Page Element	Description
Compliance Date	<p>Review the date by which the case must ensure compliance, which is calculated based on the time rules set up by the agency. If there is no compliance date recorded, the page shows the Add button. You can click to open the Compliance Date page and enter the compliance date. Click Done.</p> <p>To update the compliance date, click the Edit link to open the Update Compliance Date page, select a new date from the calendar, and enter a reason for the change. Click Done.</p>
Appeal By	<p>Indicates the last date by which a user is allowed to submit an appeal for the case.</p> <p>An Edit link is available for a supervisor to change the appeal due date. Click the Edit link to open the Update Appeal by Date page, use the calendar to select a new date, and enter a reason for the update. Click Done.</p> <p>Note: The Edit link is displayed only after the compliance date is set.</p>
Reported Date	Review the date on which the incident was reported.
<number> days to comply	Review the number of days left to ensure compliance.

- In the **Responsible Parties** section, the **Access Number** field displays a unique identifier, which is generated at the time of case creation. The responsible party must provide the access number at the time of requesting access to their case. See *Resolving Issues*.
- In the **Inspections** section shows the next inspection due date.
See *Using the Code Officer Worklist*.
- Review important information about the selected case in separate sections on the Overview page. Click the **View Details** link to navigate to the page. Only those sections that contain data records to show are displayed in the overview page.

Working with Case Timeline

With case timeline, you can view all the Code Enforcement activities associated with a particular case in a chronological order. You can drill down for additional information for each event or filter the timeline to show by event types.

The Case Timeline shows a list of code enforcement case events in a chronological order with the newest on top. The event types include:

- Incident reported

- Inspection
- Case created
- Case updated
- Appeal
- Hearing
- Fee paid
- Notice

Viewing a Case Timeline

The Timeline page shows the list of all the time-based events for the case. You can view the case timeline and perform actions on the Timeline page.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Timeline** in the left panel to open the list of case events.

Page Element	Description
Filter button	Filter the cases based on event types, such as, All, Appeal, Case created, Hearing, Case updated, Inspection, Notice, Fee paid and Incident reported .
Print button	Print a copy of the current timeline.
Download button	Download the case events to an Excel spreadsheet.
Show List View button	Display the case events in a list view. The details displayed include the date and time, the event type, case status, name of the agent who created or updated the event, and the reason or description of the event. Click the chevron at the end of each row to go to the Case Overview page.
Show Timeline View button	Display the case events in a horizontal timeline view. The date range is set to start from 30 days before the initial event and to end 30 days after the last event.

Working with Case Property Information

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

Viewing Parcel Information

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

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

Changing Property

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

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

Updating Property Address

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

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

Viewing Cases Associated with a Parcel

Agency staff can view summary of cases that are associated with a parcel on the Transactions page, Cases tab.

For more information, see [Viewing Transactions Associated with a Parcel](#).

Using Workflow

Workflow provides a defined structure for the business licenses, permits, planning applications, and code enforcement 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 don't 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 and update the status of the workflow task to indicate the result, such as setting the status to *Complete*. 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

Workflow tasks are defined in workflow process definitions within Oracle Integration Cloud (OIC). Agency staff manages these tasks using the Workflow page in the details of a business license, permit, planning application, and code enforcement – incident or case page.

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*.

Note: You can view the workflow information for applications currently being processed as well as completed applications, if needed.

Managing Workflow Tasks

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

For Code Enforcement – Incident and Case, the Workflow pages give a two-panel view which can further be toggled between a stage view and a milestone view.

For other applications like Business Licenses, Permits and Planning Applications, the Workflow page gives 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.

Using the Stage View or Milestone View in Workflow for Code Enforcement

The Code Enforcement – Incident and Case Workflow pages display in a two-panel view, with a Task panel and Task Details panel. The two-panel view can further be toggled between a stage view and milestone view. In the stage view, the agency staff gets a quick indication of the number of stages in the workflow as buttons at the top of the page. You can click a stage to view details in the task panels below.

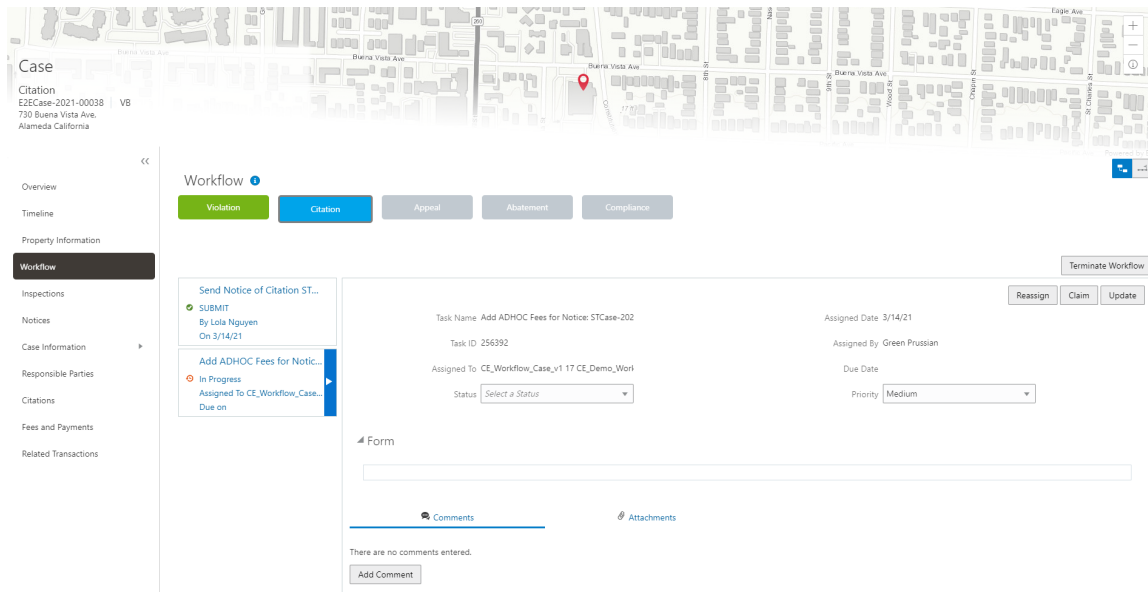
In the milestone view, the agency staff can see a time line of tasks and dates on which they were completed for the selected incident or case at the top of the page. Details are displayed in the task panels below. By default, the Code Enforcement – Incident and Case Workflow pages display a stage view.

To access Incident or Case Workflow page in the two-panel, stage view:

1. Select the **Incidents** or **Cases** tile on the Agency Springboard.
2. Click the row for the incident you want to view. Or click the **View Details** button for the case you want to view.
3. Use the navigation links in the left frame to select **Workflow**.

By default, the Workflow page for Code Enforcement displays stage view, showing the two-panel view below.

This example illustrates the Code Enforcement – Case Workflow page in a two-panel, stage view.



Page Element	Description
Stage View and Milestone View icons	Use these buttons to toggle between the stage and milestone views.
Stages	<p>Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below.</p> <p>The names of these stages and their labels are displayed as configured in the Oracle Integration Cloud (OIC) that are defined by the agency. The stages are represented in different colors to show their status:</p> <ul style="list-style-type: none"> ○ Blue: Active ○ Green: Completed ○ Gray: Not active or Terminated <p>You can click the buttons in the active and completed stages to view their details in the Task Details panel.</p> <p>Examples of stages that appear in an incident's workflow include <i>Reported</i>, <i>Inspection</i>, <i>Violation</i>, <i>Legal</i>, and <i>Closed</i>.</p>
Terminate Workflow	<p>Click this button to stop or terminate a workflow.</p> <p>Once a workflow has started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p>

Page Element	Description
	<p>Note: You cannot activate a terminated workflow.</p>
Form	<p>Use the form to review any information entered by the code enforcement officer or to enter your own information.</p> <p>Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. The agency can customize the form for their specific requirement.</p>

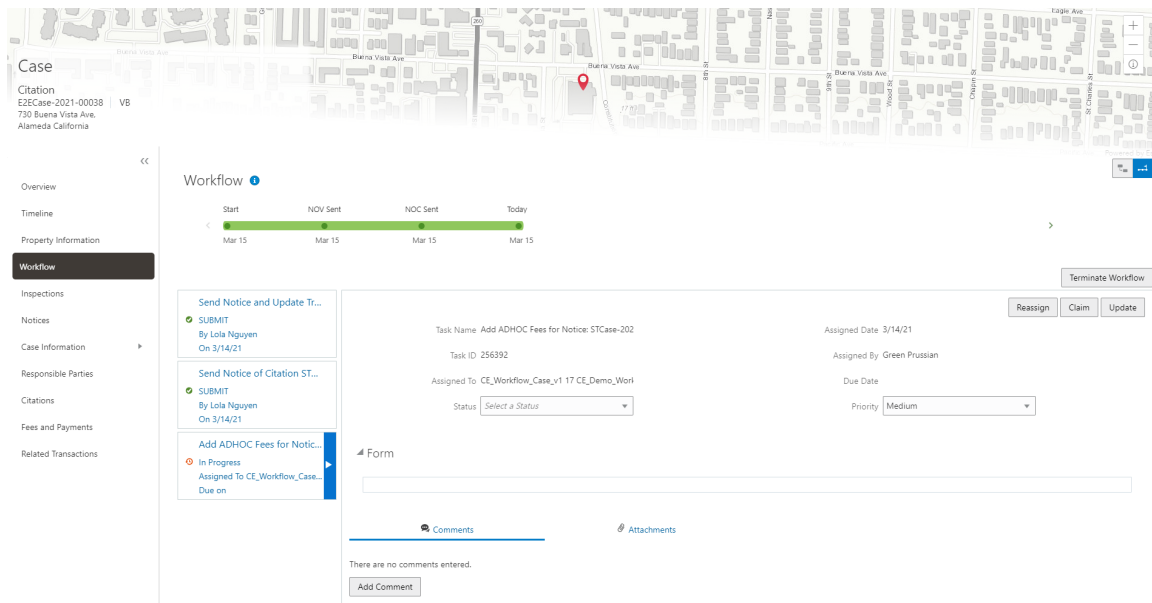
To access the Incident or Case Workflow page in the two-panel, milestone view:

1. Select the **Incidents** or **Cases** tile on the Agency Springboard.
2. Click the row for the incident or case you want to view.
3. Use the navigation links in the left frame to select **Workflow**.

