

Oracle Public Sector Compliance and Regulation Cloud

**Using Community Development
Planning and Zoning**

21C



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Contents

Preface	i
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
Managing Account and Profile Conditions	26
Overview of Public Landing Pages	32
2 Completing a Planning Application	37
Choosing an Application Type	37
Getting an Online Fee Estimate	41
Completing an Application	42
Making Payments	45
3 Using the Agency Springboard and Worklists	49
Using the Agency Springboard	49
Using the Planner Worklist	52
Managing Tasks	55
4 Managing Applications for Planning and Zoning	59
Managing Transactions	59
Copying an Application	65
Canceling an Application	67
Navigating to Planning Application Details	68
Viewing the Planning Application Detail Overview	71
Withdrawing an Application	74

Working with Planners	75
Working with Property Information	76
Viewing Application Information	79
Using Workflow	80
Working with Reports	91
Working with Meetings	93
Working with Pre-application Outcome	98
Working with Conditions of Approval	100
Working with Contractors and Agents in Applications	104
Working with Public Hearings	106
Generating a Hearing Notifications List	112
Working with Appeals	113
Adding Contacts to Applications	115
Applying Conditions to Applications	117
Working with Attachments	121
Working with Comments	125
Working with Fees and Payments	126
Viewing Project Summaries	131
Working with Application Communications	132
Working with Ad Hoc Communications	137
Viewing Application Status History	142
Working with Related Transactions	142
5 Working with Planning Application Expiration	147
Expiration Overview	147
Working with Application Expiration	149
Updating Application Expiration Status	150
6 Recording and Billing Time	155
Adding Time Entries	155
Assessing Fees for Time Entries	157
7 Managing Manual Plan Reviews	161
Manual Plan Review Process Flow	161
Managing Manual Plan Review Cycles	161
Performing Manual Plan Reviews	165

8	Managing Electronic Plan Reviews	169
	Electronic Plan Review Process Flow	169
	Managing Electronic Plan Review Cycles	169
	Performing Electronic Plan Reviews	176
9	Managing Projects	179
	Using Projects	179
	Adding a New Project	180
	Viewing and Updating Project Details	182
10	Tracking Planning Application Activities	191
	Overview of Activity Tracking for Planning Applications	191
	Working with Planning Application Activities	192
11	Managing Property Information	195
	Viewing Transactions Associated with a Parcel	195
	Working with Property Attachments	197
	Applying Conditions to Parcels and Addresses	198
	Working with Parcel Genealogy Transactions	201
	Reconciling Provisional Parcels	204
12	Managing Contractor Information	209
	Contractor License Overview	209
	Managing Contractor Licenses	211
13	Working with Maps	219
	Overview of Delivered Maps	219
	Using the Map Toolbar	222
	Viewing Map Markers	223
	Using the Main Map and Explore Your City Map	226
	Creating Map-Based Public Notification Lists	232
14	Working with Payments	235
	Payment Flow Overview	235

Working with Cashier Sessions	236
Reconciling Cashier Sessions	238
Printing Deposit Slips	240
Viewing Payment History	241
Viewing Invoice History	243
Viewing and Processing Refunds	244
15 Working with Accounting	247
Viewing Accounting Transactions	247
Generating Journal Entries	247
Reviewing Journal Entries	250
Exporting Journal Entries	251
16 Working with Processes	255
Using the Process Monitor	255
17 Using the Digital Assistant	257
Overview of Digital Assistant	257
Asking Details	257
Asking Questions	257
18 Using Accessibility Features	259
Overview of Accessibility	259
Using General Keyboard Shortcuts	259
Using the Keyboard with Data Collections	260
Using the Keyboard to Work with Page Controls	264

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.

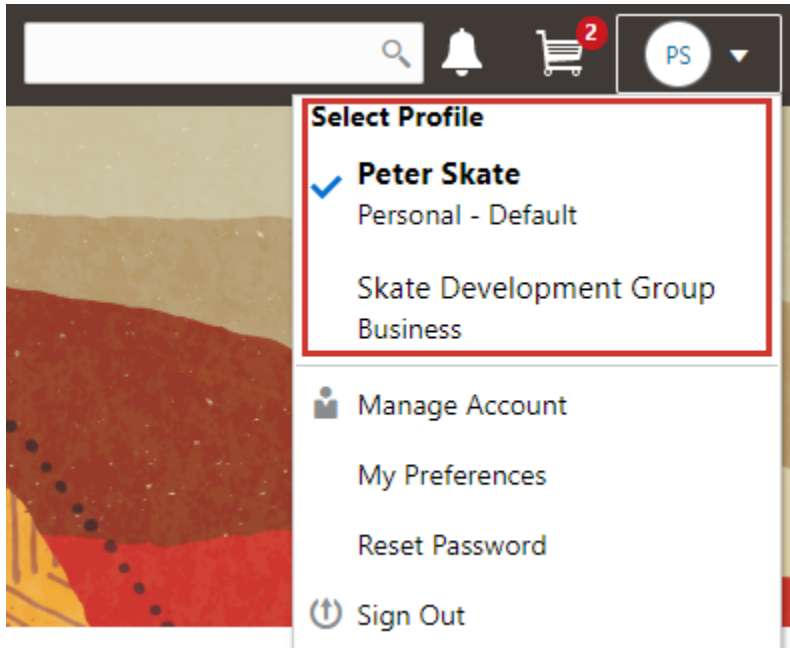
Updates to the address, phone, or email made during subsequent applications can be saved to the user's account profile.

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.

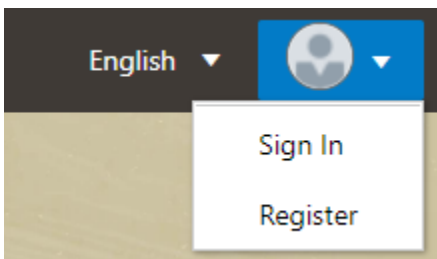
- **Conditions:** restrictions that prevent certain actions or issue warnings when the actions are attempted.

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.

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.

Register

Entering Registration Information

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

Page Element	Description
	Accounts can have both personal and business profiles. The registration process creates a single profile, and additional profiles must be added later. The Account Use setting determines whether the default profile that is created during registration is a personal or business profile. For more information about profiles, see Overview of Public User Accounts and Profiles.
Are You a Contractor?	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. 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. 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.
Add License	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. Clicking this button opens the Contractor License Details page, which includes these fields: License Type, License Number, Issued On, and Expiration Date. 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. Note: Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.
Mask My Contact Information from Public View	Gives the user the option to hide their name and contact information when a member of the public views the user's applications. This question appears only if it is enabled on the Public User Setup page. The default answer to this question is <i>No</i>. Users can access help for this question by clicking the question mark icon adjacent to the question. The help explains that even when the user's own information is masked, the property addresses for all applications are visible to the public.
Salutation	A title such as <i>Ms.</i> or <i>Mr.</i> that is used to address the person. This field is optional.
First Name and Last Name	The user's name, which is the same across all of the user's profiles.
Business Name	This field is visible only if the Account Use field indicates that this is a business account. The business name entered here is associated with the business profile that the registration process creates. If additional business profiles are added later, they have their own business names.
Email Address and Confirm Email Address	The user's email address. Enter the email address again to confirm.

Page Element	Description
	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. After the user submits registration information, the system sends an email to this address. The email contains a link that the user needs in order to complete the registration process. This email address is also associated with the default profile that the registration process creates.
Address Fields	The user's address. This address is automatically added to the default profile that is created when the user creates an account. The Country field displays <i>US</i>. 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. A user who doesn't know the postal code can click the Don't know link to display a full set of address fields.
IVR Access Code (Interactive Voice Response Access Code)	A 4-digit PIN that public users enter when accessing permit inspections using the agency's interactive voice response system. 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. This field appears only if your agency enables IVR access codes on the Public User Setup page. See Setting Up Public Users.
Phone	A phone number for the account holder. This field is optional.

Agreeing to Terms and Conditions

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

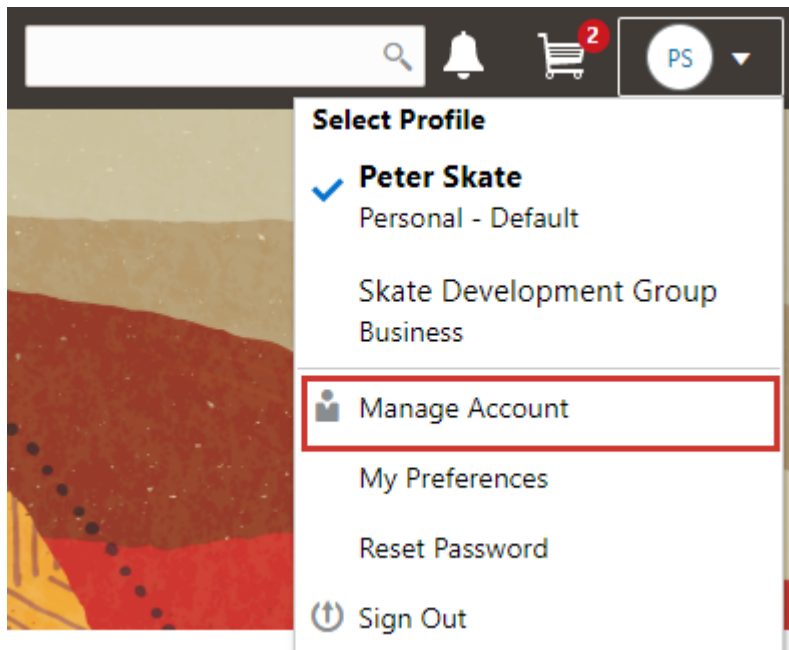
Account Management Navigation for Registered Public Users

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

Conditions

Account Information

Profiles

Joe Smith
Personal, Default

Profile-Joe Smith

Clone Profile

Create New Profile

Profile Basics

Set a default profile, or update profile name and status.

Personal, Default

Contact Information

Update phone number, email, and address.

Added 2

Contacts

Add contacts for quick access from applications.

Added: none

Licenses

Add your licenses for quick access from applications.

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	The email that was provided during registration. This field is read-only. 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. 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.
IVR Access Code (Interactive Voice Response Access Code)	This field appears only if the agency enables IVR access codes on the Public User Setup page. See Setting Up Public Users. 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. The code is masked on this page. To change the code, click the Edit icon. You can click the cancel icon to return to the original code, or you can enter a new code and click the check mark to save the new value.

- c. Click **Cancel** to close the page.
5. To view or update additional information:
 - a. Click the **Additional Information** item in the right frame.
The Additional Information page appears.
 - b. Review or update the setting for the **Mask My Contact Information from Public View** check box.
 - c. Click **Save** to save any changes and close the page.
6. To review the most recently accepted terms of use:
 - a. Click the **Terms of Use** item in the right frame.
A window with the full text of the terms of use appears.
When a public user views this information, the terms are always current as of the time the user signed into the current session. This is because users must agree to any changes in the terms of use when signing in.
When agency staff views this information, they see the terms that the user last accepted, even if the agency has changed the terms since then.
 - b. Click the **x** in the top right corner of the window to close it.
7. To view conditions that have been applied to the account:
 - a. Click the **Conditions** item in the right frame.
A window that lists account-level conditions appears. Active conditions are first, followed by resolved conditions.

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

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

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

Managing Account Attachments

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

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

To manage account attachments:

1. Access the Manage Account page.

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

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

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

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

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

Page Element	Description
File Name / Date	The file name of the attachment, and the date that the attachment was added to the account.
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Profile Name	If the attachment is associated with a specific profile, the profile name appears. If the attachment is associated with the account in general (and not with a specific profile), this column is blank.
Category	This column appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories. When visible, this field displays the document category for the attachment. For more information, see Setting Up Document Categories and Subcategories and Setting Up Document Groups.

Page Element	Description
Subcategory	This column appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a <i>Licenses</i> category might have subcategories for different types of contractor's licenses. When visible, this field displays the document subcategory for the attachment.
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 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	The identifying name for the profile. This name appears in the page header when this is the current profile and in the Select Profile menu for switching profiles. This name also appears in the profile list on the Manage Account page. The default name for the profile that is created during the registration process is the public user's first and last name. This default name is truncated if it is longer than 60 characters.
Default	Select this check box to designate the profile as the default profile for the account. The default profile is the one that's used when the public user signs into the system. The profile that gets created during the registration process is the default profile until you add additional profiles and change the default. Only one profile can be the default, so when you select this check box for one profile, the check box is automatically deselected for the previous default. The check box is read-only for the current default profile. This prevents you from deselecting it and creating a situation where there is no default profile.
Profile Type	Displays either <i>Personal</i> or <i>Business</i>. You cannot change the profile type.
Status	Profiles can be <i>Active</i> or <i>Inactive</i>. Only active profiles appear in the Select Profile menu for switching profiles. Inactive profiles are not editable. To make a profile active after you create it, edit the profile basics using account management functionality. See Managing Public User Accounts.

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

Updating Profile Information for a Business

To update profile information for a business:

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

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

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	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. The default value is <i>Pending verification</i>. Agency staff updates the status to either <i>Verified</i> or <i>Verification failed</i> after independently verifying the user's contractor status. Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.

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

Page Element	Description
License Type	This is a free text field for entering the type of license, such as a General Contractor license or an Electrical Contractor License.
License ID	Enter the license number that uniquely identifies the license.
Start Date	Enter the date that the license became valid.
Expire Date	Enter the date that the license expires or requires renewal.

Page Element	Description
Verification Status	This field is visible if the Public User Setup page is configured to require that licenses be verified. The default value for a new license is <i>Pending verification</i>. Agency staff updates the status to either <i>Verified</i> or <i>Verification failed</i> after independently verifying the license. Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.

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

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

Updating Trust Accounts

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

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

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

The Trust Account Details page opens.

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

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

Page Element	Description
Verification Status	This field is visible if the Public User Setup page is configured to require that accounts be verified. The default value for a new account is <i>Pending verification</i>. 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. Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.

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

Managing Profile-Specific Attachments

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

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

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

To manage profile-specific attachments:

1. Access the Manage Account page.

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

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

When a profile is selected, the right frame displays information for that profile. The row for attachments includes information stating how many attachments (if any) are associated with the selected profile.

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

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

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

Page Element	Description
Description	A user-supplied description. Users can optionally add a description while adding the attachment.
Category	This field appears only if the agency's public user setup specifies a document group for public user attachments. Document groups consist of a set of document categories. When visible, this field displays the document category for the attachment. For more information, see Setting Up Document Categories and Subcategories and Setting Up Document Groups.
Subcategory	This field appears only if the agency's public user setup specifies a document group for public user attachments. The categories in a document group can optionally include subcategories. For example, a <i>Licenses</i> category might have subcategories for different types of contractor's licenses. When visible, this field displays the document subcategory for the attachment.
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])



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

Cancel

Save

Managing Verification Requests

To find and manage pending verification requests:

1. Select **Public User > Public User Access**.
2. Locate accounts with a value in the **Pending Verification Requests** column.
This column displays the number of pending requests for the user. It's blank for users with no pending requests.
The surest way to locate accounts with pending verifications is to sort accounts based on the number of pending requests. To sort by a specific column, click the triangle icon in the column header. Click again to reverse the sort order.
3. Click a value in the **Pending Verification Requests** column to access the Pending Verification Requests page.
The page lists the pending verification requests for the selected user. Requests that have already been verified (or failed verification) do not appear.
4. Review the following information for the requests to be verified:

Page Element	Description
Profile Name	Displays the profile that is associated with the data to be verified.
Type (type of request)	Explains what type of information must be verified. Values include:

Page Element	Description
	○ <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.

Managing Account and Profile Conditions

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

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

A condition's rules control which activities are limited by the condition. These rules relate to objects such as addresses, parcels, persons, and transactions. For information about these rules, see [Setting Up Conditions](#).

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

Severity	Icon	Description
Lock		The user is prevented from completing any of the activities that are affected by person conditions.
Hold		The agency user who applies the condition chooses which activities to prevent. You'll see warning messages only for the selected rules.

Severity	Icon	Description
Notice		The user receives warning messages when attempting any of the activities that are affected by person conditions.

Viewing Conditions and Condition Indicators

This example shows condition indicators on the Manage Account page.

Manage Account

PersonCondition_Lock All Conditions: 4

Conditions

Account Information

Profiles

Dooley Doodles Business

Nora Dooley Personal, Defa...

Conditions

Account Profiles

Apply Condition

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

To view active conditions for a public user:

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

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

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

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

Conditions				
Condition Name	Severity	Account or Profile	Display Message	Applied Date
Payment Overdue	Lock	Dooley Doodles	You have an overdue payment	2/19/20
PersonCondition_Notice	Notice	Account	Notice Condition	2/17/20
Page 1 of 1 (1-2 of 2 items) < 1 >				

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

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

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

Adding Conditions

To add account and profile condition:

1. Access the Manage Account page.
 2. Click **Conditions** in the left frame.
 3. In the right frame, click either **Account** or **Profiles** depending on whether you want to add the condition to the overall account or to specific profiles.
 4. Click **Apply Condition**.
 5. If this condition applies to specific profiles:
 - a. Expand the **Select One or More Profiles** section.
 - b. Review the list of profiles, and select the **Apply Condition** check box for the profiles that will be subject to the condition.
- Note:** You can apply a condition to multiple profiles at once, but you will need to resolve the conditions for one profile at a time.
6. Enter the following condition information:

Page Element	Description
Condition Name	Select one of the conditions that the agency has defined. After you select a condition, the condition information is brought in as it was defined by your agency administrator. You can override the default rules, priority, description, and additional information to customize the condition.

Page Element	Description
Display Message	Displays an informational message that also appears in the list of all active conditions for an account.
Severity	Displays the severity of the selected condition: ○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition. ○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition. ○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Condition Rules	Displays check boxes for indicating which actions are locked down. If a check box is not selected, the action is permitted. The check boxes are selected and read-only if the severity is <i>Lock</i>. They are hidden if the severity is <i>Notice</i>. If the condition severity is <i>Hold</i>, the selected check boxes are brought over from the condition definition. You must select at least one check box. The Prevent Application Progress check box is always visible because all conditions affect new applications. Check boxes for these condition rules are visible only if the Apply Conditions to Transactions switch is enabled. ○ Prevent Application Progress ○ Prevent Workflow Advancement ○ Prevent Issue or Final ○ Prevent Payment ○ Prevent Inspection Schedule (applicable only to permits) ○ Prevent Inspection Result (applicable only to permits) ○ Prevent Final Inspection (applicable only to permits)
Priority	Select <i>High</i> , <i>Medium</i> , or <i>Low</i> .
Description	The default description comes from the condition definition, but you can change this description as needed.
Additional Information	Enter any additional information or notes regarding the condition that you're applying.

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

Page Element	Description
Apply Condition to Transactions	Applies the condition to new transactions that will be associated with the account or profile. You turn off the switch if you want the condition to be applied only to the transaction you're working with. When you enable this switch, the complete set of condition rule check boxes becomes visible in the Condition Rules section of the page. If the severity is <i>Hold</i>, you can accept the default selections or select which condition rules to apply. If this switch is not enabled, the only relevant condition rule (and the only visible condition rule check box) is Prevent Application Progress. The default setting for this switch comes from the condition definition, but you can change the setting.
Include in-process transactions	This check box is visible only if the Apply Condition to Transactions switch is enabled. Select this check box to apply the condition to all active applications for this account or profile.
View Impacted Transactions	Click this link to open a window that lists the in-process applications that will be impacted if you select the Include in-process transactions check box.

8. Click **Save**.

Resolving a Person Condition

To resolve a person condition:

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

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

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

3. Locate the condition to be resolved.

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

4. Click the **Resolve** button.
5. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created.

You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.

6. Use the **View Impacted Transactions** link to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
7. Click **Save** to apply the resolution and close the window.

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

Viewing or Updating Condition Details

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

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

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

3. Review summary information for conditions.

Active conditions are listed before resolved conditions.

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

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

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

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

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

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

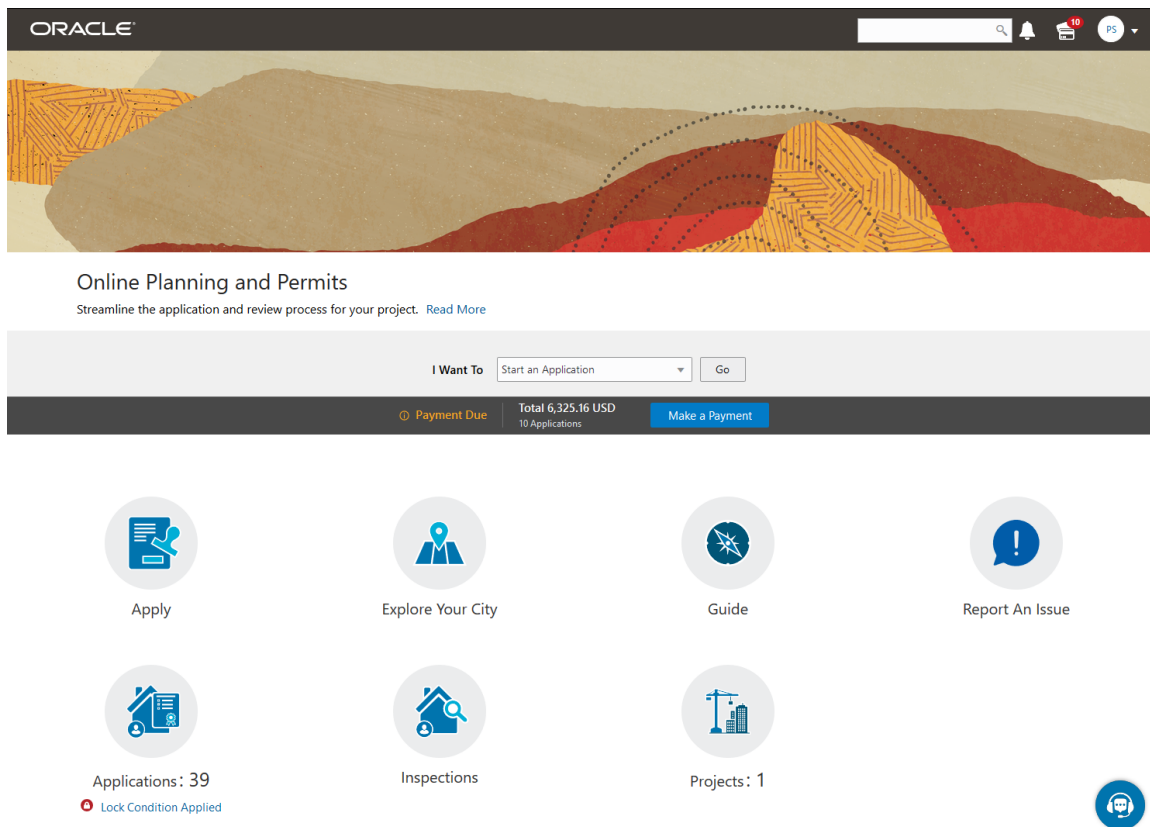
5. Click **Cancel** to return to the Conditions page.

Overview of Public Landing Pages

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

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

This example illustrates the landing page as it appears to a user who is signed in. This is known as the registered user landing page.



Landing Page Configuration

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

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

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

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

Tiles on the Anonymous User Landing Page

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

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

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

Tiles on the Registered User Landing Page

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

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

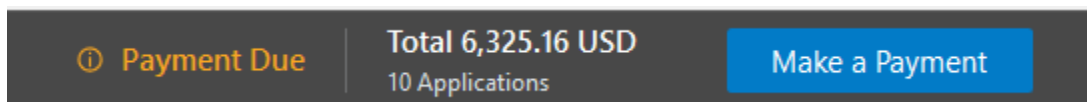
Menu Link	Description
Report an Issue	Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured. See Reporting Issues.
Applications	Displays a list of the user's own applications, including business license, permit, and planning applications. From the list, the user can access application details. The list has a regular list view, a grid view, and a map view. There is also a Show All Statuses switch for toggling between a list of active applications and all applications.

Menu Link	Description
	The number of active applications appears in the tile label. This number includes both permit applications and planning applications. If one or more conditions have been applied to the user's applications, a conditions icon appears below the tile. The icon associated with the most severe condition is displayed. For example, if there is a permit application with a lock condition (which prevents further activity on the permit) and another application with a notice or informational condition, only the lock icon appears below the tile.
Inspections	Displays a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections. The number of scheduled and requested inspections appears in the tile label.
Projects	Displays a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact. This tile is hidden from users who do not have any projects. The number of active and completed projects appears in the tile label.
Businesses	Displays a list of the businesses associated with the user's business licenses. This tile is visible only if the user has at least one active business. The number of active businesses appears in the tile label. Users can review summary information about a business and click an individual business for additional details. The list displays the business ID, legal name, mailing address, and location.
Business Licenses	Displays a list of the user's own business licenses. The tile is visible only if the user has at least one active business license. The number of active business licenses appears in the tile label. The list displays summary information about licenses, including the license ID, license type, license status and expiration, the license period, the business name and physical address, a description, and fee information. The user can also initiate an amendment or renewal from the list. The Show All Statuses switch toggles between a list of active licenses and all licenses. Users can click individual licenses for additional details or to take any actions such as viewing the certificate.

The Make a Payment Banner

The Make a Payment banner provides fees information at a glance and a button to go directly to the payment page.

This example illustrates the Make a Payment banner.



Applicants see the total amount due, number of applications with fees due, and a button to navigate to the Make a Payment page, where they can review and select application fees for payment. For more information, see [Making Payments](#).

The Digital Assistant Button

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

This image shows the digital assistant button.



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

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

2 Completing a Planning Application

Choosing an Application Type

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

Working With the Apply Page

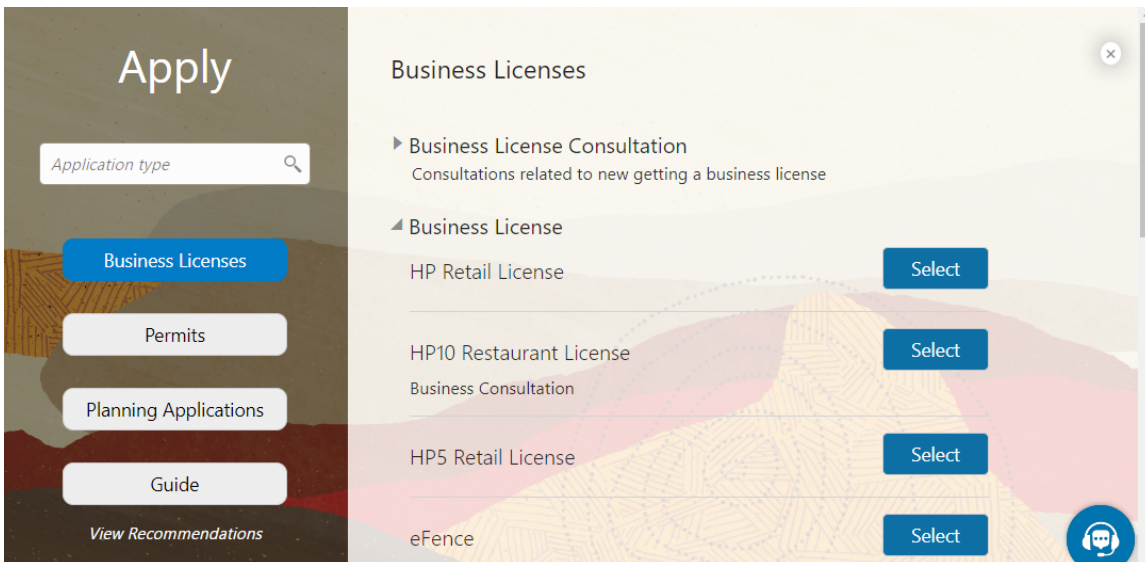
The Apply page offers these options for finding application types:

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

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



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



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

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

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

Accessing the Apply Page

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

Registered users and agency staff have these additional options

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

Searching for Application Types By Name

To search for an application type by name:

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

Searching for Popular and Recent Application Types

To search for popular and recent application types:

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

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

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

Browsing for Application Types

To browse for application types:

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

Using a Guided Questionnaire to get Application Type Recommendations

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

To find application types using a guided questionnaire:

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

Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

1. Sign in.

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

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

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

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

Getting an Online Fee Estimate

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

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

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

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

Here's how to get an estimate:

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

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

Completing an Application

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

Applications for business license renewals and amendments also follow this process. For more information, see *Applying for a Business License Renewal* and *Applying for a Business License Amendment*.

This example illustrates an application.

✕ Close Application

Step 1 of 5: Applicant

Save Previous Next

New Swimming Pool

Applicant

First NamePeter

Middle Name

Last NameSkate

CountryUS

* Zip Code94080

City of Los Angeles, US-CA

* Address Line 1466

Address Line 2William Street

Phone1(541) 754-3010Ext. 3256

Email

SalutationMR.

Suffix

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

Data Entry Pages

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

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

Section	Notes
Applicant	- All applications include this section, which is used to identify the applicant. - When a registered public user starts an application, this section is prepopulated, and certain identifying fields are read-only. Updates made to the address, phone, or email when applying can be saved to the user's account profile. - Agency staff members who complete an application on behalf of a member of the public must identify the applicant by selecting an active profile for an existing registered user or by registering a new user.

Section	Notes
	When registering a new user, the staff member can continue with the application after entering and submitting the required registration information. A confirmation email is sent to the account email address so the user can complete the registration process by clicking the provided link and setting an account password. The registration is valid even if the agent abandons the application. Staff members can't accept the terms of use on behalf of users that they register. Instead, users are prompted to accept the terms when they first sign in. Registered users and agency staff with appropriate permissions can update the applicant's address, phone, or email in subsequent applications and optionally save the changes to the user's account profile. System administrators can also update account information. See <i>The Public User Registration Process</i>
Application	The Application section includes the record ID and a field where applicants can enter a description. Agency staff also provide the date the application was received while entering data into the system. The received date field isn't available for applicants applying online.
Terms and Conditions	• If a data entry step includes the Terms and Conditions section, public users must agree to the terms before continuing past that step. • Agency staff can't accept terms on behalf of a public user, so this section is hidden from agency staff.
Contacts	All applications: • The Contacts section lists people who are contacts for this specific application. These people can be, but aren't required to be, the applicant's profile contacts. • Select an existing contact from a list, or enter information for a new contact on the Contact Details page. • All application contacts must have a contact type that describes the role of the person relative to the specific application. Permits and planning applications: • On the Contact Details page for new contacts, use the Add to Profile switch to replicate the new contact to the applicant's list of profile contacts. • On the Contact Details page for already-added contacts, use the Update Profile switch to replicate any changes (such as an updated email or phone number) to the profile contact. This switch appears only if the contact is already a profile contact. Permit applications: • If the contact type is configured to allow permit access, and the contact email matches the account email for a registered user, then that registered user can access the permit. • When prompting for a contact type, the user can see which types allow permit access. • The list of contacts for the application includes columns that display the contact type and whether permit access is enabled for that type. • The page where you enter or edit contact details includes explanatory text to ensure that users are aware when the selected contact type confers permit access. • For more details about a contact's access to a permit, see <i>Setting Up Contact Types</i>.
Contractor	Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are required to enter a license number. The license number can be used to retrieve additional information about the license and the business from the agency's main contractor records if the

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

Review Page

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

Confirmation Page

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

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

Single Page View and Multi-Page View

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

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

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

General Navigation Controls

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

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

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

Making Payments

Applicants can pay fees online using a central payment page and checkout process. The Make a Payment page is used to list applications with fees where the applicant can review and select them before making a payment.