The Workflow page appears on the right side of the page.

4. By default, the stage view is displayed. Click the **Milestone View** icon to toggle the view.

This example illustrates the Code Enforcement – Case details workflow page in a two-panel, milestone view.



Page Element	Description
Stage View and Milestone View icons	Use these buttons to toggle between the stage and milestone views.

Page Element	Description
Milestones	Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include <i>Start</i> , <i>Incident Reported</i> , and <i>Inspection Schedule</i> .
Terminate Workflow	<p>Click this button to stop or terminate a workflow.</p> <p>Once a workflow had started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p> <p>Note: You cannot make a terminated workflow active again.</p>
Form	<p>Use the form to check or enter information as specified by the agency.</p> <p>Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. This form is customizable by the agency to cater to their specific requirement</p>

Using the Two-Panel View in Workflow for an Application

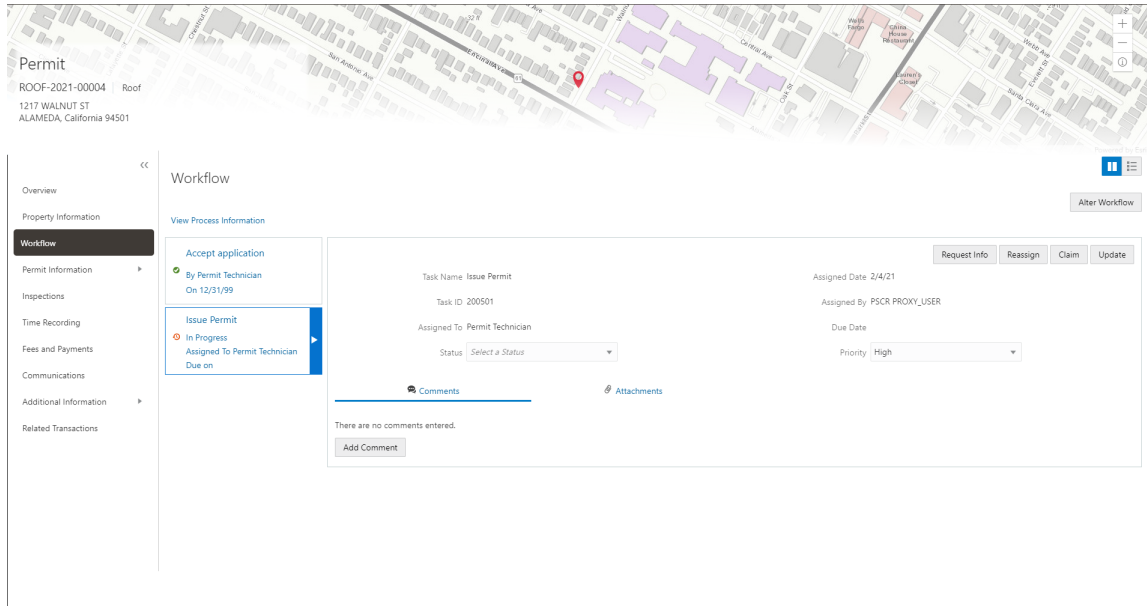
To manage workflow tasks in a two-panel view:

1. Select the **Business Licenses, Permits, Planning Applications, Incidents, or Cases** tile on the Agency Springboard.
2. Click the row for the business license, permit, planning application, incident or case you want to view.
3. Use the navigation links on the left side of the screen to select **Workflow**.

Note: By default, the Workflow page displays the list view for Permits, Planning and Zoning, and Business Licenses.

4. Click the **Show Two-Panel View** button to display the two-panel view.

This example illustrates the Permits Workflow page in a two-panel view.



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"> ○ Task name ○ Task status <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"> ○ Assignee <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"> ○ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	<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>

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.

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

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

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

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

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

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

Page Element	Description
Status	<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>Planner Assigned</i>, <i>Specialist Assigned</i>, <i>More Info Needed</i>, and <i>Reject</i>.</p> <p>Note: Task statuses are not the same as application status. However, the workflow engine can update the application status based on the outcome of a task.</p>
Priority	Set the priority to <i>High</i> , <i>Medium</i> , or <i>Low</i> . The priority is informational only.

9. 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. Processing time can vary.

Using a Form in Code Enforcement – Incident and Case Workflow Pages

Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. The agency can customize the form for their specific requirement.

An example of an incident task having a form can have the following checkpoints for the agency staff:

- Check if Repeat Offender
- Send Courtesy Notice

An example of an abatement task having a form can have the following checkpoints for the agency staff:

- Schedule Inspection Post Abatement
- Add Fee
- Send Notice

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**.

Requesting Additional Information

If additional information is required or questions need to be answered prior to advancing a transaction along in the workflow, you can click the **Request Info** button. This disables the **Status** and the **Priority** fields to keep the transaction in the current state while the requested information is reviewed. After clicking the **Request Info** button, the name of the button toggles to **Accept Info**, which you click after you have reviewed the additional information submitted to enable the **Status** and the **Priority** fields again.

After clicking **Request Info**, the status of the current workflow task reads *Information requested* until you click the **Accept Info** button. The status appears on the Workflow tab in the transaction details, the Worklist, and the Task Management page.

Note: The **Request Info** and **Accept Info** buttons are optional to display, and also note that **Request Info** and **Accept Info** are the default labels for the buttons. You can add your own labels if needed, depending on the task. You can hide and provide custom labels using custom properties in the workflow process definition for any human task. For more information on workflow process definition custom properties, see *Using Custom Properties*.

Viewing the Overall Workflow (List View) 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:

- o The **Task Name** and **Status**.
 - o The **Last Updated Date**.
 - o 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.
 - o **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 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:
 - o **New Workflow Activity Name:** Select the desired workflow step.
 - o **Update Transaction Status:** Select the proper status for the workflow step. You can't alter a workflow step back to a pending status.
 - o **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 redo the alter request and try again.

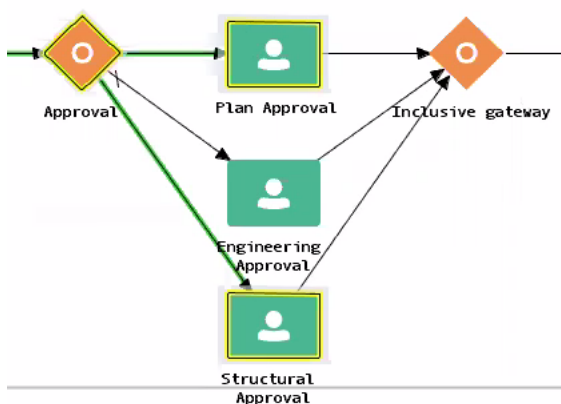
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- 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 displays 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

View Workflow Save Cancel

Related Topics

- [Code Enforcement Workflow Basics](#)

Working with Code Enforcement Inspections

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

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

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

Note: As part of the inspection process, an inspector performs inspections, add comments and attachments, and submit a result of the inspection. If the submitted result is Violation or Citation, all the entered details are captured and made available on the Inspections page of the case. The Inspections page can be accessed by the agency staff only on a laptop or a desktop computer. For details on managing inspection on a mobile device, see [Overview of Mobile Oracle Municipal Code Officer](#). For details about managing inspections on a laptop or desktop computer, see [Using the Code Officer Worklist](#).

Viewing Inspection Information

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the case you are working with by clicking the **View More Details** button.

3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, you can view inspection information in these fields:

Page Element	Description
Schedule Inspection	<p>Click to open the Schedule page and use the calendar to select from the dates that the assigned inspector is available for an inspection.</p> <p>Note: This option is available only if there are no pending inspections scheduled. The status of all the inspection schedules must be either Completed or Canceled.</p>
Inspection	<p>View the number of inspections carried out till date for the case.</p> <p>The format of the inspection count is set up by the agency administrator on the Inspection Count page. See <i>Setting Up Inspection Counts</i>.</p>
Inspection Status	<p>View the status of the inspection:</p> <ul style="list-style-type: none"> ○ Completed ○ Scheduled ○ Canceled
Assigned To	Identifies the inspector assigned to the case.
Scheduled Date	View the date on which the inspection is scheduled.
Inspection Completion Date	View the date on which the inspection was completed.
Inspection Outcome	<p>View the result of the inspection.</p> <ul style="list-style-type: none"> ○ In compliance ○ Violation ○ Referral ○ Remains in Violation ○ Issue Citation ○ Remains in Citation ○ Extension ○ Mandatory Abatement ○ Closed

Page Element	Description
	For more information about submitting inspection results, see Overview of Mobile Oracle Municipal Code Officer .
Reschedule	Click to open the Schedule page and use the calendar to select the next available date for the assigned inspector to schedule the inspection. Note: This option is available only for inspections that are not completed.
Canceled	Click to cancel the inspection schedule. Note: This option is available only for inspections that are not completed.