The Make a Payment page for applicants shows fees associated with applications belonging to one customer profile—such as personal or business—at a time. When a user switches profiles, the page is updated to show fees for the selected profile.

Applicants access the Make a Payment page from the registered user landing page and their Applications page. Applicants can also make payments from an application's Fees and Payments page.

Agency staff can process payments for individual applications only, from the Fees and Payments page for a specific application and the agency's Transactions list page. When agency staff submits applications on behalf of registered users, they can see the applications on their Applications page and Make a Payment page.

For information about fees payment from the registered public user's Applications page or from the agency staff's Transactions page, see [Managing Transactions](#).

For information about fees payment from the application's Fees and Payments page, see [Working with Fees and Payments](#).

Viewing Fees from the Registered User Landing Page

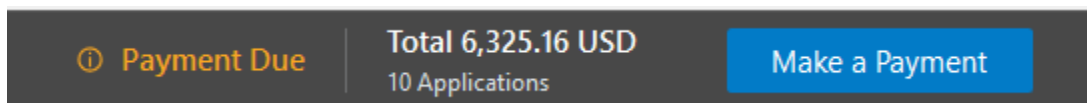
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

This example illustrates the Make a Payment icon showing 10 applications with fees for payment.



The number of applications as well as the amount due for the applications appears on the Make a Payment banner:

This example illustrates the Make a Payment banner.



Clicking the icon or the **Make a Payment** button opens the Make a Payment page, which lists the applications with fees that are awaiting payment or payment is in process.

Paying Fees on the Make a Payment Page

The system initially applies fees to the user's account when an application is submitted. Later fees may be adjusted or added. When fees for an application are due, the applicant can review and select the applications for payment on the Make a Payment page. Fees not selected for payment remain on the page.

Fee adjustments are automatically reflected on the page before checkout processing.

This example illustrates the Make a Payment page.

City of
INNOVATION

15

BW

Make a Payment

Total Selected | 3 Applications | 743.65 USD

Make a Payment

Search

☐ Select All	Application	Property	Description	Amount
☐	RESADD-2021-00039 Residential Addition	1230 WALNUT ST, ALAMEDA, California, US	Addition over the garage	655.00 USD Processing payment
☐	RESADD-2021-00052 Residential Addition	3267 Central Avenue, 3267, ALAMEDA, California, US	888 sq ft addition. Adding 2 bedrooms and 2 bathrooms to the upper level	150.00 USD
☐	RESADD-2021-00074 Residential Addition	1100 Walnut Street, ALAMEDA, California, US	Residential Addition Demo	560.05 USD Processing payment
☐	RESADD-2021-00071 Residential Addition	1100 WALNUT ST, ALAMEDA, California, US	Renovation of patio	100.00 USD Processing payment
☒	RESADD-2021-00070 Residential Addition	1100 Walnut Street, ALAMEDA, California, US	Upper floor modification	123.00 USD
☒	RESADD-2021-00076 Residential Addition	1100 WALNUT ST, 3267, ALAMEDA, California, US, 94501		570.60 USD
☒	PLMB-2021-00010 Plumbing	3267 CENTRAL Ave, 3267, ALAMEDA, California, US, 94501		50.05 USD

Here's how to use the Make a Payment page:

Page Element	Description
Select All/Deselect All	Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied. The Total Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.
Application	Each item on the page is identified by the application number. Click the application number to open the overview page with the application summary and access to details. The type of application, such as <i>Residential Addition</i>, appears under the application number. If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see Applying Conditions to Applications.
Property	View the location of the property for the application.
Description	View a description of the application.
Amount	View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.
	The Balance Changed alert indicates the fees for the application have been adjusted. Adjusted fees are updated automatically before checkout processing.
Make a Payment	Click to continue to the checkout page after selecting fees for payment.

Page Element	Description
	For information about the checkout process, see Payment Flow Overview .

Users can't make any changes to the application and associated fees submitted for payment during processing. After the payment processing is complete, the applications are removed from the list, and the system directs the user back to the Make a Payment page to pay remaining fees. If there are no more fees left after a successful payment, the user is directed to their Applications page. If the payment fails, the applications remain on the Make a Payment page and can be updated or resubmitted for payment.

For information about incomplete payments, see [Working with Fees and Payments](#).

3 Using the Agency Springboard and Worklists

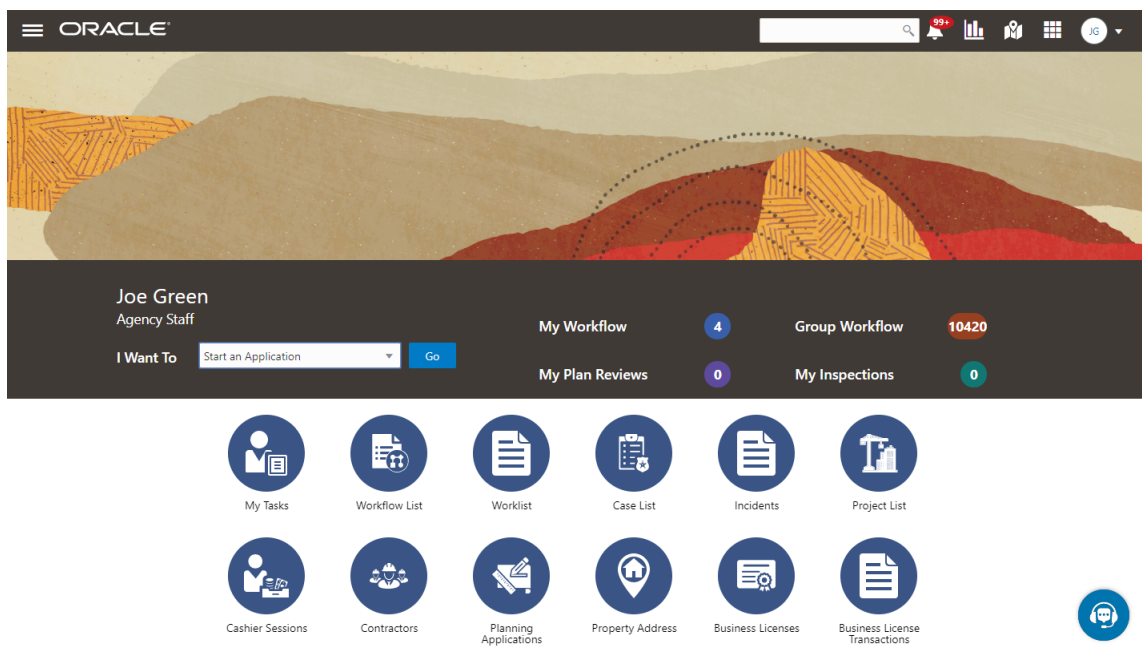
Using the Agency Springboard

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 Header

The global header appears:

- At the top of pages throughout the system.
- Differently for public users and agency users.

For public users, it does not include all of the elements that are available to agency staff. The header for agency staff includes these elements:

Page Element	Description
	Click the Back icon to return to the previous page. The header doesn't include this icon when you're on the springboard.
	Click the Navigator icon to access pages using a hierarchical menu.
	Click the Home icon to return to the Agency Springboard. The header doesn't include this icon when you're already on the springboard.
Global Search (unlabeled search box)	Enter search terms, then press enter or click the search icon to search for any of these objects: • 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. 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. Tabs for features that you haven't implemented are hidden. For example, if you don't use project functionality, the Projects tab is hidden. Note: Public users also have access to the global search, but their search results do not include code enforcement objects (citations, incidents and cases).
	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. A badge on the icon indicates the number of unread notifications. If there are more than 99 unread notifications, the badge displays 99+.
	Click the Reports and Analytics icon to access the Oracle Business Intelligence Catalog (BI Catalog) or access predefined dashboards.
	Click the Maps icon to access these maps: • 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. 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.

Page Element	Description
	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. The page finder provides a convenient alternative to the hierarchical menu navigation found in the Navigator.
	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.

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 choose an application type and start an application. See Choosing an Application Type .
<i>Estimate Fees</i>	Opens the Apply page, where you can choose 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 begin 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.

Using the Planner Worklist

The planner worklist provides a central location for performing planning-related activities. Separate tabs list unassigned applications, applications that are assigned to the current user, and activities that are assigned to the current user.

Access the worklist by clicking the **Planner Worklist** tile on the agency springboard.

Initially, all tabs to which you have access appear. Click a tab to see the applications or activities that meet the tab filter criteria and to access the relevant actions. When you click a tab other than the one that is initially selected, only the newly selected tab (and its subtabs, if any) are visible. Similarly, when you select a subtab, only that subtab is visible. Click the Back icon next to the Search icon to return to the previous view.

Each tab provides access to relevant actions. Performing actions from the worklist is equivalent to performing the same tasks from the Activity Tracking page in the application details.

The planner worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Unassigned Applications	Submitted and In Process planning applications that do not have an assigned planner. This tab includes a map view for displaying application locations.	Assign	This tab is visible only to users who have assigning privileges. Assigning an application removes it from this tab.
My Applications	Submitted and In Process planning applications that are assigned to the current user.	• Send Message See <i>Working with Application Communications</i> .	This tab is visible only to users who have the <i>Planner</i> Job Function (ORA_PLANNER) and the attribute

Tab	Displays	Available Actions	Additional Information
	Comments and attachments pertaining to this application. This tab includes a map view for displaying application locations.	- Reassign See <i>Working with Planners</i>. - Copy Application See <i>Copying an Application</i>. - Withdraw See <i>Withdrawing an Application</i>. - Update Description	<i>Planning Application Types</i> (ORA_PLANNING_APPLICATION_TYPES). Review or add your own comments and attachments. See <i>Working with Attachments</i> and <i>Working with Comments</i>. Reassigning an application to a different user removes it from this tab. Users with access to this tab can reassign applications even if they don't have the additional security that provides access to the Unassigned Applications tab.
Planning Activities	Open activities that are associated with the current user's assigned planning applications. Activities are open if they are pending or in progress. Also, incomplete application review activities are open if they haven't been resubmitted.	Update See <i>Working with Planning Application Activities</i>.	Completing an activity removes it from this list, but does not affect the application status. Activities are initially sorted by due date, with the soonest due date at the top of the list. This tab has subtabs that further filter the activities by due date: <i>Overdue</i>, <i>Due Today</i>, <i>Due This Week</i>, and <i>Due Next Week</i>. Subtab action menus have the same actions as the main tab. To return from a subtab to the main tab, click the Back icon next to the Search icon.
Plan Reviews	All applications owned by the current user that have tasks pending for review. The Plan Reviews tab displays a set of essential details related to the plan review, including the: - application ID and type - application status - application description - property information - plan review details - assigned date and due date - icons to the left to indicate if any fees are due or conditions have been applied.	No actions.	This tab is visible only if the user has the following: - Role: ORA_PSC_PLAN_REVIEWER_JOB - Access to the list: PSC_ACCESS_MY_PLAN_REVIEWS_TASK_LIST_PRIV

Tab	Displays	Available Actions	Additional Information
Inspections	All applications owned by the current user that have tasks in the Inspection status.	No actions.	This tab is visible only if the user has the following: • Role: ORA_PSC_BUILDING_INSPECTOR_JOB • Access to the list: PSC_ACCESS_MY_INSPECTIONS_TASK_LIST_PRIV
Incoming Tasks	All active applications assigned for the group.	If the incoming task is for the group then the planner has the following actions: • Claim • Reassign If the task is already assigned to the planner, then the planner has the following actions: • Update • Release • Reassign If you update the task by assigning or reassigning to a planner, the workflow task – Assign Planner will be updated to <i>Planner Assigned</i> status using the Business Rules Framework configuration. For more details, see Using Workflow.	
Calendar	Shows the meeting schedules for the agency on a calendar or on a list. Planner meetings show the schedules for pre-application, planning application, and public hearing.	• View meetings assigned to the planner logged in. • View all meeting schedules.	Calendar View shows the meetings scheduled for the month. You can choose to view the calendar by month, week, or day. List view shows the list of pre-application and planning application meetings in the Meetings tab and the list of public hearing meetings in the Hearings tab. See the section <i>Viewing Meetings on the Calendar</i> in Working with Meetings.

Related Topics

- [Overview of Activity Tracking for Planning Applications](#)

Managing Tasks

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

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

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

Reviewing and Managing Tasks

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

Task Tab	Description	Available Actions
My Plan Reviews	Lists plan reviews that are assigned to you in ascending order by due date.	None
My Workflow	Lists tasks that are assigned to you.	Release Reassign
Group Workflow	Lists workflow tasks that are assigned to a group to which you belong. Non-workflow tasks (plan review tasks and inspection tasks) do not appear here. Tasks on the Group Tasks tab are not assigned to individual group members. So this list functions as a group work queue from which individuals can claim specific workflow tasks. When a task is claimed, it is assigned to the individual and no longer appear in the list of group tasks.	Claim Reassign
All Workflow	Lists all tasks assigned to groups to which you belong, including tasks that are assigned to you and to other group members.	Claim Reassign

Task Tab	Description	Available Actions

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

Page Element	Description
Task Type	Identifies the nature of the task to be performed. Values include: ○ <i>Inspection</i> ○ <i>Plan Review</i> ○ <i>Workflow</i> The <i>Workflow</i> task type represents overall transaction workflow.
Transaction	Displays the transaction type number. For example, in the case of a permit, it displays the permit number and permit type for the associated permit.
Tasks	Displays a task name and identifier that depend on the task type: ○ For workflow tasks, the workflow process name and task ID appear. The task ID is for the specific instance of the task. ○ For inspection tasks, the inspection name and ID appear. ○ For plan review tasks, the plan review name and cycle count appear.
Status	Displays the task status. Different types of tasks can have different statuses. For example, inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks.
Assignment	Displays the date that the task assignment was last updated and to whom the task is assigned.
>	Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.
Additional items	If any fees are due or conditions are applied, icons indicating this appear in the left column of the grid.

5. To update the task assignment, select one of these options from the task's **Actions** menu:
 - **Claim** assigns the task to yourself. This action is available only for tasks that are currently assigned to a group. Once a task is claimed, it appears under the tab you find your tasks, such as My Workflow.

- **Release** removes the assignment without assigning a new owner. The task will now appear on the Group Task list until it is claimed or reassigned.
- **Reassign** opens the Reassign Task page, where you can select a new assignee.

Reassigning a Workflow Task

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

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

To reassign a workflow task:

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

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

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

The Reassign Task page appears.

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

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

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

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

4 Managing Applications for Planning and Zoning

Managing Transactions

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

As agency staff, such as a permit technician or planning and zoning administrator, you can use the Transactions page to view a complete list of permit and planning applications submitted to your agency. Registered public users with application access view their list on the Applications page.

Note: This topic focuses on permits, cases, incidents and planning applications. The Transactions page can also display business license transactions. For information about viewing business license transactions, see [Managing Business License Transactions](#).

The Transactions page provides a summary of permits and planning applications to agency staff only. Here are some of the things agency staff can do on the Transactions page:

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

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

Registered User View

The Applications page contains basic application information for the logged in registered public user. The user's selected profile controls which application data the user sees. To view applications for a different profile, the user must switch the profile.

Registered users who have applied for a permit or submitted a planning application for themselves or as a representative for someone else, see only the applications that they are associated with on the Applications page.

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

Using the Applications Page

Applicants can apply for a new permit or planning application and also view the details of their submitted applications on their Applications list page.

The payments banner at the top of the page displays information if there is a payment due for the submitted permit or planning applications. Applicants can use the **Make a Payment** button to pay for all or selected applications. For more information, see [Making Payments](#).

Applicants can make a payment for individual applications by using the **Pay** button, which is displayed on the application record row when there is a payment due. The **Pay** button is also available in the application details on the Fees and Payments page. For more information, see [Working with Fees and Payments](#).