Viewing Inspection Detail

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

Scheduling Inspection

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

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

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

Rescheduling and Canceling Inspection

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

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

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

Working with Notices

Once a case is created, a corresponding notice object is automatically created and access is made available in the Code Technician Worklist and in the case details. As agency staff, you generate a notice from the notice object, update the various details, review, edit, and print it for dispatch. Agency staff can also manually create ad hoc notices for a case.

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


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

Viewing Notices

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

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

Page Element	Description
Notice ID	View the identifier of the notice.

Page Element	Description
Notice	View the generated name of the notice, based on the nature of violation.
Notice Type	View the type of notice: <ul style="list-style-type: none"> • Ad hoc • System generated
Case Status	View the status of the case: <ul style="list-style-type: none"> • Violation • Citation
Status	View the status of the notice: <ul style="list-style-type: none"> • <i>Pending</i>: Indicates that the notice object is created. • <i>In Progress</i>: Indicates that details are entered in the notice and saved. • <i>Generated</i>: Indicates that the notice is generated and printed. • <i>Sent</i>: Indicates that the notice has been sent to the responsible party. • <i>Received</i>: Indicates that the notice was received by the responsible party.
Sent Date	View the date on which the notice was dispatched.
Tracking Number	View the tracking number associated with the shipment of the notice.
Attachment	Icon to indicate that an attachment is present in the notice.
Received Date	View the date on which the notice was received by the responsible party.
Actions	Select from available options, which are based on the status of the notice: <ul style="list-style-type: none"> • <i>Generate</i>: Click to open the Generate Notice page and enter details to generate the notice. This option is available only for the notice records in Pending status. • <i>Continue</i>: Click to open the Generate Notice page and complete the details of the previously saved notice. This option is available only for the notice records in In Progress status.
	Click to open the Edit Notice Details page to enter additional details about the notice, such as tracking details. This option is available only for the notice records that are in Generated, Sent, or Received status.

Creating an Ad Hoc Notice

To manually create an ad hoc notice for a case:

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

3. On the Add Ad Hoc Notice page, select an ad hoc notice subtype from the list. You can use the Search option to search for and select the ad hoc notice subtype applicable for the case. Selecting the ad hoc notice subtype returns you to the Notices page.
4. In the Notices page, you can see the new ad hoc notice listed.

Generating a Notice

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

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Generate** button.
 - Note:** This option is available only for the notice records in Pending status. If the status is in In Progress, you will see the **Continue** option. Use this option in case the notice was generated earlier and saved for later.
3. On the Generate Notice page, the top section shows notice information such as the name, issue type and subtype. The middle section has the following page elements:

Page Element	Description
Do you want to edit the notice?	Turn on this switch, to download and edit a generated notice.
Download and Edit	Click this button to download the generated notice in the rich text format (RTF) or in a portable document format (PDF).
Upload Edited Document	Click this button to re-upload an edited notice either as RTF or PDF.
Review and Print	Click this button to open the generated notice in a new window. You can review the details, print the document, and send it to the responsible party.

Note: The sections below for editing notice details and entering tracking details are displayed only when it is relevant to the notice.

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

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

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

4. Click **Save Changes**. You can close the window and return to the notice at a later time. You can use the **Continue** button to access this page later.

5. Click **Complete** on the Generate Notice page. The status of the notice record changes to Generated and the record is removed from the worklist. You can access the record on the Notices page, which lists all the notices records for the case.

Editing Notice Details

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

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

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

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

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

Working with Code Violations

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

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

Agency staff such as a code technician manage the code violations using the Code Violations page in case details. For more information on mobile inspections, see [Overview of Mobile Oracle Municipal Code Officer](#).

Viewing Code Violations

View a list of code violations that were added by the inspector and the technician, along with their corrective actions to resolve the violation.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Case Information** and then select **Code Violations** in the left panel to open the list of code violations.
4. Expand each code violation record to view the description and the related corrective actions.
5. As agency staff you can use the **Edit** icon to modify the summary and descriptions for violations. You can also modify the description for corrective actions. The Description field enables you to use Rich Text formatting options for the text you enter. Use the **Delete** icon to delete a violation and its corrective action.

Adding Code Violations

You add code violations to a case using the Select Codes page.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Click **Case Information** and select Code Violations in the left panel to open the list of code violations.
4. Click the **Add** button to open the Select Codes page, search, and select violations. The Selections tab shows the code violations you have selected:

Page Element	Description
Current violation and Other violations	<ul style="list-style-type: none"> ○ Current violation: View a list of code violations associated with the issue subtype that was selected at the time of recording the issue or violation. ○ Other violations: View a list of all the code violations in the system.
Search look-up	<p>Search by entering the name of a specific code violation using the look-up.</p> <p>Select one or more code violations using the check boxes and click Done to include them in the case.</p>

5. Click **Done** to add the selected violation to the case and return to the Code Violations page.

Working with Comments

This topic discusses how to use comments. Agency staff can view, modify, and add comments on the Comments page for a transaction, contractor license, case, or incident.

Note: Applicants and contacts can view and add comments to their own permits as well as update and delete the comments they added. Before contacts can manage comments, your agency must add the PSC Contact User duty role (ORA_PSC_CONTACT_USER_DUTY) to the PSC Custom Registered Public User role (CUSTOM_PSC_REGISTERED_PUBLIC_USER) and enable permit access for the contact type.

Adding Comments

You view, modify, 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 Modifying Comments

1. Access the detail page for the transaction, contractor license, 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.

3. You can modify, 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, contractor license, 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 **Hide from Public** icon, to hide a comment from public view and also toggle between hide and show.

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 display the text you enter. See *Managing Comments* to enable the option of **Rich Text Editor** formatting.

4. Click **Save** 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 * (asterisk) button on the comment row. The *Favorite* tab will add the comment to its list. Your agency administrator decides the duration for which a comment can be called *Recent*. The duration can be set up on the Manage Comments page.

See *Managing Comments*.

Working with Attachments

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

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

Note: Applicants and contacts can view and add attachments to their own permits as well as update and delete the attachments they added. Before contacts can manage attachments, your agency must add the PSC Contact User duty role (ORA_PSC_CONTACT_USER_DUTY) to the PSC Custom Registered Public User role (CUSTOM_PSC_REGISTERED_PUBLIC_USER) and enable permit access for the contact type.

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 or record detail pages, including pages for permits, planning applications, cases, business licenses, and contractor 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 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](#).

For more information about managing attachments associated with a contractor license, see [Managing Contractor License Details](#).

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.

Note: The page elements may vary on the Attachments page depending on the type of transaction or record.

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
File Name	View the following information in the Filename field: <ul style="list-style-type: none">○ Icon indicating the file type○ Filename with file type extension○ <i>File Size</i>

Page Element	Description
Description	View the description of the attachment as entered by the person who added the attachment.
Source	<p>View the source of the attached file. Valid values are:</p> <ul style="list-style-type: none"> ○ <i>Permits</i> ○ <i>Inspection</i> ○ <i>Workflow</i> ○ <i>Plan Reviews</i> <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>Note: This column appears only on the All tab for permits.</p>
Uploaded By	View the name of the person who uploaded the file along with the date and time that the person uploaded the file.
Category and Subcategory	<p>View the document category for the attachment.</p> <p>The category and subcategory are available when a document group is specified during setup for the transaction type or in the contractor license options.</p> <p>Note: This field is not available for case and business license attachments.</p>
Actions	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> ○ <i>View Details</i> ○ <i>Download</i> ○ <i>Delete</i> <p>Note: 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>

Page Element	Description
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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 file name 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. For contractor licenses, you can update the referenced person in the **Assigned To** field.

Downloading Attachments

There are multiple ways to download attachments.

To download 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 **Select Multiple** icon above the grid.
4. Select one or more documents to download.
5. Click the **Download** icon.

To download a single 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 **Select Multiple** 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 Appeals and Hearings

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

Registered public users can request appeal for their case as a responsible party, using the Resolve Issue page. Permissions to access the case is issued by the agency staff after the user requests access. For information about registered users requesting access and requesting appeals, see *Resolving Issues*.

Code officers such as a code technician can directly schedule hearings for a case, independent of appeals.

Viewing Appeals and Hearings

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **View More Details** for the case row you want to access.
Alternatively, you can access the Appeals and Hearings page by selecting the **Cases** tile on the Agency Springboard. Click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel.
2. The Appeals and Hearings page lists all the appeals and hearings for the case:

Page Element	Description
Source	Review the details of the record: <ul style="list-style-type: none"> ○ Source – Appeal or Hearing ○ Responsible Party ○ Date of creation
Hearing Body	Review the name of the hearing body that is assigned to the case hearing.
Hearing Date	Review the date on which the hearing is scheduled.
Status	View the status of the hearing: <ul style="list-style-type: none"> ○ <i>Not Scheduled</i>: The hearing is not scheduled. ○ <i>Scheduled</i>: The hearing is scheduled. ○ <i>Completed</i>: The hearing is completed with a decision outcome.
Responsible Party	Review the name of the responsible party for the case.