Elements on the Applications page are part of the several options available on the Transactions page, which is detailed in the next section.

Using the Transactions Page

1. Select the **Permits Parcel** or **Planning Applications** tile on the agency springboard.
2. Click the link for the specific type of application you want to view:
 - **Business Licenses:** View a list of business license transactions.
 - **Permits:** View a list of permit applications.
 - **Planning Applications:** View a list of planning applications.
 - **All:** View a list showing all transaction types.
3. You can use these actions to display permits or planning applications:

Page Element	Description
Download	Click the download button to export the list to a .csv file.
Show All Statuses	Use this switch to filter the list based on transaction status: ◦ If the switch is off, the list includes only active transactions. This is the default setting if any active transactions exist. ◦ If the switch is on, the list includes transactions in all statuses, including active, inactive, canceled and withdrawn applications. This is the default setting if there aren't any active transactions.
Search	Search by alphanumeric characters on the fields for permits or planning applications in the list. The permits or planning applications that meet the search criteria are displayed on the page. When you search on dates, use this format: MM/DD/YYYY. Search results display only the primary address for the permit or planning application. You can confirm the correct transaction by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.
Filter By	Apply filters to display permits or planning applications that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.

Page Element	Description
	As a planner, you can also find the planning applications assigned to you or unassigned applications by selecting predefined filters, <i>My Assigned Applications</i> or <i>Unassigned Applications</i> , respectively.
Sort By	Here are some of the sorting options: ○ <i>Application</i> ○ <i>Type</i> ○ <i>Status</i> ○ <i>Creation Date</i> ○ <i>Created By</i> ○ <i>Total Fees</i> ○ <i>Total Due</i> ○ <i>Expiration Date</i>
List View	View the inventory of permits or planning applications in a list.
Grid View	View the inventory of permits or planning applications on a grid.
Map View	View the inventory of permits or planning applications on an interactive map. The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map. The search and filter options in the map view are the same options that you have in the list and grid views. See <i>Viewing Map Markers</i>.

Managing Application Activity

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

Here are some of the information you can look at:

Page Element	Description
Application	View the application ID, application type, and status. Review the application status, for example, <i>Payment Pending</i>, <i>Submitted</i>, <i>Pending</i>, <i>Permit Issued</i>, and so on.
Property	View parcel information. Review the parcel information, including the street address, if available. The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.
Description	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.
Additional Information	Review the user name of the person who filled out the application and the date the application was created. For example, the application was <i>Created by John Doe on 12/20/2018</i>. Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, <i>Applicant: John Doe</i>. View expiration notifications. For example, <i>Expires in 1 day</i> or <i>Expired on 10/01/2019</i>.
Planner	View the planner assigned to a planning application. This field appears only on the Planning Applications list.
Fees	Review the total fees that may be applicable to the permit or planning application and a fee balance if the total has not been paid.
	Select the Pay button in the Actions column to submit a payment on behalf of the applicant. The Pay button takes agency staff to the Pay Fees page where you can initiate a full or partial payment for the application fees. The Pay button on the Applications page takes applicants directly to the Checkout page. Only agency staff can initiate partial payments. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full. For more information about paying fees, see the Payment Flow Overview.

Page Element	Description
	Select the Resubmit button to resubmit an application. The application status is <i>Pending Submit</i> because there may be a problem initiating workflow. Click the Resubmit button to retry initiating workflow. Resubmitting the application does not affect the fee calculations.
	Select the Actions button for options: ○ <i>Copy Application</i>: Click to copy the details of the selected application to a new application. ○ <i>Cancel Application</i>: Click to cancel an application with a pending or payment pending status. The button appears only when the application has a pending status.

Identifying Transactions Page Icons

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

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

Starting an Application

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

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

Click **Apply** on the Transactions page.

For more information, see *Choosing an Application Type*.

For more information about filling out an application, see *Completing an Application*.

Updating an Application

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

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

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

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

For more information, see *Working with Permit Details*.

Canceling a Pending Application

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

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

Entering Application Fee Payments

Applicants can pay their fees online by clicking the **Make a Payment** button on the registered user landing page or on their Applications page, which takes them to the Make a Payment page. They then select applications to pay and proceed to checkout. Applicants can also pay for an individual application from the Applications page or the application's Fees and Payments page.

Instead of going through the Make a Payment page, agency staff initiate a payment on behalf of the applicant using the **Pay** button for the application on the Transactions page as shown here:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the **Pay** button for the selected application with an outstanding fee balance.
3. The **Pay** button takes you to the Pay Fees page where you can initiate a full or partial payment and proceed to checkout in payment services.

For information about paying fees for an individual application from the application's Fees and Payments page, see [Working with Fees and Payments](#).

Copying an Application

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

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

Accessing Application Details

You can access application details from the Transactions page.

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

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

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

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

Copying an Application

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

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

To copy an application:

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

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

Page Element	Description
Application Type (enterable)	Select the application type for the new application. The application type from the source application is the default value.

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

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

Page Element	Description
Description	Review and optionally modify the description of the source application to create the description for the new application.
Property	Select this check box to copy the property information from the source application. If the new application type doesn't include the Property predefined field group, property information is not visible in the intake form, but it's still copied to the new transaction.
Contacts	Select this check box to copy contacts from the source application. If the new application type doesn't include the Contacts predefined field group, contact information is not visible in the intake form, but it's still copied to the new transaction.
Application Details	Select this check box to copy application data from predefined field groups other than the ones that are controlled by separate check boxes (that is, field groups other than property, contacts, contractor, and authorized agents) . If the new application type is different from the source application type, copying only occurs for sections that exist in both the application types.
Contractor	Select this check box to copy contractor and authorized agent information from the source application. Copying adds the contractor license number to the new application. If the license number exists in the main contractor records, then the rest of the contractor data is pulled from the main records into the new application. If the license number doesn't exist in the main contractor records, then all data is copied from the source application.

Page Element	Description
	The authorized agent data indicates if the applicant is an authorized agent for the contractor. The logic for copying this data depends on how the applicant information is handled: ○ If a public user copies an application, and the user's account profile indicates that the profile is for a contractor, the authorized agent data is copied. ○ If agency staff copies from a planning pre-application to a regular application, the applicant information and authorized agent data is copied. ○ If agency staff copies from a regular application to another regular application, the applicant information is not copied, and therefore the authorized agent data isn't copied. If the new application type doesn't include the contractor and authorized agent predefined field groups, the data is not visible in the intake form, but it's still copied to the new transaction.

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

Canceling an Application

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

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

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

For information about withdrawing an application that was submitted and is already in progress, see [Withdrawing an Application](#).

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

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

Canceling Pending Applications

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

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

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

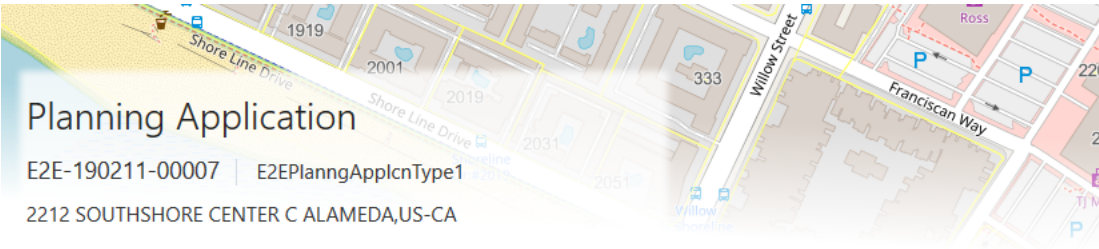
Note: When you cancel an application, the system also cancels any plan reviews that are associated with the application.

Navigating to Planning Application Details

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

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

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



<<

Overview

Property Information

Workflow

Planning Application Information

Application Details

Hearing

Contacts

Conditions

Attachments

Comments

Fees and Payments

Projects

Communications

Additional Information

E2EPlanngApplcnType1 Permit

Site and Zoning

Planning Case Required

Required Planning Case Type

Total Acreage

Disturbed Acreage

Base Flood Elevation

In Flood Zone

Flood Zone

- To access the planning application detail pages:
- 1. Select **Planning Applications** on the Agency Springboard.
 - 2. Click the row for a planning application.
 - 3. Navigate to planning application information using the links in the left panel.
- The information for a planning application comprises these pages:

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

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

Page Name	Description
	See Working with Fees and Payments .
Projects	View the summary of projects associated with a planning application. The planning application can be assigned to multiple projects. See Viewing Project Summaries .
Communications	View a list of communications associated with this planning application and send ad hoc email messages and notifications. See Working with Ad Hoc Communications and Working with Application Communications .
Status History	View the history of application status changes. Whenever the status changes for a transaction, the change is recorded and viewable in the details for the application. The status history is display-only. See Viewing Application Status History .

Viewing the Planning Application Detail Overview

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

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

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

Only agency staff can update the date the application was received and the description, assign a planner, or withdraw an in-progress application on the Overview page.

Using the Overview Page

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

Page Element	Description
Status	Review the application status.
Completed Date	Review the date the application was completed.
Planner	Review the name of the planner assigned to the planning application.

Page Element	Description
	Only agency staff can assign or reassign a planner to the application by clicking the Assign or Reassign link, respectively. Click the Planner Assignment History icon next to the Planner field to view a history of planner assignments. When you assign or reassign a planner, the workflow task – Assign Planner will be updated to <i>Planner Assigned</i> status. For details about workflow tasks, see <i>Using Workflow</i>. You can configure the Business Rules Framework to trigger the advancement of the workflow task and to generate a communication to the applicant and the assigned planner. For example, once a planner is assigned and the Activity Tracking is updated to complete, the Business Rules Framework will automatically advance the workflow to the next task. For more details, see <i>Business Rules Framework Overview</i> and <i>Setting Up Business Rules</i>.
Description	Enter a description of the application by clicking the Add link in the Description field. Only agency staff can add a description.
Submitted By	Review the name of the person who submitted the application and the date when it was submitted.
Received Date	Review the date when the planning application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page. For applicants submitting their application online, the received date field isn't available in the intake form or on the Overview page. If the planning application is set up for activity tracking, the received date is used as the base date for calculating the activity due date after the application is submitted. The due date is recalculated when you make changes to the received date.
Expiration Date	Review the expiration date of the application. If the Extend link is available next to the Expiration Date field, agency staff can enter a new expiration date that allows more time before the application expires. Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the planning application type, you might see a notification that the application expires in the displayed number of days.

Page Element	Description
	For more information about working with application expiration, see Expiration Overview and Working with Application Expiration .
Withdraw Application	Click the Withdraw Application button to change the application to a withdrawn status. When you withdraw an application, any scheduled pre-application meetings or public hearings are canceled. For more information about withdrawing an application, see Withdrawing an Application.

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

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

Withdrawing an Application

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

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

You can withdraw permit applications with one of these statuses:

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

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

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

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

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

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

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

Withdrawing In-Progress Applications

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

To withdraw an application:

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

Working with Planners

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

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

Assign Planner

PreApp-2019-00008

PreAppMeeting

The assigned planner is Susan Anderson.

Planner List

History

Name	Job Title
☐ Andy Jones	Plan Coordinator
☐ Angela Williams	Permit Technician
☐ Black Swan	Planning Assistant
☒ Susan Anderson	Principal Planner

Cancel

Save

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

Assigning a Planner

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

If a planner has already been assigned, you can click the **Reassign** link to select a different planner.

4. Select the check box for the planner to assign them to the planning application.
5. Click **Save** to save your selection.

Viewing Planner Assignment History

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

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

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

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

Related Topics

- [Viewing the Planning Application Detail Overview](#)

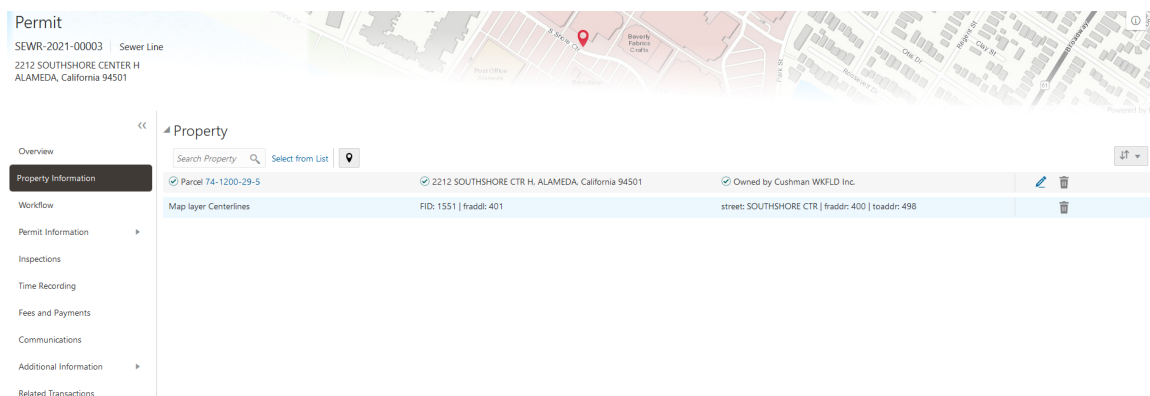
Working with Property Information

Property information displays the properties and other GIS objects associated with a transaction. Use this page to add or remove associated GIS objects.

Property information is configured on the application forms by the agency during the design process. When filling out an application, the public user enters information, which is then displayed in the detail pages of the transaction.

Only agency staff can update information on the Property Information page after an application has been submitted.

This example shows the Property Information page.



Permit
SEWR-2021-00003 | Sewer Line
2212 SOUTHSORE CENTER H
ALAMEDA, California 94501

Property

Search Property | Select from List | 

 Parcel 74-1200-29-5	 2212 SOUTHSORE CTR H, ALAMEDA, California 94501	 Owned by Cushman WOLF Inc.	 
Map layer Centerlines	PID: 1551 #addr: 401	street: SOUTHSORE CTR #addr: 400 toaddr: 498	

Overview
Property Information
Workflow
Permit Information
Inspections
Time Recording
Fees and Payments
Communications
Additional Information
Related Transactions

Viewing Property Information

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

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

Note: The primary parcel, address, and owner are indicated with a green check mark. This address is also displayed in the header information of the summary page. Click the parcel number link to open the corresponding Parcel Details page in a new window.

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

Adding New Properties

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

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

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

Adding Existing Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. To add a single property:
 - a. Use the **Search Property** field to find the property that you want to add.
You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.
 - b. Click the property to add it to transaction. The selection appears in the grid on the Property Information page.
5. To add multiple properties:
 - a. Click **Select from List** to access the Search Property modal page.
 - b. Search for the properties that you want to add and select the check box next to them.
You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.

You can view all of the selected properties in the Selections tab.

- c. Click **Done**. All of the properties that you selected appear in the grid on the Property Information page.

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

Adding Properties and other GIS objects from the Map View

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

The object is highlighted on the map and added to the list of objects associated with the transaction.

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

Modifying Property Details

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

Note: This icon is not available for GIS objects that are not related to a property, so you can't edit them.

5. Update parcel, address, and owner information on the Property Information modal page.

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

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

Deleting a Property

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

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

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

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

Viewing Application Information

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

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

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

Planning Application
AUP-2019-00002 Administrative Use Permit
2160 OTIS DR ALAMEDA, CA
HOLD_2019021271030054 All Conditions: 1

Administrative Use Permit

- Overview
- Property Information
- Workflow
- Planning Application Information**
 - Application Details
- Hearing
- Contacts
- Conditions
- Attachments
- Comments
- Fees and Payments
- Projects
- Communications
- Additional Information

Site Data [Edit]

Site Use [Edit]

Existing Setbacks [Edit]

Proposed Setbacks [Edit]

Proposed Front
Proposed Sides
Proposed Rear

Parking [Edit]

Required Parking Spaces
Proposed Parking Spaces

Submittal Requirements [Edit]

Describe all applicable requests for this project, such as variances, flex or reserve units, zoning changes, special exceptions, or incentives. If applicable, provide justification for each. Use additional sheets if necessary.
Provide one complete 11"x17" set, including the following documents and drawings: Conceptual Overview (including site and project description), Survey, Preliminary Site Plan, and Elevations, to the Planning Division two business days prior to the conference. An additional 10 sets (11"x17") shall be provided at the time of the Conference.