Page Element	Description
Attachments	View attachments related to the hearing.
Actions	<p>Click to view the actions you can perform on the record, which are based on the status of the case – Hearing or Appeal:</p> <ul style="list-style-type: none"> ○ <i>Schedule Hearing</i>: Select to schedule a hearing by selecting a hearing body and an available date. ○ <i>Reschedule Hearing</i>: Select to change the hearing date. ○ <i>Update Hearing Decision</i>: Select to enter the decision made in the hearing and add corrective actions. ○ <i>Cancel</i>: Click to cancel the appeal or hearing.

Adding an Appeal

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

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

Page Element	Description
Appellant	View the name of the responsible party.
Appeal Date	View the appeal date, which is the current date.
Appeal Reason	Enter the reason for requesting the appeal.

5. Click **Save**. The new appeal for the case is created with a case status of Appeal, and any scheduled inspection is canceled.

Adding a Hearing

You can directly schedule a hearing for a case, without an appeal request. To add a hearing:

1. Access the Appeals and Hearings page.
2. Click **Add Hearing** to open the Schedule Hearing page.

Page Element	Description
Appeal Source	View the source of the appeal, which is Hearing
Hearing Body	Select the hearing body from the available list.
Hearing Date	Select a hearing date from the available options, which is determined by the schedules of the hearing body and the agency.
Responsible Party	View the name of the responsible party related to the case.

3. Click **Save**. The new hearing for the case is scheduled with a case status of Hearing, and any scheduled inspection is canceled.

Updating Hearing Decision

After the public hearing is completed and the hearing body announces their decision, the assigned code technician updates the decision in the case details using the Appeals and Hearings page.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab.
Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **Actions** and select **Update Hearing Decision**.
You can also navigate using the case list. Select **Cases** on the Agency Springboard to view a list of all cases. On the Cases page, click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.
2. Click the **Action** button on the row of the appeal or hearing you are working with and click **Update Hearing Decision**.
Note: This option is not available for a completed appeal row.
3. Enter the decision related information on the Update Hearing Decision page:

Page Element	Description
Hearing Body	View the name of the hearing body assigned for the hearing.
Hearing Date	Select an available date for the hearing.
Responsible Party	View the name of the responsible party for the case.
Hearing Decision	Select the hearing decision from options set up by your administrator.

Page Element	Description
	<p>Examples of decision options can be <i>Compliance</i>, <i>Not in Compliance</i>, <i>Continue</i>, <i>No Outcome</i>, and others.</p> <p>If you select the option related to non compliance, you must change the status of the case in the New Case Status field.</p>
Decision Date	Enter the date on which the hearing decision was taken.
New Case Status	<p>Select the new status for the case:</p> <ul style="list-style-type: none"> ○ Legal ○ Violation ○ Citation ○ Mandatory Abatement <p>This option appears if you have selected the <i>Not in Compliance</i> hearing decision.</p> <p>If the new status is Violation or Citation, you select the new compliance date. The system allows you to generate a new notice and any applicable citation fee, and a corresponding inspection is scheduled. Selecting the Legal status cancels the scheduled inspections and no new inspection, appeal, or hearing can be scheduled.</p> <p>Depending on the status you select, the workflow stages and their tasks are accordingly updated.</p>
Comments	Enter any text for reference.
New Compliance Due date	Select a date by which the responsible party must ensure compliance. This option appears if the new status of the case is violation or citation.
New Citation Due date	Select a date by which the responsible party must pay the citation fee. This option appears if the new status of the case is citation.
Corrective Actions	Click Add to open the Corrective Actions page, search and select one or more corrective actions from a list. You can edit the description of each of the actions using the Rich Text formatting option.
Attachments	Click Add to open the Attachments page and include any documents.

4. Click **Save** to close the Update Hearing Decision page and show the updated records on the Appeals and Hearings page. Depending on the options selected, the status of the case changes and the workflow stages and their tasks are updated. See *Using Workflow*.

Also, an inspection is scheduled as needed, a citation record is created, and a notice is sent to the responsible party. See [Working with Code Enforcement Inspections](#), [Working with Notices](#), and [Working with Citations](#).

Adding Responsible Parties

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

Viewing Responsible Parties

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.

Page Element	Description
Responsible Party	View the name of the party responsible for the reported violation.
Mailing Address	View the address of the responsible party. You can view the location of the address on a map at the top of the page.
Email	View the email address of the responsible party.
Type	View the type of the responsible party. For example, owner.
Online Access Status	Displays the status of the online access that was requested by the responsible party: <ul style="list-style-type: none"> ○ <i>Not Requested</i> ○ <i>Pending Approval</i> ○ <i>Issued</i> ○ <i>Denied</i>
Actions	Select from these options to allow or deny access to responsible parties for this case: <ul style="list-style-type: none"> ○ <i>Allow Access as Owner</i> ○ <i>Allow Access as Contact</i> ○ <i>Deny Access</i> <p>These options are available only if a responsible party has requested access to this case. Once the access is issued, the responsible party can access their case details using the Resolve Issue page and take actions such as submitting appeals. See Resolving Issues.</p>

Page Element	Description
	<p>Note: These actions are also available to the assigned code technician on the Access Requests tab in the Code Technician Worklist.</p>

- To view more information about the online access activity, click **View Details** for the responsible party record.

The detail page shows the Online Access section only if the responsible party has requested for online access, using the Resolve Issue page.

Adding Responsible Parties

- Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
- On the Cases page, select the **View More Details** button for the case you are working with.
- Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
- Click the **Add** button to open the Search Responsible Party page and search the required parcel.
- Click **Select**.
- Click **Save**.

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

Updating Responsible Party Detail

- Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
- On the Cases page, select the **View More Details** button for the case you are working with.
- Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
- Click the row of the responsible party to update the details.
- On the Edit Responsible Party page, you can change values for all fields except for the Type and Country.

To enter an address, begin by entering the **Postal Code**. As you enter the code, the type-ahead list shows values that include appropriate state and city 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, click the **Don't know** link that appears when the postal code field is blank. Clicking this link displays a full set of address fields.

- Click **Save**.

Deleting Responsible Party

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

Working with Citations

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

Viewing Citations

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

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

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

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

Issuing a Citation

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

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

Page Element	Description
Description	Enter a description about the citation.

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

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

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

Working with Citation Fees and Payments

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

Viewing Fees and Payments for a Case

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the case.
4. On the Fees and Payments page, view a list of total fees, as well as a list of separate fee items. **Pay** buttons are displayed, when you have fee items due for payment. Use the pay buttons to pay either all the balance amount which is due or pay only a particular fee item.

Page Element	Description
Total Fees, Total Payable, Total Payments in Process, Total Paid, Balance Due, and Pay button	The top section on the page displays the consolidated details for all the fees items displayed in the grid below. You can also use the Pay button here, to pay the total balance due for the selected case.
Fee Item	The identifier of the fee.
Fee Reference ID	The identifier of the fee.
Amount	The amount due for the fee.

Page Element	Description
	<p>Note: Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see Setting Up Issue Subtypes.</p>
Currency	The currency in which the fees are paid.
Status	<ul style="list-style-type: none"> ○ Paid ○ Processing payment ○ Due
Due Date	The date by which the payment must be made.
Assessed Date	The date on which the fee was assessed.
Payment Date	The date on which payment was received.
Payment Reference ID	The identifier of the payment.
Pay button	A Pay button available on each row allows you to make the payment for the particular fee item. To make the full payment that includes all the fee items due, click the Pay button next to Balance Due .

Note: Presently the code enforcement fee module supports the configuration of only one fee item for each fee decision model. See [Setting Up Fee Schedules](#).

Viewing Fee Item Details

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

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

Adding an Ad Hoc Fee Item

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the case.
4. On the Fees and Payments page, click **Add** (+ button) to add an ad hoc fee item.

Page Element	Description
Fee Item	Search and select a fee item. If a Fee Item is associated with a department, then the Department field gets automatically populated when you select the fee item.
Amount (USD)	Enter the amount for the ad hoc fee.
Status	<ul style="list-style-type: none"> ○ Canceled ○ Due ○ Suspended ○ Pending (Default selection) <p>Fee items with a status of <i>Pending</i> are not added in Balance Due in the Fees and Payments page.</p> <ul style="list-style-type: none"> ○ Paid
Department	The department that calculates the fee amount.
Assessed Date	The date on which the fee was assessed.
Due Date	The date by which the payment must be made.
Comments	Add comments pertaining to this fee item.

5. Click **Save** to save the changes.

Paying Citation Fees

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click the **Pay** button to access the Checkout page.

Use the **Pay** button in each row to individually pay for each fee item, or use the **Pay** button next to the **Balance Due** to pay all balance fees together.

5. Click the Information icon next to the **Total Amount to Be Paid** to preview the fee items before making the payment.
6. Depending upon the agency's payment integration setup, various modes of payment are available, such as **Credit Card, Debit Card, PayPal** or **Cash**. Choose the payment method and click the **Make Payment** button to access the Payment Details modal.
7. Verify details on the Payment Details page and click **Done**.
8. The Cash Drawer page shows the details of the transaction. Click **Save** to save the changes and go to the Payment Successful page.
9. Click the **Print Receipt** button to print the payment receipt.
10. Click the **Back** link to return to the Fees and Payments page.
11. In the Fees and Payments page, **Payment Reference IDs** are generated for the paid fee items. Click the link to view a receipt with details such as, receipt number and date, reference number, amount paid, item details, and payment method.

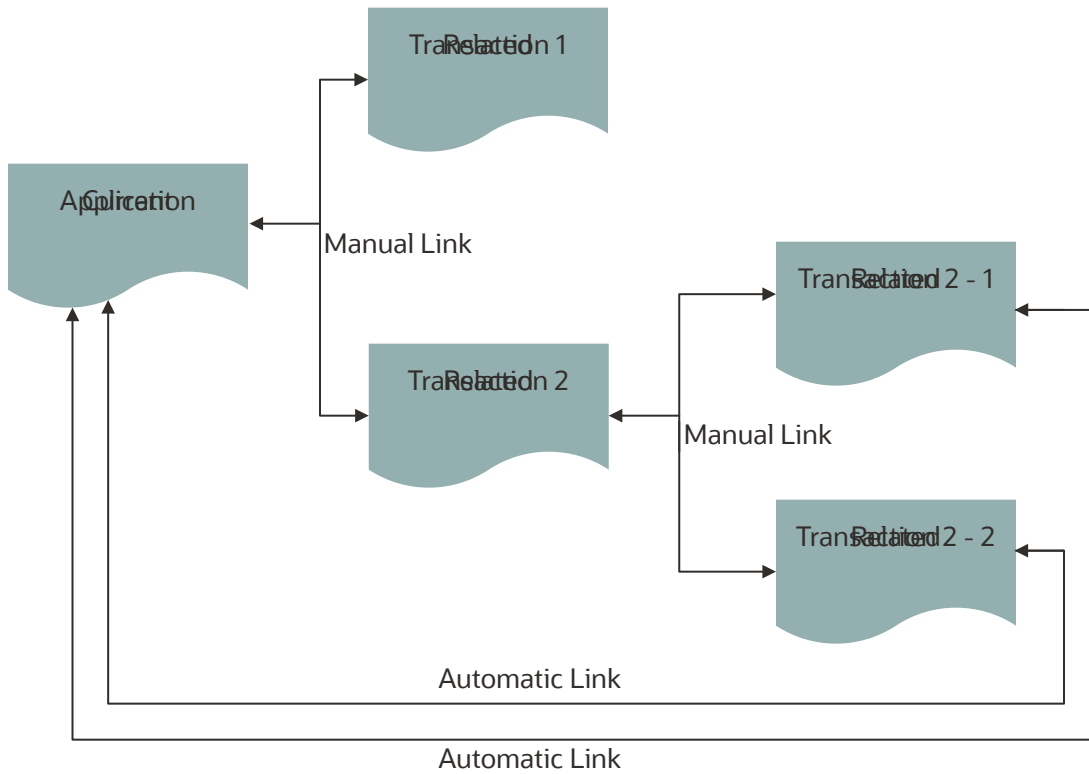
Working with Related Transactions

Applicants and agency users can link their consultation, business license, permit, or planning applications to other transactions using the Related Transactions page. Agency staff can establish links between transactions and code enforcement cases. Only agency staff such as a code technician have access to the Case – Related Transactions page and are allowed to drill down to the case detail from other transactions. Public users do not have access to related transactions for cases.

As agency staff you can establish relationships between transactions and then perform actions such as viewing the related transaction applications, marking them as primary or sub-application, and removing the link.

The following diagram shows the related transactions linking for a selected application:

Related transactions linking



Viewing Related Transactions


The Related Transactions page lists all the transactions linked to the selected application including those transactions that are in turn linked to the transaction you have linked. To view all the related transactions:

1. Access the Transactions page for your consultation, business license, permit, or planning application from the Agency Springboard. For Code Enforcement, access the Cases page.
2. Select the business license, permit, case, 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 and view related transactions added by applicants, contacts, and agency staff.

Note: For code enforcement cases, only agency staff can add and manage related transactions.

4. View the details of the linked transactions:

Page Element	Description
	View the relationship of the linked transaction application with the selected application.
Transaction	View the identifier of the linked transaction, a link to access the application detail, and the type of application.

Page Element	Description
	<p>Note: The detail link is available only for agency staff. Public users accessing this page for their transaction can only view the identifier of the application or case. They cannot drill down to the detail page.</p>
Status	View the status of the transaction or case and the date of update.
Description	View the description of the transaction.
Source	<p>View the detail related to the linking of the transaction:</p> <ul style="list-style-type: none"> ○ <i>Manual or Automatic linking:</i> The transactions that are manually linked to this application show as Manual and the other transactions that are indirectly linked show as Automatic. For example, if you link transaction 1 to your application X, then the Related Transaction page on your application X shows 1 as <i>Manual</i> and any other transaction that is linked to 1 shows as <i>Automatic</i>. ○ <i>Primary or Sub-application:</i> The relationship of the linked transaction with the selected application ○ <i>Linked by <user> with <date>:</i> The user (staff or public user) who linked the transaction, with the date of linking.
	Click and choose from options to mark a transaction as primary, sub-application, for removing the link, or for applying conditions of approval to permits. See a separate section on performing actions.

Adding a Related Transaction

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

Code enforcement case related transactions are created and managed only by agency staff such as a code technician.

Note: Linking option for related transactions is set up in Functional Setup Manager (FSM). For details on setting up the related transactions for your agency, see [Setting Up Agencies - Setting Up Related Transaction Linking](#).

To link a business license, permit, case, or planning application to a transaction:

1. Access the Transactions page from the Agency Springboard.
For cases, access the Cases tile from the Agency Springboard.
2. Select the business license, permit, case, 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** button to open the Link Transaction page, which lists the applications you can link. Agency staff can access the list of cases in a separate tab. These pages list all the active applications and cases related to the selected property or case. Enable the **Show All** switch to view all the applications or cases in the system.

Note: If no property is associated with the application or case, then all applications are listed by default.

5. Select all the desired applications or cases using the check boxes and then click the **Add Selected** button to establish a link between the transaction applications. The Link Transaction page closes to show the Related Transactions page, which now lists the new transaction rows.

Performing Actions on Related Transactions

Agency staff and public users such as applicants and contact users with appropriate permissions can mark related transactions as primary or sub-application. Only agency staff can manage related transactions for code enforcement cases.

As an applicant or contact user you can remove the link between related transactions from your transactions. This is not applicable to code enforcement cases.

Agency staff have access to all transactions to remove related transaction links.

Click the Actions menu and select from:

- Mark as Primary
- Mark as Sub-application
- Remove Application Link (Not available for an automatically linked transaction)
- Apply Conditions of Approval: Add conditions of approval to the current permit.

Note: This option is available only for permits.

See *Working with Permit Conditions of Approval*

If a transaction is marked as Primary, its **Actions** menu will show the option to mark it as Sub-application. Likewise, if a transaction is marked as Sub-application, its action will show the option to mark it as Primary.

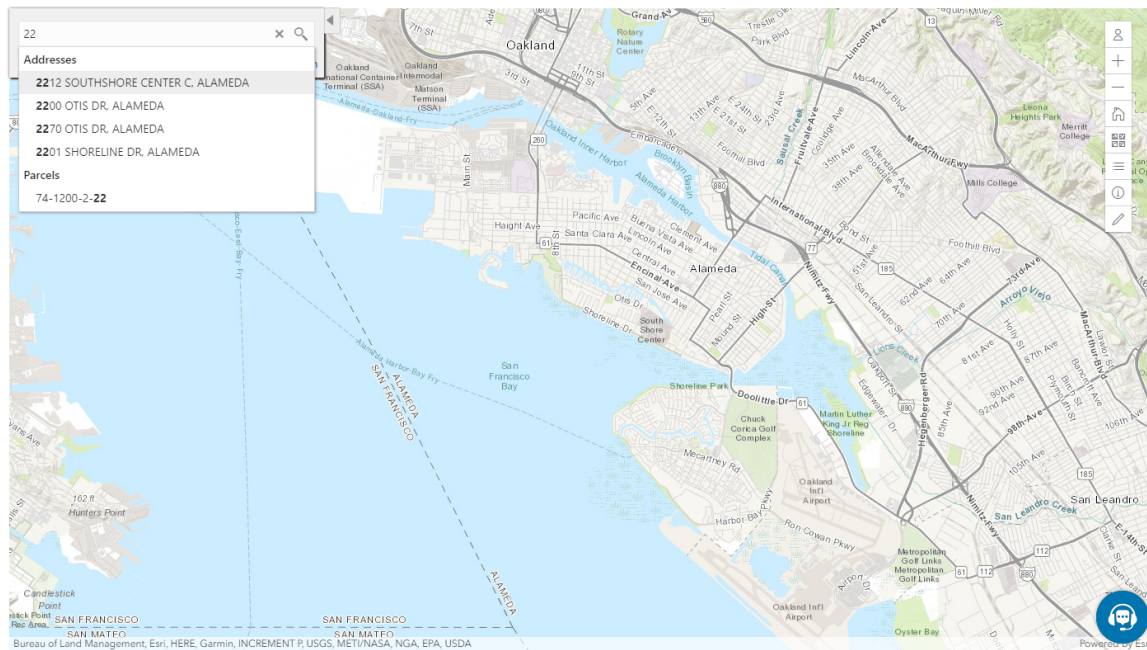
7 Working with Maps

Overview of Delivered Maps

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

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

This example shows the 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 Main Map in the drop-down menu that appears.	<ul style="list-style-type: none"> View existing applications and projects. Search and select properties.