Description

Updating Application Details

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

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

Using Workflow

Workflow provides a defined structure for the 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 offers 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.

The screenshot displays the 'Workflow' page for a case. On the left, a sidebar lists navigation options: Overview, Timeline, Property Information, Workflow (selected), Inspections, Notices, Case Information, Responsible Parties, Citations, Fees and Payments, and Related Transactions. The main content area is titled 'Workflow' and features a horizontal bar with buttons for 'Violation' (highlighted in green), 'Citation' (blue), 'Appeal', 'Abatement', and 'Compliance'. Below this bar, a list of tasks is shown, including 'Send Notice of Citation ST...' (SUBMIT, By Lola Nguyen, On 3/14/21) and 'Add ADHOC Fees for Notice...' (In Progress, Assigned To CE_Workflow_Case..., Due on). The right panel provides details for the selected task: 'Task Name: Add ADHOC Fees for Notice: STCase-202', 'Task ID: 256392', 'Assigned To: CE_Workflow_Case_v1 17 CE_Demo_Worl', 'Assigned Date: 3/14/21', 'Assigned By: Green Prussian', 'Due Date', 'Priority: Medium', and a 'Form' section. At the bottom, there are sections for 'Comments' and 'Attachments', both currently empty.

Page Element	Description
Stage View and Milestone View icons	Use these buttons to toggle between the stage and milestone views.
Stages	Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below. 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: ○ Blue: Active ○ Green: Completed ○ Gray: Not active or Terminated You can click the buttons in the active and completed stages to view their details in the Task Details panel. 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>.

Page Element	Description
Terminate Workflow	Click this button to stop or terminate a workflow. 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. Note: You cannot activate a terminated workflow.
Form	Use the form to review any information entered by the code enforcement officer or to enter your own information. 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.

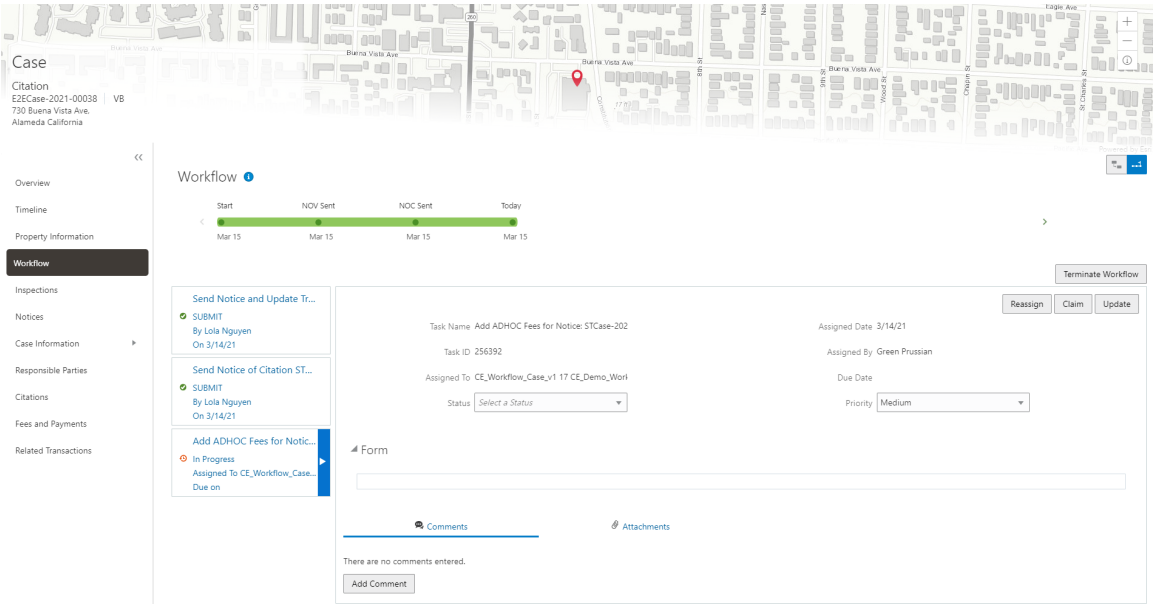
To access the Incident or Case Workflow page in the two-panel, milestone view:

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.
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	Click this button to stop or terminate a workflow. 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. Note: You cannot make a terminated workflow active again.
Form	Use the form to check or enter information as specified by the agency. 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

Using the Two-Panel View in Workflow for an Application

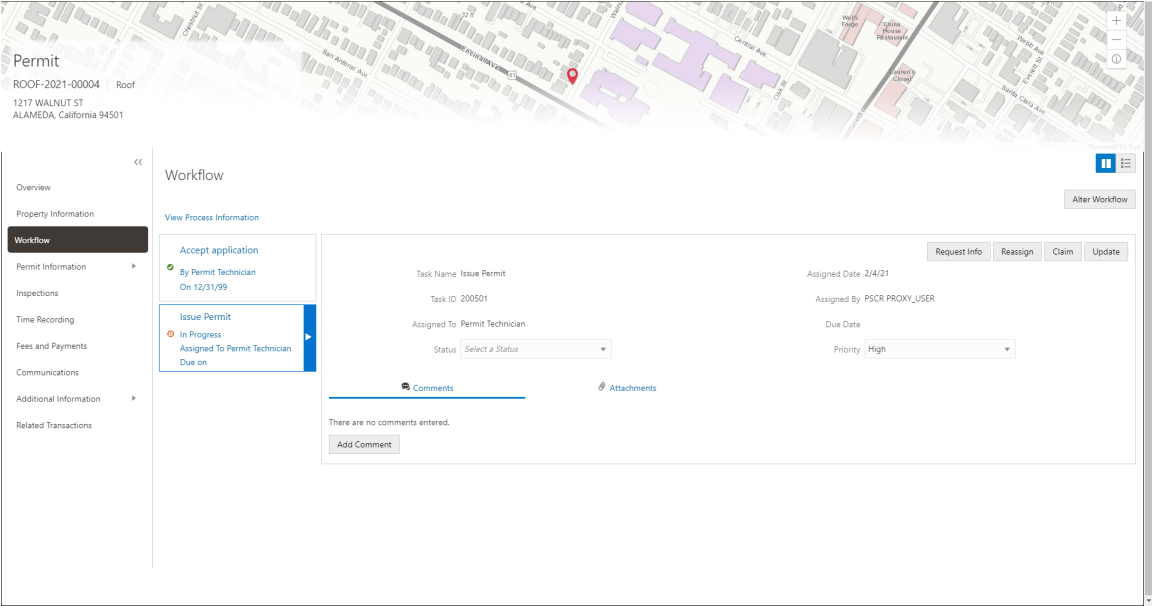
To manage workflow tasks in a two-panel view:

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

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.

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

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

The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.

- **Comments**, which displays the two most recent comments.

For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.

6. To review task history, click a specific task to open the Task Details page.

This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.

7. Close the Task Details page to return to the workflow list view.

Altering Workflow

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

To alter workflow:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Alter Workflow** button.
5. On the Alter Workflow make these changes:
 - **New Workflow Activity Name:** Select the desired workflow step.
 - **Update Transaction Status:** Select the proper status for the workflow step. You can't alter a workflow step back to a pending status.
 - **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.

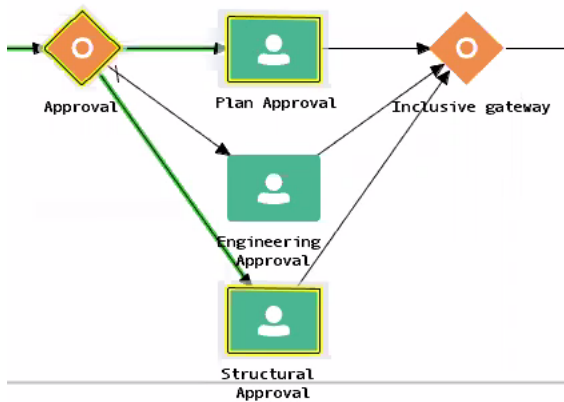
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- 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 Reports

Once a planning application is created, a corresponding report object is automatically created and is available in the planning application details. As agency staff, you generate a report from the report object, review, and print it for dispatch. Agency staff can also manually create ad hoc reports for an application.

To access the report:

Navigate to **Agency Springboard > Planning Applications** . Select the application. Select **Reports** in the left navigation panel.

Viewing Reports

The Reports page shows the list of all reports for an application. You can view the information and perform actions as described here:

Page Element	Description
Report Name	View the name of the report.
Report Type	View the type of report: <i>Ad hoc</i> <i>System generated</i>
Application Status	View the status of the application: <i>Pending</i> <i>Submitted</i> <i>Accepted</i>
Status	View the status of the report: <i>Pending</i>: Indicates that the report object is created. <i>In Progress</i>: Indicates that details are entered in the report, and saved. <i>Generated</i>: Indicates that the report is generated and printed. <i>Sent</i>: Indicates that the report has been sent to the concerned party. <i>Received</i>: Indicates that the report was received by the concerned party.
Attachment	Icon to indicate that a report was generated.
Actions	Select from the available options, which are based on the status of the application: <i>Generate</i>: Click to open the Generate Report page and generate the report. This option is available only for reports in the Pending status. <i>Continue</i>: Click to open the Generate Report page of a previously saved report. This option is available only for reports in the In Progress status.

Creating an Ad Hoc Report

To manually create an ad hoc report for an application:

1. Navigate to **Agency Springboard > Planning Applications** . Select the application. Select **Reports** in the left navigation panel.
2. Click the **Add** button.
3. On the Add Ad Hoc Report page, select a report from the list. You can use the Search option to search for and select the ad hoc report type. Selecting the ad hoc report type returns you to the Reports page.

4. The new ad hoc report is now listed on the Reports page.

Generating a Report

To generate a report:

1. Navigate to **Agency Springboard > Planning Applications** . Select the application. Select **Reports** in the left navigation panel.
2. Select the report row which you want to view and click the **Generate** button.
Note: This option is available only for the reports in the Pending status. If the status is in In Progress, you will see the Continue option. Use this option in case the report was generated earlier and saved for later.
3. On the Generate Report page, click Review and Print. The report page opens in a new window. You can review the details, print the document, and send it to the applicant.
4. Click Cancel to close the window and return to the report at a later time. You can use the Continue button to access this page later.
5. Click Done on the Generate Report page. The status of the report changes to Generated and the report is available as an attachment.

Viewing Report Details

To review the details of the reports that are in the *Generated* or *Sent* status:

1. Navigate to **Agency Springboard > Planning Applications** . Select the application. Select **Reports** in the left navigation panel.
2. Select the report row that you want to view.
3. On the Report Details page, the top section shows the report name, status, and report type.
The Attachments section allows you to view details, download and delete attachments. Example of an attachment can be a copy of the report that was sent to the applicant.

Working with Meetings

Meetings are scheduled between registered public users and agency staff to review and discuss the requirements of the application submitted for business license, pre-application, or planning application.

Business License: A consultation meeting is scheduled between the registered public user who has submitted a consultation application and the agency assigned specialist – to review and discuss the requirements of the business license.

Applicants and authorized agency staff schedule consultation meetings. The authorized staff are the business license manager and the business license specialist.

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

Applicants and authorized agency staff schedule meetings. The authorized staff include the planning assistant, zoning administrator, principal planner, and associate planner.

Administrators configure the system to enable the applicants and the agency staff to schedule meetings – using the Meeting Setup Template page. See [Setting Up Meetings](#).

Scheduling a Meeting

Specialists schedule consultation meetings on the Business Consultation Meeting Request page.

Planners use the Pre-application Meeting Request page for scheduling pre-application meetings and the Planning Application Meeting Request page for planning application meetings.

Applicants can schedule a meeting depending on the scheduling configuration on the Meeting Setup Template page. See [Setting Up Meetings](#).

To schedule a meeting:

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, pre-application, or the planning application record for which you want to schedule a meeting. The detail page opens.
3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.
4. Click the **Meetings** link to view the meetings page for the application.
5. Click the **Schedule Meetings** button.
6. On the meeting request page, the meeting subject, agenda, and the location are displayed as set up in the meeting template applied. Enter values for the following fields:

Page Element	Description
Meeting Subject	Review the subject for the meeting. Note: Only specialists or planners can change the subject of the meeting.
Meeting Agenda	Review the agenda for the meeting. Note: Only specialists or planners can change the agenda of the meeting.
Scheduled Date	Select a date to schedule the meeting. The dates available for scheduling your meeting are based on the meeting template applied and the agency's holiday calendar. See Setting Up Planning Application Types for the pre-application meeting template and Setting Up Business License Types for the consultation meeting template. For more details about templates, see Setting Up Meetings.
Scheduled Time	Select the start time of the scheduled meeting. The time values available for scheduling your meeting are based on the template applied by the administrator.

Page Element	Description
Meeting Duration in Hours	View the duration of the meeting, which is set up by the administrator in the template applied.
Meeting Location	View the location of the meeting. Only specialists or planners can change the location of the meeting.
Invitees	View the list of additional invitees for the meeting. Agency staff can add or remove invitees.

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

Workflow tasks are automatically updated using the Business Rules Framework when meetings are scheduled.

- When you schedule a business meeting, the workflow task **Schedule Business Consultation** will be updated to *Completed*.
- When you schedule a pre-application or planning application meeting, the workflow task **Schedule Meeting** will be updated to *Completed*.

For more about workflow, see [Using Workflow](#).

You can configure the Business Rules Framework to trigger the generation of a communication to the applicant and the assigned planner. For more information, see [Business Rules Framework Overview](#) and [Setting Up Business Rules](#)

Communication using the Meeting template: An online notification and email are sent to the applicant and to the assigned agency staff, with the schedule and details of the meeting — depending on the meeting setup template applied. Invitees receive an email about the meeting.

Adding Comments to a Meeting

Presently, the Comments functionality is available only for Planning Applications, and not for Business License and Pre-applications.

Comments enable you to add additional information to a meeting schedule. To add a comment:

1. Access the meetings page.
2. Click the **Add Comment** icon.
3. On the Comments page, add a new comment by entering the text. You can use the Rich Text options for formatting.
4. To add a comment by selecting from a list of existing comments:
 - a. Click **Select Comments** on the Add Comments page.
 - b. On the Select Comments page, click Favorite, Standard, or Recent to see the corresponding list of comments. For more information about standard comments, see [Working with Comments](#).

Modifying and Deleting Comments in a Meeting

1. Access the meetings page.
2. Click the **Comments** icon in the condition record.
3. On the Comments page, select the comment you want to modify.
4. Make changes to the text and click **Save**.
5. To delete the comment, click the **Delete** icon on the Comment page.

Viewing Meetings

- Agency staff and registered public users view a list of meetings through their transactions page:
 - Registered users and specialists: Business Consultation Meetings page.
 - Registered users and planners: Pre-application Meetings page or Planning Application Meetings page.
- Agency staff can also use the Calendar to view all the meetings scheduled at the agency level or just view their own meeting schedules. The following sections detail the two ways of viewing meeting schedules.

Viewing Meetings through Transactions Page

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, pre-application, or the planning application record for which you want to schedule a meeting. The detail page opens.
3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.
4. Click the **Meetings** link to view the meetings page for the application.
5. View the list of meetings, including this information:

Page Element	Description
Meeting Details	View the date of the meeting along with the timings and status.
Subject	View the subject of the scheduled meeting.
Meeting Location	View the location of the scheduled meeting.
Invitees	View the list of additional attendees added by the agency staff when scheduling the meeting.
Reschedule	Click to open the meeting request page and select a new date and time for the meeting. See the section Rescheduling a Meeting .
Cancel	Click to cancel the scheduled meeting.