Map Name	Users	Navigation	Usage
			<ul style="list-style-type: none"> View transactions for a selected property. Start new applications for selected properties. Access an interactive guide for selecting application types.
Guest/anonymous user map	Anonymous public users	Guest users click the Explore Your City tile on the landing page.	<ul style="list-style-type: none"> View existing applications and projects. Search and select properties. View transactions for a selected property. Access an interactive guide for selecting application types. <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 Explore Your City tile on the landing page.	<ul style="list-style-type: none"> View existing applications and projects. Search and select properties. View transactions for a selected property, and filter transactions so that only the user's own items appear on the map. Start new applications for selected properties. Access an interactive guide for selecting application types.

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 Property section of a new or submitted application, then click the Map View icon.	Choose properties and other GIS objects to associate with the application. <i>See 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 Overview of Mobile Oracle Inspector for Permits .
Permit list	Agency staff Registered public users	For agency staff: access the application lists on the Transactions page. For registered public users: access the application lists on the Applications page. On any of these pages, click the Map View icon.	View the locations of the transactions on the list. See Managing Transactions .
Public notification	Agency staff	<ul style="list-style-type: none"> Click the Map icon in the page header, then click Public Notification in the drop-down menu that appears. From the Planning Application detail page, select a hearing where the schedule is final, then select the Actions button and choose Generate Notifications from the menu that appears. 	Create a notification zone by specifying a distance from selected parcels. After creating a notification zone, download.csv files with parcel, address, and owner information for all parcels that are at least partially within the zone. See Creating Map-Based Public Notification Lists .

Maps for Code Enforcement

This table lists additional maps that support code enforcement:

Map Name	Users	Navigation	Description
Agency - code enforcement	Agency staff	On the Code Technician Worklist page, go to a tab for managing incidents and then click the Map View icon.	View the locations of incidents that appear on the selected worklist tab. See Using the Code Technician Worklist .
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 Reporting Issues .
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the Location of the incident option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application. See Overview of Mobile Oracle Municipal Code Officer .

Map Name	Users	Navigation	Description
Public - code enforcement	Registered and anonymous public users	On the code enforcement landing page, click the View Recent Issues 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:


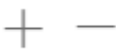






Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options. When you click this icon, a list of map profiles appears. 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 Enable Zoom switch on the map profile.	Use these tools to zoom in or out. You can also double-click a map location to zoom in.
	Show Default Map View	Use the Enable Default Map View switch on the map profile.	Click to restore the map to its default (home) display area.
	Select Base Map	Use the Enable Base Map Gallery switch on the map profile.	Click to display a pop-up window for selecting a map type such as <i>Streets</i> or <i>Topographic</i> .
	Select Layers	Use the Enable Map Layers switch on the map profile.	Click to display a pop-up menu for changing the visibility of various map layers. Examples of layers include the parcel layer and address layer provided by the map service.
	Show Attribution (for maps in page headers)	This toolbar button is not configurable. Some maps have this button, while other maps, such as Explore Your City, display attribution information across the bottom of the map page.	Click to display a pop-up window that identifies the third-party map sources.
	Identify GIS Information (for maps that are not in page headers)	This tool appears if the Enable Map Layers switch is on and the map service URL for the profile is configured to allow the display of object details on the map.	Click to enable the display of object details for map objects (such as parcels) that you click. Details appear in a pop-up window. To stop displaying object details, click the button again to turn off the option to identify GIS information. The map profile settings for Enable Window Detail Docking and Detail Window Dock Position control where the object detail window appears. However, on mobile devices, the detail window always appears at the bottom of the screen..
	Show Selection Tools or Hide Selection Tools	Use the Enable Selection Tools switch on the map profile.	Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map.

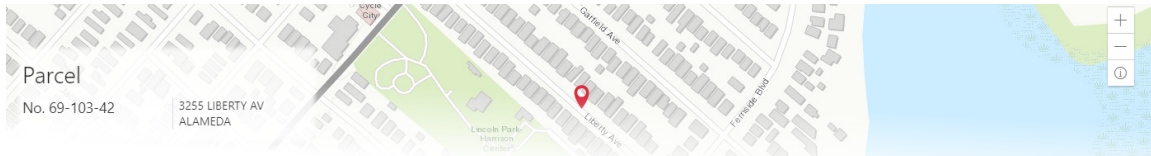
Viewing Map Markers

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.

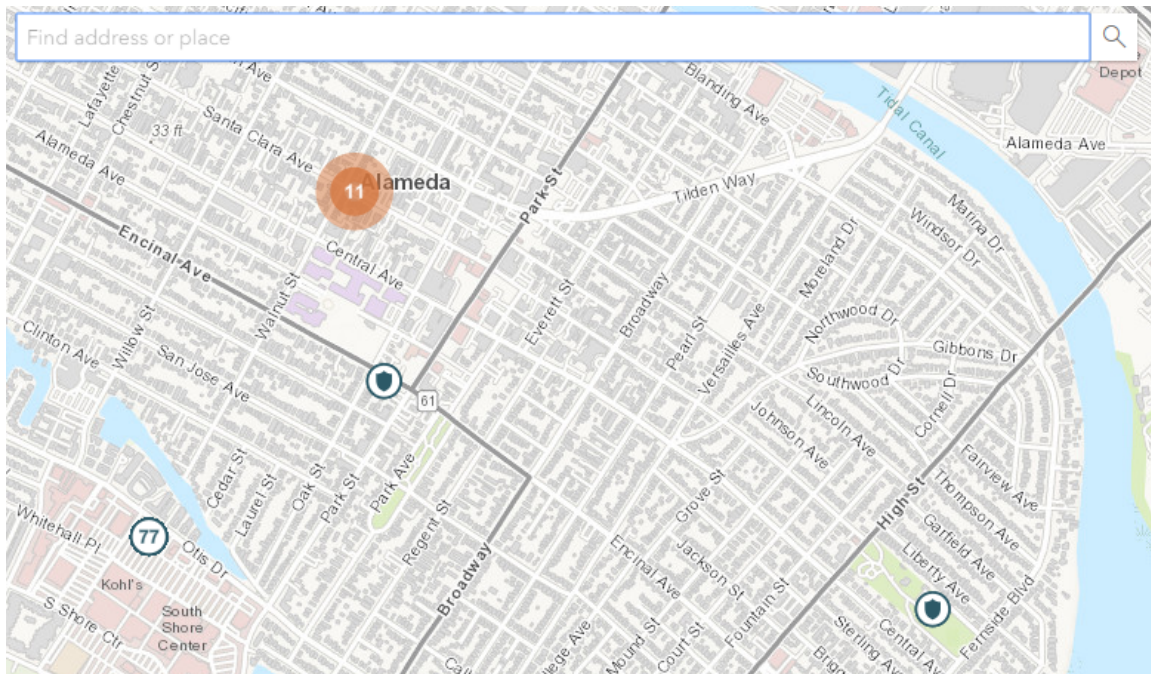


Other Map Markers


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.

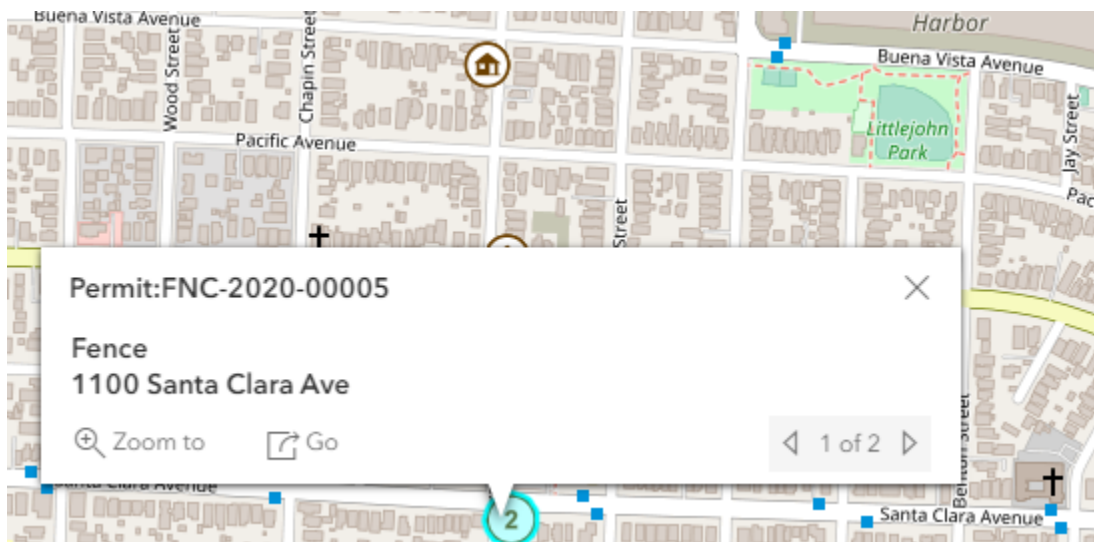
Map Marker	Description
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions. 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.