Viewing Meetings on the Calendar

Agency assigned staff can use the Calendar to view their own meeting schedules or all the meeting schedules for the entire agency.

- **Specialist Calendar** shows the consultation meetings.
 - **Planner Calendar** shows the meeting schedules for pre-application, public hearing, and planning application meetings.
1. Select the **Specialist Calendar** tile (for business license) or the **Planner Calendar** tile (for pre-application, hearing, and planning application) on the Agency Springboard.

Planners can also access the planner calendar from the Planner Worklist. On the Agency Springboard select **Planner Worklist > Calendar**. For more information on Planner Worklist, see [Using the Planner Worklist](#).

2. On the Business Consultation Calendar page (for business license) or the Planner Calendar page (for pre-application, hearing, and planning application) you can view the details of the meeting schedule. Click the application link to access the transaction application page.
3. On the calendar page you can perform the following actions:

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

Rescheduling a Meeting

You reschedule a meeting on the meetings page. Applicants can reschedule their meetings only if the administrator has enabled the settings in the template that is applied.

Note: To schedule, reschedule, or cancel public hearing meetings related to planning applications, see [Working with Public Hearings](#).

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, planning application, or the pre-application for which you want to reschedule the meeting.

3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.
4. Navigate to the **Meetings** link to view the meetings page for the application.
5. On the record of the meeting you want to reschedule, click the **Reschedule** button.
6. On the meeting request page you can select a new available date and time for the meeting.

Note: Only specialists or planners can edit the subject, agenda, and location of the meeting.

7. Click **Schedule**.

The meetings page now lists the newly scheduled meeting record and the previous meeting record shows with a status of Canceled.

An online notification and email are sent to the applicant and to the assigned agency staff, with the updated meeting schedule — depending on the setup in the Communication template. For more information on communication event templates, see *Setting Up Communication Templates*.

Canceling a Meeting

You cancel a meeting on the meetings page related to the transaction.

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, planning application, or the pre-application for which you want to reschedule the meeting.
3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.
4. Click the **Meetings** link to view the meetings page for the application.
5. On the record of the meeting you want to cancel, click the **Cancel** button.
6. Click **OK** to confirm. The meeting page now lists the meeting record with a status of Canceled.

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

Working with Pre-application Outcome

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

Applicants and agency staff review the summary information and comments entered by their assigned agency planner on the Pre-application Outcome page and proceed with creating and linking the required applications.

Adding a Required Application

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

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to add the required applications. The pre-application details page opens.
3. Click **Planning Application** in the left panel.

4. Click the **Pre-application Outcome** link to access the Pre-application Outcome page, which lists all the required application types added for the submitted planning application.
5. Click the **Add** button to open the Required Application page and enter values for the following fields:

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

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

Adding a Review Comment

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

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

Viewing the Pre-application Outcome

To view the summary information:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to add your review comment. The pre-application details page opens.
3. Click **Planning Application** in the left panel.
4. Click **Pre-application Outcome** in the left panel to open the Pre-application Outcome page.
5. In the Required Application section, view a list of application types that are required for your submitted planning application. Find additional information:

Page Element	Description
Application Type	View the type of application required.
Application	Use the available options: ○ <i>Create</i>: Click to open the Create Application page. The system automatically populates the application form with values copied from the applicant's pre-application. You can make changes and save or submit the application.

Page Element	Description
	◦ <i>Link</i>: Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click Save. The Pre-application Outcome page now lists the application you just selected. ◦ <i><Application></i>: Click to open the Overview page of the linked planning application. ◦ : Click to remove the link from the required application type.
Status	View the status of the application type. For example, Not Started and Inspection. The Not Started status Indicates that no application has been created or linked for the identified application type.
Comments	View the comments included by the planner regarding the application type.
Action	Select an action you want to perform on the transaction: ◦ <i>Edit Comments</i>: Click to open the Required Application page and update the comments. ◦ <i>Delete</i>: Click to delete the required application type. you can't delete a required application type that is linked to an application. Note: These actions are available only to planners.

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

Working with Conditions of Approval

You apply a set of conditions of approval to a user-submitted planning application. Conditions of approval can be applied automatically through a template or added manually from the Conditions of Approval page.

Note: Only agency staff can apply and manage conditions of approval.

Viewing and Updating Conditions of Approval

The Conditions of Approval page lists all conditions including those that are automatically applied as well as the planner applied conditions. To view the conditions of approval:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to view the conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page, which lists all the conditions applied to the submitted planning application.

The conditions that are applied by the system are identified as *Automatic* in the **Updated By** attribute. The remaining conditions show the name of the agency staff who applied them.

5. Select a condition row to view its complete details on the Conditions of Approval detail page.
6. If you want to update the details of a condition, select the record row to open the Conditions of Approval detail page. You can change the values for status, category, subcategory, and compliance period.
7. Click **Save** to save the changes and return to the Conditions of Approval page.

Adding New Conditions

In addition to the already applied conditions, you can apply conditions to the selected planning application. To add a new condition:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to add conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Add New** button to open the Add Condition of Approval page and enter values for the following fields:

Page Element	Description
Name	Enter a name for the new condition. You can add more information and use the Rich Text formatting options.
Status	Select a status: ○ <i>Applied</i> ○ <i>Resolved</i>
Condition Type	Displays <i>Custom</i> as this condition is added manually by an agency staff.
Category	Select a category of the condition.
Subcategory	Select a subcategory of the condition.
Compliance Period	Select one or more compliance period values using the check boxes.

6. Click **Save** to apply the condition to the application. If you want to add more conditions, use the **Save and New** button, which applies the current condition and clears the values in the page so that you can enter a new set of values for the next condition.

Applying Existing Conditions

You can also apply standard conditions of approval saved in the system. To select and apply conditions of the type standard:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to apply existing conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Select Existing** button to open the Condition of Approval list page.
6. Search and select one or more standard conditions using the check boxes. The Selections tab shows all your selected conditions.
7. Click **Save** to apply the condition to the planning application.

Resolving Conditions

To resolve a condition of approval that is applied to a planning application:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to resolve the conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Actions** button for the condition you want to resolve and then select **Resolve**.
6. The status of the condition changes to **Resolved**.

Deleting Conditions

To delete a condition that is applied to a planning application:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record from which you want to delete the conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Actions** button for the condition you want to delete and select **Delete**.
6. The condition row is removed from the Conditions of Approval page.

Generating the Conditions of Approval Report

The conditions of approval report records the details of the planning application followed by the details of the conditions of approval. Review the description of the application, the name of the assigned planner, and the list of all the conditions applied to the application. The list follows the sequence of conditions based on the sequence of the condition type and category that are setup. See [Setting Up Condition Type Sequences](#) and [Setting Up Conditions of Approval Categories](#).

To generate and view the conditions of approval report:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to generate the conditions of approval report. The application details page opens.

3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Generate Report** button. The conditions of approval report opens in a new window. You can print or save the report.

Note: Your browser's pop-up blocker must allow pop-up windows from the environment domain to generate the report.

Adding Comments to a Condition

Comments enable you to add additional information to a condition of approval. To add a comment to a condition:

1. Access the condition of approval.
2. Click the **Add Comment** icon.
3. On the Comments page, add a new comment by entering the text. You can use the Rich Text options for formatting.
4. To add a comment by selecting from a list of existing comments:
 - a. Click **Select Comments** on the Add Comments page.
 - b. On the Select Comments page, click **Favorite**, **Standard**, or **Recent** to see the corresponding list of comments.

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

Modifying and Deleting Comments in a Condition

1. Access the condition of approval.
2. Click the **Comments** icon in the condition record.
3. On the Comments page, select the comment you want to modify.
4. Make changes to the text and click **Save**.
5. To delete the comment, click the **Delete** icon on the Comment page.

Adding Attachments to a Condition

Use attachments as supporting documents to manage conditions of approval. To add an attachment to a condition:

1. Access the condition of approval.
2. Click the **Attachments** icon in the condition record.
3. On the Attachments page, click **Add**, navigate to and select the attachment file.
4. Enter a description about the attachment.
5. Click **Upload**.

Deleting Attachments from a Condition

1. Access the condition of approval.
2. Click the **Attachments** icon in the condition record.
3. On the Attachments page, select the **Actions** button for the attachment you want to delete.
4. Click **Delete**.

For more information about attachments, see [Working with Attachments](#).

Accessing Plan Reviews for Planning Applications

Click the **Plan Reviews** link to access the plan reviews page for the planning application. For more information on plan reviews see *Managing Manual Plan Review Cycles* and *Managing Electronic Plan Review Cycles*.

Working with Contractors and Agents in Applications

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

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

Adding Contractors to a Transaction

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

To add contractors and their license information to a transaction:

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

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

If the agency integrates with an external licensing board, the system may retrieve details from that organization when the contractor doesn't yet exist in the internal system. If the details can't be retrieved, messages inform you that the license number isn't valid or has been disabled for use. If you are sure that the number is valid, a system administrator can manually fill in the additional details.

In some cases, the agency limits contractor selection to the records in their agency-maintained contractor list. You can only retrieve details for licenses in the list. This restriction applies to all users filling out an application. License information can be retrieved by looking up the license number, business name, or owner name.

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

On the Contractor page in the license grid, you'll see the information for the license you just added, including the contractor's or authorized agent's business name and contact information and the dates when the license is valid. Look

in the column **Authorized Agent for This License** to see if the agency's contractor records or licensing body indicate whether this person is an authorized agent for the license.

Updating Contractor Information for a Transaction

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

Removing Contractors from a Transaction

Only system administrators and agency management with appropriate permissions can delete contractors after application submission.

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

Updating the Applicant's Status as an Authorized Agent

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Click **Edit**.
4. Make any necessary updates to the **Authorized Agent** section of the page:

- a. Use the **Is the applicant an authorized agent?** switch to indicate whether the applicant is acting on behalf of the contractor.

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

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

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

5. Click **Save**.

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

Working with Public Hearings

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

As a registered public user, you can use the Hearings page to view a complete list of hearings for your planning application, request appeal and pay the appeal fees.

Viewing Public Hearing for a Planning Application

To view a public hearing:

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

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

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

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

Page Element	Description
Hearing Decision	View the decision made by the hearing body.
Action	The options under this menu is determined by several factors such as the user logged in, the schedule status, the hearing status, and the hearing decision. For details about the Action menu, see the section Finalizing the Hearing.

Scheduling and Finalizing a Public Hearing

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

- Select the **Hearing Scheduler** tile on the Agency Springboard and then select the application for which you want to schedule a hearing.
- Access the application for which you want to schedule a hearing and then add a hearing using these steps:
 - a. Select the **Planning Applications** tile on the Agency Springboard.
 - b. On the Planning Applications tab of the Transactions page, select the application for which you want to add a hearing.
 - c. On the Planning Application page, click **Planning Application** in the left panel.
 - d. Click the **Hearings** link under **Planning Application** to view the Hearings page.

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

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

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

Using the Hearing Scheduler Page

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

- Schedule a hearing for your assigned application. Drag the selected application item from the left panel onto one of the desired available dates in the calendar space. You can also click the **Schedule** button on the application item and enter schedule details.
- Reschedule a hearing for your assigned application. Either drag and drop the application item to a new available date or use the **Reschedule** action on the scheduled application item.
- Insert a new date in the calendar that is not available on the scheduler. Use the new date to schedule or reschedule hearings.

- Finalize a hearing. The schedule status of each hearing appears as tentative until you finalize the hearing by using the Finalize action.

Page Element	Description
Hearing Body	Lists all the applicable hearing bodies available in the hearing hierarchy. For a selected hearing body, the left panel lists all the applications that are ready for scheduling hearings. The calendar workspace lists the dates as per the recurrence pattern set up and their corresponding hearing schedules.
	Click to open the calendar and select a date that is not listed on the scheduler. Click Insert Custom Date in the calendar to add the new date record in the scheduler. You can schedule a new hearing on this date or drag and drop application items from another date into the date space. Use the cancel button available on the custom date to remove from the scheduler. You can delete a custom date only if there is no hearing scheduled on that date. Note: This button is available to agency staff with appropriate permissions.
Select a Date	Click to open the calendar and select a date. The calendar displays only the available schedule dates for the selected hearing body.
	Allows you to view the previous and the next set of available schedule dates for the selected hearing body.

Finalizing the Hearing

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

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

Performing Actions

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

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

Page Element	Description
Update Staff Decision	Click to add or update the staff decision.
Generate Notifications List	Click to open the Generate Notifications List page that allows you to download a report containing the addresses within a given geographic radius. You can use the Mail Merge tool to send post cards to the selected addresses. See Generating a Hearing Notifications List .
Reschedule	Click to open the Reschedule page in which you can change the schedule status and select a new hearing date for the hearing.
Cancel	Click to cancel the hearing. The date will be made available for the other hearing schedules. This option is available based on the access permissions for the user logged in.
Finalize	Click to finalize the date you selected at the time of scheduling.
Request Appeal	Click to escalate the application to the next higher hearing body in its hierarchy. The system automatically creates a new schedule with the next higher hearing body and with the schedule status – <i>Not Scheduled</i> . You manually schedule a date for the new hearing. Note: The hearing decision made by the highest hearing body in the hierarchy is the final. The option to appeal is not available for the particular hearing. See the next section for details on requesting appeal.

Updating Hearing Decision

The agency staff can make updates to a hearing decision once the schedule status is finalized.

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application you are working with.
3. On the Planning Application page, click **Planning Application** in the left panel.
4. Click the **Hearings** link under **Planning Application** to view the Hearings page.
5. On the hearing row for which you want to update the hearing decision, click the **Actions** icon and select **Update Hearing Decision**.
6. View the details of the hearing on the Update Hearing Decision page. Select a decision from the Hearing Decision drop-down list, such as *Approved*, *Continue*, *Denied* or *None* and enter comments.

Page Element	Description
Hearing Body	View the name of the hearing body.
Schedule Status	View the status of the hearing schedule:

Page Element	Description
	○ Tentative ○ Final Note: Once the hearing schedule is finalized, the status cannot be changed to Tentative.
Hearing Date	View the date on which the hearing was scheduled.
Hearing Decision	Update the hearing decision: ○ Approved ○ Continue ○ Denied ○ None
Comments	Enter comments regarding the hearing decision.

- Click **Save** to save the changes or **Cancel** and return to the Hearings page.

When you update the hearing decision, the workflow task **Hearing** is updated accordingly, using the Business Rules Framework configuration. For more information about workflow, see [Using Workflow](#).

Updating Staff Decision

Agency staff who are aware of a particular planning application may give their independent decision on the application. These staff decisions may aid the hearing body to make their decision. Depending on the agency, staff decisions may or may not be a pre-requisite to the hearing decision. Agency staff can add or update a staff decision once the schedule status is finalized.

- Select the **Planning Applications** tile on the Agency Springboard.
- On the Planning Applications tab of the Transactions page, select the application you are working with.
- On the Planning Application page, click **Planning Application** in the left panel.
- Click the **Hearings** link under **Planning Application** to view the Hearings page.
- On the hearing row for which you want to update the staff decision, click the **Actions** icon and select **Update Staff Decision**.
- View the details of the hearing on the Update Staff Decision page.

Page Element	Description
Hearing Body	View the name of the hearing body.
Schedule Status	View the status of the heading schedule.

Page Element	Description
Staff Decision	Update the staff decision: ○ Approved ○ Denied
Staff Decision Date	Click to open the calendar and select a date. You can select any date from the date on which the hearing was scheduled to add a staff decision.
Comments	Enter comments regarding the staff decision.

7. Click **Save** to save the changes or **Cancel** and return to the Hearings page.

Viewing the Hearing Details

Agency staff can view all details regarding the hearing, as well as the staff decision.

Page Element	Description
Hearing Body	View the name of the hearing body.
Schedule Status	View the status of the heading schedule.
Hearing Date	View the date on which the hearing is scheduled.
Hearing Decision	View the hearing decision status.
Comments	Enter comments regarding the hearing decision.
Appeal Status	View the appeal status.
Appeal Date	View the date on which an appeal was filed.
Staff Decision Date	View the date on which a staff decision was added.
Staff Decision	View the staff decision added.
Comments	View any comments for the staff decision.

Generating a Hearing Notifications List

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

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

To generate a hearing notification list:

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

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

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

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

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

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

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

In brief, the two selection methods are:

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

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

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

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

9. Click **Apply**.

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

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

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

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

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

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

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

The notification process is not part of the Oracle system.

Working with Appeals

Registered public users can request an appeal for the hearing decision they received on their application. They can view the details of the appeal on the Hearings page, as well as pay the appeal fees. Agency staff can request an appeal and pay the fees on behalf of an impacted user.

Requesting an Appeal

Use the Hearings page to request an appeal:

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

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

Once the due date for requesting an appeal is crossed, the workflow task **Hearing** is updated using the Business Rules Framework configuration. For more details on workflow and framework configuration for workflow, see [Using Workflow](#) and [Setting Up Update Workflow Actions](#).

The agency can also 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](#).

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

Page Element	Description
Appeal Date	Choose any day within the appeal period to request an appeal. The appeal period extends from the day the hearing was scheduled to the current day.

Page Element	Description
Select Appellant	Click to search and select the appellant.
Appellant Type	Available values are Applicant and Non-applicant . Agency staff can override the default selection.
Appeal Fee (USD)	Displays the appeal fees to be paid.
Reason for Appeal	Enter a reason for the requested appeal.
Attachments	Click the Add icon to browse and select a document attachment.

7. Click the **Confirm and Pay** button, which takes you to the Checkout page to make the payment. On returning to the Hearings page, the hearing row displays a confirmation text — *Appeal submitted*.

The system automatically creates a new schedule with the next higher hearing body and with the schedule status – *Not Scheduled* and confirmation text *Appealed hearing* . Agents manually schedule a date for the new hearing. See the section "Scheduling and Finalizing a Public Hearing" in *Working with Public Hearings*.

Viewing an Appeal Request

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

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

Viewing Appeal Fee Details

Once an appeal fee is paid, agency staff as well as registered public users can view the appeal fee details that are created for their application.

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

Adding Contacts to Applications

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

The Contacts page displays the applicant's contact information and lists additional people who were added as contacts during the initial application process or after the application was submitted. There are two options for adding more contacts:

- Select a contact from the user's account profile, and make that person a contact for the current transaction. This option is available only for system administrators and business analysts.
- Create a brand new contact by entering all the contact details, and include that contact in the current transaction.

Note: Applicants and contacts can view and add contacts to their own permits as well as update and delete the contacts they added. Before contacts can manage other contacts, 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.

Managing Application Contacts

To manage application contacts:

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

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

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

The Contact Details page has two sections:

- The **Add from registered contacts** section lists existing contacts from the user's account profile that can be added to the application.
 - The **Add brand new contact manually** section provides a **Create** button for creating new contacts from scratch.
7. To add existing contacts to the application:
 - a. Click the **Add** button.
 - b. On the Contact Details page, click the row of the contact you want to select from the user's account profile in the **Add from registered contacts** grid.
 - c. In the Select Contact Type modal window, enter the following information:

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

- d. Click **OK** to save the record and return to the Contacts page, which now lists the selected contact as a contact for this application.

8. To create a brand new contact:

- a. Click the **Add** button.
- b. On the Contact Details list page, click the **Create** button in the **Add brand new contact manually** section.

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

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

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

- d. Enter the following additional information:

Page Element	Description
Primary	Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.

Page Element	Description
Contact Type	Select the role or position of the contact person relative to the current application. For example, a contact might be a property owner, a business owner, or a contractor. When you add contacts for a permit, pay close attention to whether the contact type grants the person access to the permit. You can see the Permit Access Enabled field when you prompt for the contact type and when you review the list of contacts on the main Contact page. This information doesn't appear in the context of non-permit applications. If the contact type allows permit access <i>and</i> the contact email matches the account email for a registered user, then that registered user can access the permit. For more information, see Setting Up Contact Types.
Business Name	If the contact represents a business, enter the business name.

- e. Click **Save** to save the new contact and return to the Contacts page.
The Contacts page now includes the new contact in the **Additional Contacts** list.
9. To modify information about an application contact:
 - a. Click the row for the contact.
 - b. On the Contact Details page, update the detail information.
If the contact is a profile contact, you can't modify the contact's name. If the contact exists only in this application, all fields are available for edit.
 - c. Click **Save**.
10. To remove a contact from an application:
 - a. Click the row for the contact.
 - b. On the Contact Details page, click **Delete**.
Contacts who are profile contacts are not deleted from the system, they are only removed from the current application. Contacts that exist only in the current application are deleted entirely.

Applying Conditions to Applications

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

Agency staff apply, modify, and resolve conditions on the Conditions page. The Conditions page lists all of the conditions applied to the selected application, with applied conditions followed by resolved conditions.

The condition indicator in the header of the details pages displays the most severe condition having a high priority. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, source, applied date, and display message.

Note: The condition indicator is displayed on all pages across transactions. If more than one active condition is applied, the icon indicates the most severe condition. A condition is active until it is changed to *Resolved*.

Automatically Applying Conditions

Conditions can also be applied to transactions automatically using the Business Rules Framework. Your agency administrator must configure the following to apply conditions to submitted applications:

1. **Workflow:** Triggers the Business Rules Framework to apply the condition.
2. **Business Rules Framework:** Applies the condition to the transaction that meets the criteria defined in the rules of the Business Rules Framework.

Once the condition is applied to the transaction, you can view the condition record on the Conditions page of the transaction.

For information on setting up actions related to workflow, see [Setting Up Update Workflow Actions](#) and for setting up and applying conditions using the Business Rules Framework, see [Setting Up Apply Condition Actions](#).

Applying a Condition to a Transaction

You manually apply conditions to transactions on the Apply Condition page.

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Select a transaction row.
3. On the Overview page, select the **Conditions** tab, which may be listed under the Permit Information or Planning Application heading in the navigation bar.
4. On the Conditions page, view the list of applied and resolved conditions. Click **Apply Condition**.
5. Enter values for the fields on the Condition Details page:

Page Element	Description
Condition Name	Use the lookup prompt to search and select the condition that you want to apply. The search page lists all available conditions along with their severity, display message, and description. After you select a condition, the condition information is brought in as it was defined in the condition definition. You can override the default rules, priority, description, and additional information to customize the condition. For more information on conditions, see Setting Up Conditions.
Display Message	Displays the message associated with the selected condition. This message is entered by your agency administrator in the condition definition and can't be updated here.
Severity	Displays the level of severity defined for the selected condition. ○ <i>Lock:</i> This severity suspends all operations and selects all rules for the condition. ○ <i>Hold:</i> This severity enables agency staff to select the rules that apply to the condition.

Page Element	Description
 Lock  Hold  Notice	◦ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Condition Rules	Select one or more rules from: ◦ Prevent Workflow Advancement ◦ Prevent Issue or Final ◦ Prevent Payment ◦ Prevent Inspection Schedule (applicable only to permits) ◦ Prevent Inspection Result (applicable only to permits) ◦ Prevent Final Inspection (applicable only to permits) Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied. The condition rule <i>Prevent Application Progress</i> is only applicable to conditions on persons, parcels, and property addresses. See Setting Up Conditions.
Priority	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
Description	Displays the description as entered by your agency administrator in the condition definition, but you can update the text here.
Additional Information	Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.

When you're viewing the condition details after the condition was applied, you'll see the name of the user who applied the condition and the date. *System* is displayed if the condition is applied to the parcel, address, or person associated with this transaction.

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

Resolving a Condition

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

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.

2. Select a transaction row.
3. Click **Conditions** in the left panel.
4. Click **Resolve** for the condition you want to resolve.
5. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
6. Click **Save**.

The resolution is applied and the resolved condition is listed at the bottom of the condition list.

Modifying a Condition

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

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Select a transaction row.
3. Click **Conditions** in the navigation bar.
4. Click the **View More Details** button for the condition you want to modify.
5. On the Condition Details page you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

Note: You can't modify any fields for a resolved condition.

6. Click **Save**.

Viewing a Resolved Condition

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

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Select a transaction row.
3. Click **Conditions** in the navigation bar.
4. Select a row with a status of **Resolved** and click **View Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
 - Resolution Action
 - Resolved By
 - Resolved Date

Note: If the **Resolved By** field displays *System*, then the condition was resolved as part of the condition resolution from the parcel, address, or person condition.

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

Related Topics

- [Working with Conditions](#)

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: - Icon indicating the file type - Filename with file type extension <i>File Size</i>
Description	View the description of the attachment as entered by the person who added the attachment.
Source	View the source of the attached file. Valid values are: <i>Permits</i> <i>Inspection</i> <i>Workflow</i> <i>Plan Reviews</i> 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. Attachments added to web form questionnaire responses display <i>Permits</i> in this field. Note: This column appears only on the All tab for permits.
Uploaded By	View the name of the person who uploaded the file along with the date and time that the person uploaded the file.
Category and Subcategory	View the document category for the attachment. The category and subcategory are available when a document group is specified during setup for the transaction type or in the contractor license options. Note: This field is not available for case and business license attachments.

Page Element	Description
Actions	Click the actions icon to select and perform an action: ○ <i>View Details</i> ○ <i>Download</i> ○ <i>Delete</i> 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.

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 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 Fees and Payments

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

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

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

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

Viewing Fees and Payments for an Application

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

Page Element	Description
Fee Description	The description of the fee as defined when creating a fee item.
Amount	The amount due for each fee.
Currency	The currency in which the transaction is paid.
Status	○ <i>Canceled</i>: Indicates the fee payment is no longer required. ○ <i>Pending</i>: Indicates the fee is pending the agency's finalization. The fee may or may not become due. ○ <i>Hold</i>: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved. ○ <i>Due</i>: Indicates the current fee request is due and needs to be paid. ○ <i>Refund Pending</i>: Indicates that a refund was submitted for processing and approval. ○ <i>Refunded</i>: Indicates the fee was reversed and a refund was issued. ○ <i>Payment in Process</i>: Indicates that the fee payment was initiated but not yet resolved. Typically this status is temporary and resolved to <i>Paid</i> once the payment is recorded in the application.
Department	The department within the agency requiring the payment.
Assessed Date	The date the request for payment was issued.
Payment Date	The date payment was received and the payer.
Payment Reference	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
Invoice	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
Total Fees	The total amount of fees that may be applicable to the application.
Total Payable	The amount of fees that are designated as payable. The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.
Total Paid	The amount of the total fees already collected.

Page Element	Description
Balance Due	The remaining portion of the fees yet to be collected.
Pay	Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment. If you want to make a partial payment, deselect the <i>Select All</i> check box to clear the check boxes for all the fee items and then select individual items. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full. Note: The Pay button takes applicants directly to the Checkout page in payment services.

Adding Ad Hoc Fees

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

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

To manually add a fee:

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

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

6. Use the **Department** lookup list to select the department to collect the fee.

The department defaults from the fee item, if specified. Otherwise, the system uses the department from the application type setup.

7. Set the appropriate date for the fee using the **Assessed Date** field.
8. Use the **Memo** field to add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the application process.
9. Click **Save**.

Calculating Additional Fees

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

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

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

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

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

Adjusting Fees

Agency staff with appropriate permissions can correct or adjust fees as needed after the application is submitted. For example, if the applicant added 6 solar panels instead of 2, the required permit fees might increase. After you update the information that was submitted during intake in the application details, you can recalculate the total fees due based on the fee schedule for the application type. The recalculation corrects the fees by either generating a new fee or changing the amount.

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

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

The difference in fees compared to the original fee or the new fee appears as a separate line in the fee list. The fee totals for the application are also updated. If no adjustments are required, the displayed fees remain the same. If a fee item with a negative amount results from recalculating fees, you can process a refund to correct the overpayment.

Note: Fees are also recalculated when agency staff or applicants click the **Pay** button on the Transactions page or Applications page, respectively, or on the Fees and Payments page. Applicants will also see the adjusted fees on their Make a Payment page.

Paying Fees

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

Note: Registered public applicants are not allowed to make partial payments. These users must ask the agency to make a partial payment on their behalf. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.

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

Incomplete Payments

When a fee payment is initiated, Public Sector Compliance and Regulation (PSCR) gives it a status of *Payment in Process* which indicates that it needs to be resolved and no other payment requests can be made for the fee. If there is a network issue, PSCR tries to resolve the payment while the user is waiting for the payment to be processed. If the user navigates away from the checkout page or closes the browser before the payment is recorded in Public Sector Compliance and Regulation (PSCR), the fee status remains *Payment in Process*. When a user accesses the fee payment again through the Make a Payment page or Fees and Payments page, the application automatically tries to resolve the status to *Paid* or reset it to *Due*.

Refunding Fees

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

Here's how to refund permit fees:

1. Click the **Select Multiple** icon to display the row selector.
2. Select one or more fee items.

You can only select fees that have been paid or fees with system-generated negative amounts that are due.

3. Click **Initiate Refund**.
4. Review the fee amount and refund method. When processing a partial refund, you're overriding the default fee amount.
5. You must enter a refund reason before you submit the refund request.
6. Click **Process Refund** to reverse or partially reverse the fee.

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

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

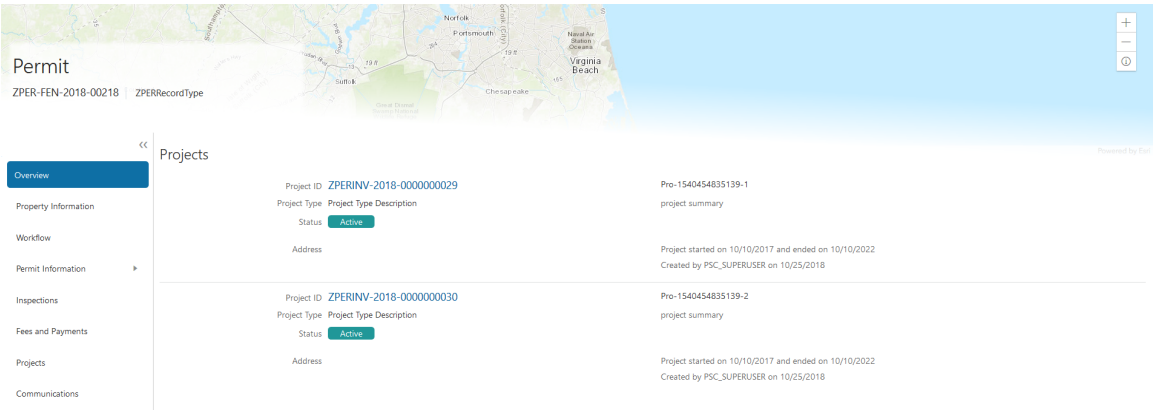
For more information about the refund approval process, see [Viewing and Processing Refunds](#).

Viewing Project Summaries

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

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

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



Viewing the Project Summary

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

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

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

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

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

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

Related Topics

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

Working with Application Communications

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

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

Sending Application Communications

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

Agency planners can send their application communication from the My Applications tab. Click the **Planner Worklist** tile on the Agency Springboard and then click the My Applications tab. You send an ad hoc message for an application by clicking the **Actions** menu and selecting **Send Message**.