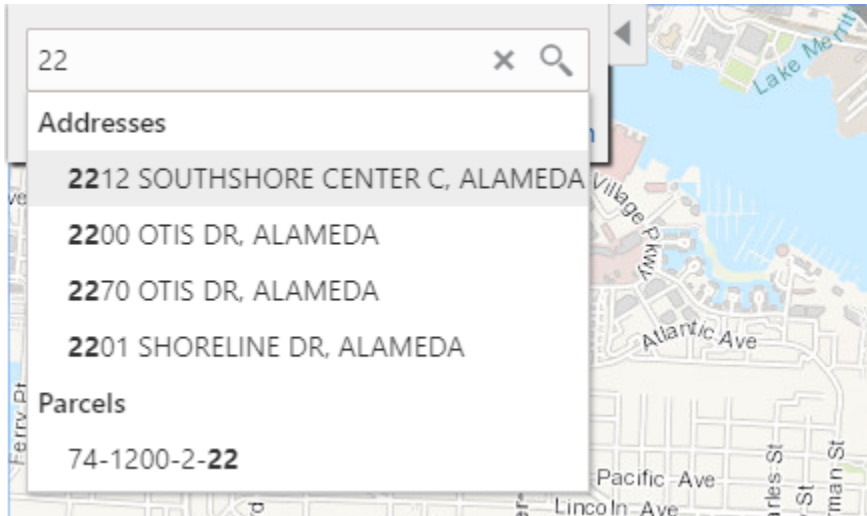
- Search for transactions and view transaction markers on the map.

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.

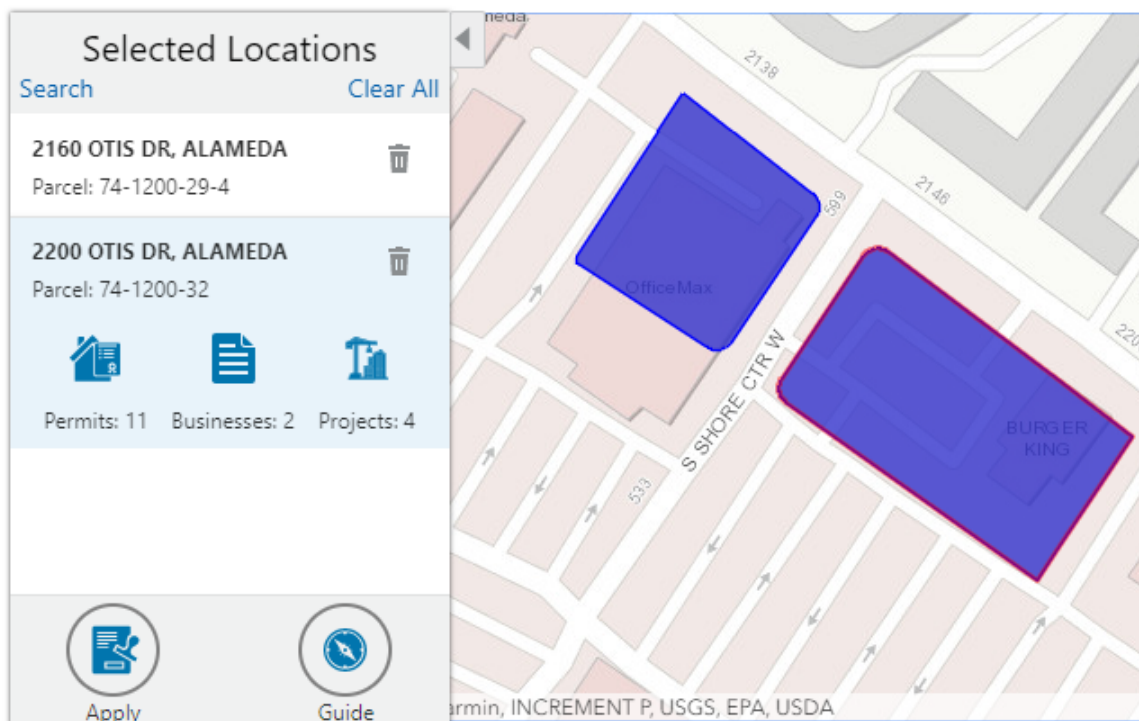
Note: To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience. 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.

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

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

4. 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.

5. Use these options to deselect properties:

Page Element	Description
Delete	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
Clear All	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:

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

The drawing toolbar appears.

2. Use these tools to make your property selection:

Selection Toolbar Button	Description
 Draw a Point	Click one or more points on the map to select the properties that contain the points.
 Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All properties that intersect the resulting polyline are selected.

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. Note: Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.
 Deselect All	Click this button to deselect all properties.
 Close	Click to close the toolbar.

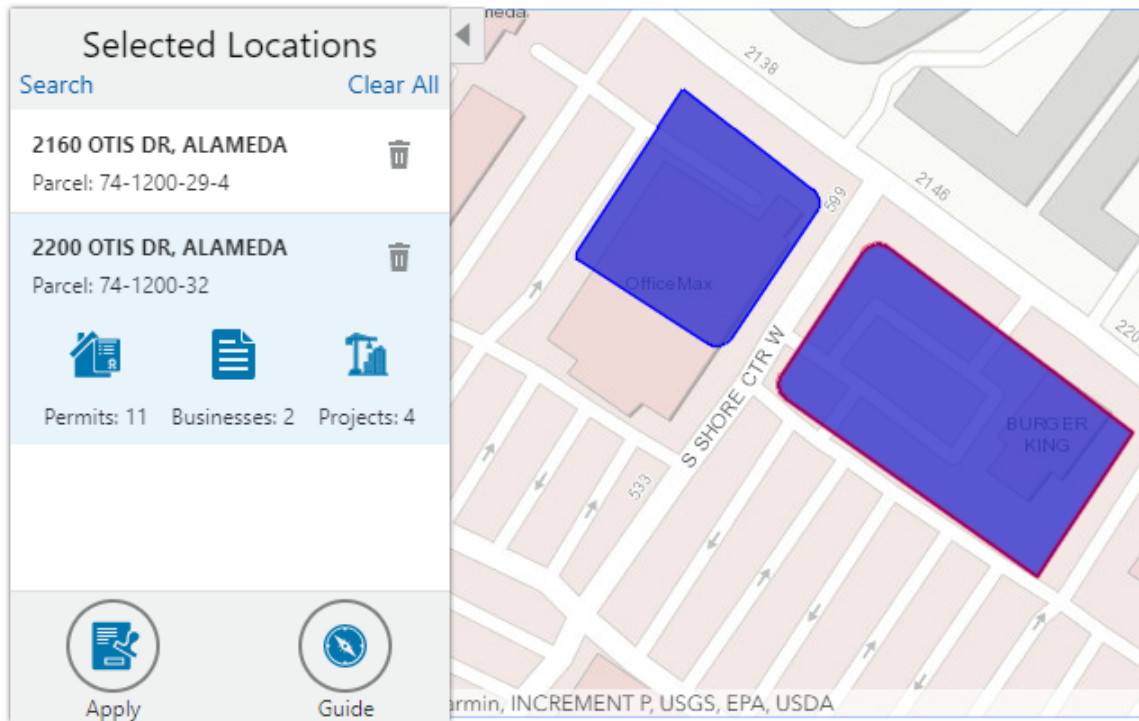
3. Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever properties are selected. 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), **Cases, Incidents** 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).

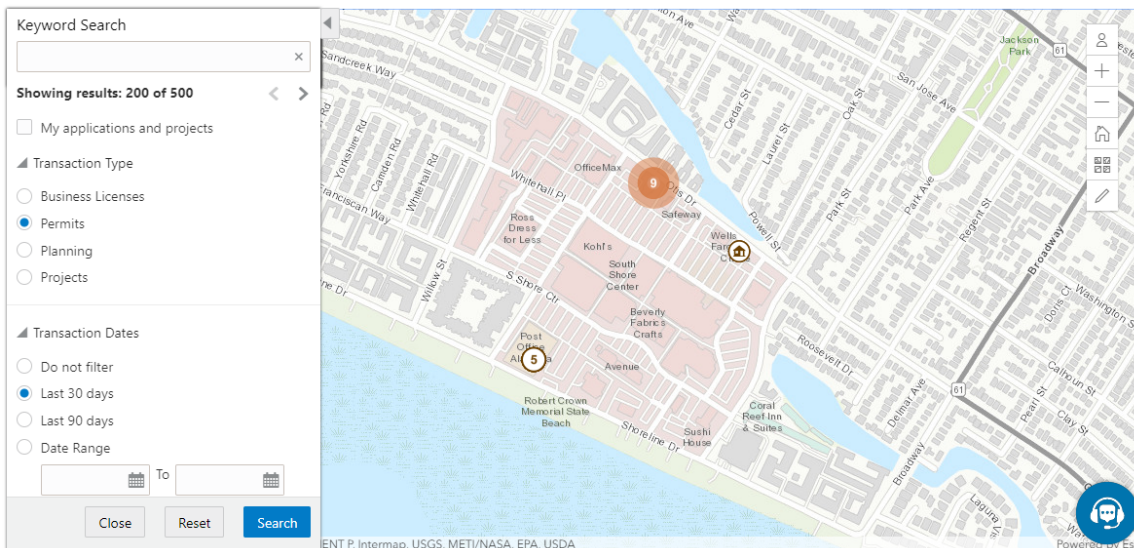
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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, cases, incidents 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), **Cases**, **Incidents** 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**.

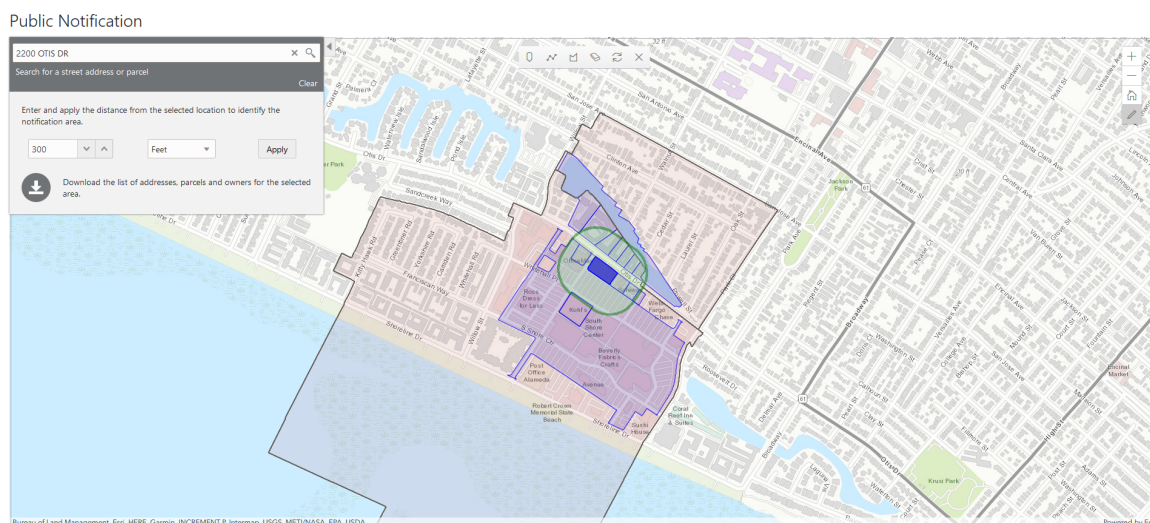
7. To close the advanced search and return to the simple location search, click **Close**.

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.

8 Using Accessibility Features

Overview of Accessibility

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

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

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

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

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

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

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

Keyboard Shortcut	Description
Tab	<p>This is the primary key used by all keyboard users to move from each control that can accept focus.</p> <ul style="list-style-type: none">• Use Tab to select any actionable or field just like you can use the mouse to select any field on the page.• For folder tabs, the Tab key will take you to a tab, and then you have to use other keys to select and navigate within that tab.• For radio buttons the Tab key will take you to the first radio button in a radio button set, and then you have to use other keys to select items within the radio button set.• For drop-down lists, the Tab key will take you to the list field, and then you have to use other keys to move through values and select values.
Shift+Tab	<p>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.</p>

Keyboard Shortcut	Description
Spacebar	Use for: <ul style="list-style-type: none"> • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
Enter	Use to: <ul style="list-style-type: none"> • Press a button. • Click a link. • Select an item from a drop-down list.
Down Arrow	Use for: <ul style="list-style-type: none"> • Moving through values in a drop-down list • Selecting different values in a set of radio buttons • Moving between different folder tabs
Up Arrow	Works the same as the Down Arrow, except it enables you to move in the opposite direction (previous instead of next).
Left Arrow	Works similar to the Up Arrow.
Right Arrow	Works similar to the Down Arrow.
Home	When in the context of tabs, sets focus to the first tab.
Ctrl+Home	Takes you to the very top of a page.

Using the Keyboard with Data Collections

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

Tables

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

Country

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

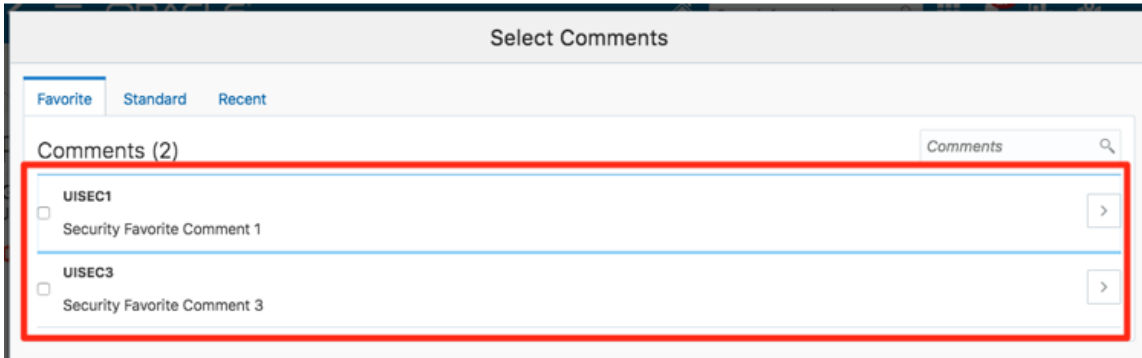
Page 1 of 22 (1-11 of 240 items) | 1 2 3 4 5 ... 22 >

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.



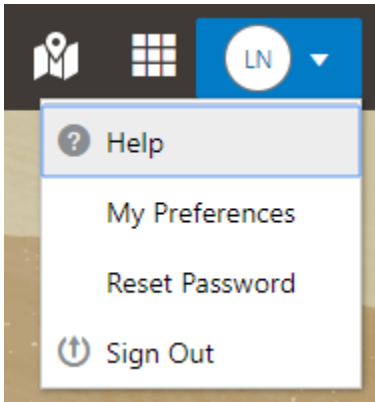
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the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

Workflow Space Name

Workflow Application ID

< July 2018 >

M	T	W	T	F	S	S
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

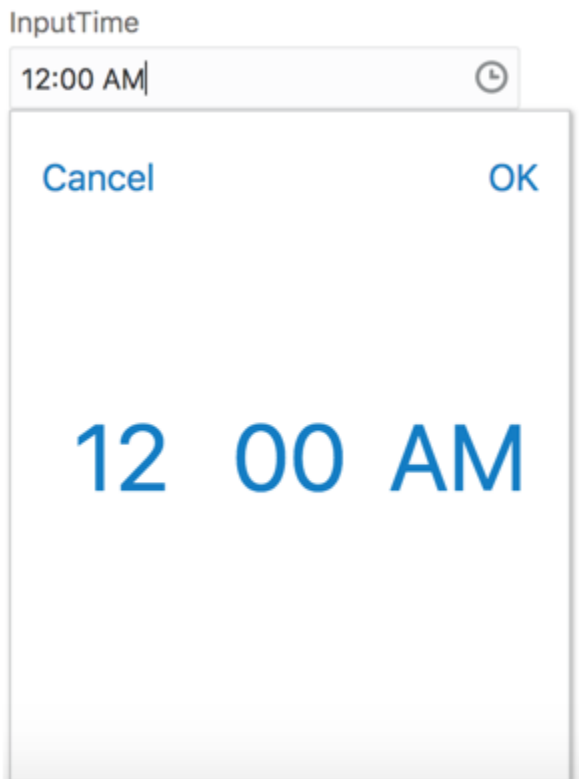
Today

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.

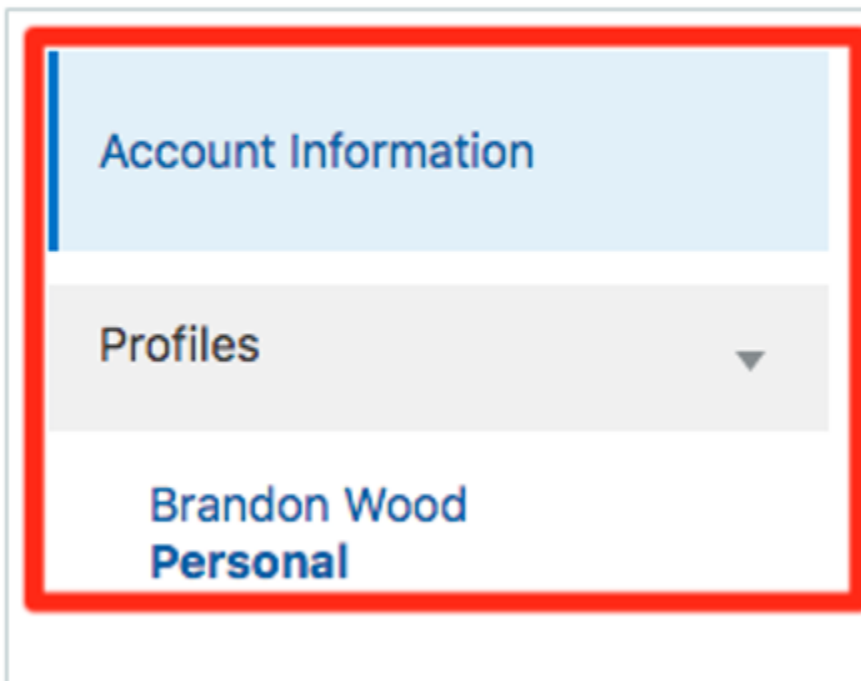
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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