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

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are: ○ <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. Note: The fields that are available to define on this page vary depending on the channel type and display format that you select.
Visibility	Select which type of user can see this message. All communications can be accessed by agency staff. Values are: ○ <i>Account owner</i> ○ <i>Agency staff only</i>
MIME Type (Multipurpose Internet Mail Extensions type)	Select the format of the message. Values are: ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. Note: This field does not appear for the <i>Text</i> channel type.
Priority	Turn this switch on to display the notification at the top of the notification list. Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists.

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

Page Elements	Definition
	Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.
Priority	Turn on this switch to display notifications generated by this communication template at the top of the notification list. Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.
User Can Delete	Turn on this switch to enable users to delete notifications generated by this communication template from their notification lists. Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.
Subject	Enter a brief description of the purpose and content of the message. Note: This field doesn't appear for the <i>Text</i> channel type.
Message Body	Enter the main body text of the message. For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> MIME type, you can enter only plain, unformatted text. For the <i>HTML</i> MIME type, you can enter rich text, links, and images.

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. Note that contacts can't access web forms or web form attachments.

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>	Enables the recipient to attach one file per question. 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.
<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 Application Communications

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

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

Select an application on the Transactions page.

Click Communications in the navigation bar.

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

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

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

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

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

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

Working with Ad Hoc Communications

Ad hoc communications enable agency staff to create and distribute emails, notifications, and texts as well as post banner alerts as needed. Agency staff can create and update ad hoc communications in the Communication Center.

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

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

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

System administrators can troubleshoot failed communications on the Error Logs tab in the Communication Center. For more information, see "Managing Communication Errors" in *Using the Communication Center*.

Adding Ad Hoc Alerts

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

Page Element	Description
Reference Name	Enter a unique name for the alert.

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

4. Click **Save**.

Modifying Ad Hoc Alerts

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

Deleting Ad Hoc Alerts

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

Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are: ○ <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 Notifications button in the header at the top of the page in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service. Note: The fields that are available to define on this page vary depending on the channel type that you select.
Visibility	Select which type of user can see this message. All communications can be seen by agency staff. Values are: ○ <i>Account owner</i> ○ <i>Agency staff only</i>
MIME Type (Multipurpose Internet Mail Extensions type)	Select the display format of the message. Values are: ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. Note: This field does not appear for the <i>Text</i> channel type.
Priority	Turn this switch on to display the notification at the top of the notification list.

Page Elements	Definition
	Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.
User Can Delete	Turn this switch on to enable users to delete this notification from their notification lists. Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.
Select and Insert	These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click Insert to enter a variable for that attribute. For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click Insert, the <code>\${Current Date}</code> variable appears in the Message Body field of the alert. When the application displays this alert, the current date is included in the body text. For more information, see Using Attributes in Communication Templates.
Reference	Enter a unique alphanumeric reference for the communication.
To	Enter a value for the target recipients of the message. For notifications, enter comma-separated user IDs for the registered users, for example, <code>SYSTEM_ADMIN,BUSINESS_ANALYST</code>. For emails, enter comma-separated email addresses for the recipients, for example, <code>john.doe@example.com</code>. Enter comma-separated phone numbers for text messages.
Cc and Bcc	Enter the email addresses of the people or organizations that you want to receive a copy or blind copy of the message. Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.
From	Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.

Page Elements	Definition
	For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service. Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.
Subject	Enter a brief description of the purpose and content of the message. Note: This field does not appear for the <i>Text</i> channel type.
Message Body	Enter the main body text of the message. For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> MIME type, you can enter only plain, unformatted text. For the <i>HTML</i> MIME type, you can enter rich text, links, and images.

4. Click **Send**.

Viewing Ad Hoc Emails, Notifications, and Texts

1. Select **Communication Center** on the Agency Springboard.
2. For each row on the **Emails, Notifications, and Texts** tab of the Communication Center page you can:

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

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

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

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

Viewing Application Status History

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

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

Reviewing the Status History

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

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

Related Topics

- [Setting Up Transaction Statuses](#)

Working with Related Transactions

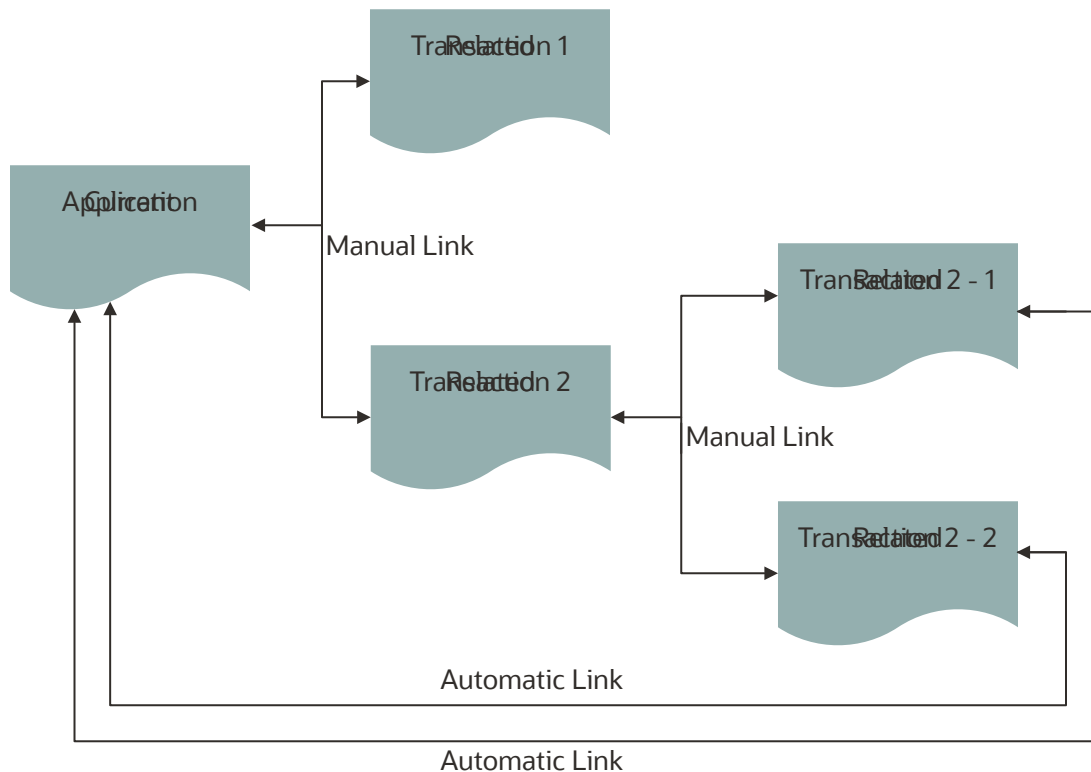
Applicants and agency users can link their consultation, business license, permit, or planning applications to other transactions using the Related Transactions page. Agency staff can establish links between transactions and code enforcement cases. Only agency staff such as a code technician have access 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. 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.
Status	View the status of the transaction or case and the date of update.
Description	View the description of the transaction.
Source	View the detail related to the linking of the transaction: ○ <i>Manual or Automatic</i> linking: 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.

5 Working with Planning Application Expiration

Expiration Overview

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

Expiration Rules

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

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

Business License Expiration Dates

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

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

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

Business License Consultation Expiration Dates

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

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

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

Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

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

- When the application expires.

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

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

- When the permit expires.

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

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

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

Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

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

- When the entitlement expires.

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

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

Pre-Application Expiration Dates

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.

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

- When the pre-application expires.

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

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

Processing Expiration Status

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

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

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

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

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

Working with Application Expiration

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

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

Viewing the Expiration Dates

Here's how you can view expiration dates:

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

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

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

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

Extending Expiration Dates

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

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

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

Related Topics

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

Updating Application Expiration Status

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

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

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

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

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

Entering Parameters to Process Expiration Rules

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

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ○ <i>Once</i>: Select to run the process one time only. ○ <i>Hourly or minute</i>: Select to run the process at regular time intervals. ○ <i>Daily</i>: Select to run the process at regular intervals in days. Note: <i>Daily</i> is the recommended option for running the expiration status update process. ○ <i>Weekly</i>: Select to run the process at regular intervals in weeks. ○ <i>Monthly</i>: Select to run the process on specific days of the month. ○ <i>Yearly</i>: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and Minutes	Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date. Note: These fields are available only if you select a process frequency of <i>Hours</i> or <i>Minutes</i>.
Days	Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.

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

Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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

Submitting the Process

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

6 Recording and Billing Time

Adding Time Entries

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

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

Accessing Time Entry

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

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

Inspection

CKELF-2020-00003
CK_SCHDINSP_ELE

CK-2020-00003
CKPERMITTYPE01

Details

Comments

Attachments

Time Recording

Time Recording

Add Time

Name	Category	Subcategory	Date	Hours	Minutes
Gautam Mahadeo	TRAVEL	TRAVEL_Flight	6/25/20	4	15
Gautam Mahadeo	MEETING	PlanReview_Meeting	6/25/20	2	46
Joe Green	TRAVEL	TRAVEL_Flight	6/25/20	4	45

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

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

Time Recording

Show All Statuses

Transaction	Source	Property	Transaction Status	Last Date Time Recorded	Total Hours	Total Minutes
CK-2020-00044 CKPERMITTYPE01	CKPNC-2020-00002 Inspection	10276, Brocks St. SAN FRANCISCO, California, 94105	Inspection			
CK-2020-00062 CKPERMITTYPE01	CKELE-2020-00010 Inspection	10276, Brocks St. SAN FRANCISCO, California, 94105	Inspection			
CK-2020-00045 CKPERMITTYPE01	CKELE-2020-00001 Inspection	10276, Brocks St. SAN FRANCISCO, California, 94105	Inspection	8/6/20	1	30

By default, this page displays transactions that aren't in a terminal status (Completed, Denied, Certificate of Occupancy, Void, or Withdrawn). For example, it won't display expired permit inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions assigned to you regardless of status.

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

Adding a Time Entry

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

This is an example of the Time Details page

Time Details

NameChanel Caudy

Time Type CodeINSP_BAO

CategoryTRAVEL

SubcategoryFlight

CommentsFlight time to inspection location.

Date8/6/20

Hours3

Minutes30

Billable

Cancel

Save

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

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

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

4. Click **Save**.

Modifying a Time Entry

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

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

Assessing Fees for Time Entries

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

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

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

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

Permit
CK-2020-00156 CKPERMITTYPE01
3904
Arlington, US-VA 22201

Time Recording

Recorded Time Unassessed Assessed

Assess Fees

Source	Name	Category	Subcategory	Date	Hours	Minutes	Billable	Total Fees
☒ Inspection CKPLU-2020-00019	Jacob Smith	TRAVEL	Flight	10/11/20	4	30	Yes	558.54 USD
☐ Inspection CKPLU-2020-00019	Peter Nelson	TRAVEL	Flight	10/11/20	8	25	Yes	1,044.69 USD

This page has three tabs:

- The Recorded Time tab displays all recorded time entries for the transaction.
- Note:** You can add time entries on this tab for planning applications.
- The Unassessed tab displays all time entries for which fees have not yet been assessed.
- The Assessed tab displays time entries for which fees have already been assessed.

Assessing Fees for Time Entries

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

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

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

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

Accessing Unassessed Time Fees from the Agency Springboard

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

This example shows the Unassessed Time Fees page

Unassessed Time Fees

Show All Statuses

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

By default, this page displays transactions with unassessed fees that aren't in terminal status (Completed, Denied, Certificate of Occupancy, Void, or Withdrawn). For example, it won't display permits with expired inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions with unassessed fees.

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

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

7 Managing Manual Plan Reviews

Manual Plan Review Process Flow

Some projects require a plan review to evaluate them.

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

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

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

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

Managing Manual Plan Review Cycles

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

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

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

To access the Plan Reviews page for a transaction:

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

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

Permit
ZPER-FEN-2020-00552 | PSCPRRevAutoAssign

Plan Reviews

Consolidated Plan Comments

Review Cycle 1 In Progress Open for 6 days

Review Name PSCPRRevAutoAssign
Opened by Green Prussian on 11/26/20 4:18 PM

Decision
Due Date

Record Time

Reviewers

The following departments are required and have not been added.

- AutoAssignDeptID1
- AutoAssignDeptID2
- AutoAssignDeptID3

Add Reviewers

Department	Reviewer	Due Date	Status	Decision	Decision Date	Override
AutoAssignDeptID1	Jonathan Powers		In Progress			No
AutoAssignDeptID2	NEO LOB		In Progress			No

Comments

There are no comments entered.

Add Comment

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

Manual Plan Review Cycle Workflow

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

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

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

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

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

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

Adding Manual Plan Review Cycles

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

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

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

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

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

If you want to add a due date for the plan review cycle, click **Edit** next to the **Due Date** field and select a due date.

Canceling Manual Plan Review Cycles

On the Plan Reviews page, click the **Cancel Review Cycle** button to cancel a plan review cycle that is active. This button is available only when the plan review cycle has a status of *In Progress*.

Canceling a cycle sets the review cycle status to *Canceled*. After canceling, the cycle and review details are read-only. All active tasks associated with the plan review are canceled when the plan review cycle is canceled.

Note: An active plan review cycle is canceled when the transaction that it is associated with is withdrawn.

Recording Time for Plan Reviews

Agency staff can use the Record Time section to record the time they spend on their plan reviews. For more information, see [Adding Time Entries](#).

Accessing Conditions of Approval for Planning Applications

Click the **Conditions of Approval** link on the Plan Review page to access the Conditions of Approval page for the planning application. This link is available only for planning applications. For more information on conditions of approval see [Working with Conditions of Approval](#).

Adding Reviewers to Manual Plan Reviews

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

If the transaction type associated with the transaction includes required plan review departments, those departments are displayed at the top of the Reviewers grid. Once a reviewer from a required department is added to the plan review cycle, that department no longer appears.

If **Enable Auto Assignment** is turned on for the transaction type, a reviewer row is automatically added to the plan review cycle for each required plan reviewer department selected for the transaction type. Additionally, the department lead for each department is automatically assigned as the reviewer. For more information, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

1. On the Plan Review page, click the **Add Reviewers** button.

The Add Reviewers modal page displays a list of available reviewers by plan reviewer department. For more information on plan reviewer departments, see [Setting Up Plan Reviewer Departments](#).

Reviewers are available in the list only when they have a transaction type job attribute that matches the transaction type of the transaction.

Additionally, if the parcel or address for the transaction is associated with a plan review district, only the reviewers that have the matching plan review district job attribute are initially available on the page. Turn on the **Show Reviewers for All Districts** switch to view all reviewers regardless of which plan review district is assigned to them. The **District** column displays which districts are assigned to each reviewer. The **Show Reviewers for All Districts** switch and the **District** column appear on the Add Reviewers modal page only if a plan review district is assigned to the transaction.

For more information on plan review districts, see [Setting Up District Types](#), [Setting Up Districts](#), [Assigning Districts to Parcels](#), and [Assigning Districts to Addresses](#).

For more information on assigning job attributes, see [Managing Agency Staff Profiles](#).

The **Count** column displays the number of plan reviews currently assigned to each reviewer. This enables a plan coordinator to consider a reviewer's workload when deciding whether to add them to a plan review.

2. Select the check box next to each reviewer that you want to add.
3. Click **Save**.

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

Note: If you're resubmitting a plan for review, you can elect to copy the original set of reviewers when you add a new plan review cycle. See [Managing Manual Plan Review Cycles](#).

Removing Reviewers from Manual Plan Reviews

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

In the Reviewers grid, click the **Delete** button for a reviewer. You can remove reviewers when:

- The plan review cycle is active.
- The reviewer's status is *In Progress*.
- You entered an override decision for a reviewer, but the reviewer did not enter comments or a decision before the override.

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

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

Viewing the Different Plan Review Cycles

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

1. Click the **Switch Cycle** link in the plan review header details.

This link is available only when there are two or more plan review cycles.

2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

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

Adding Comments for a Review Cycle

Plan coordinators can add comments at the review cycle level on the Plan Reviews page.

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

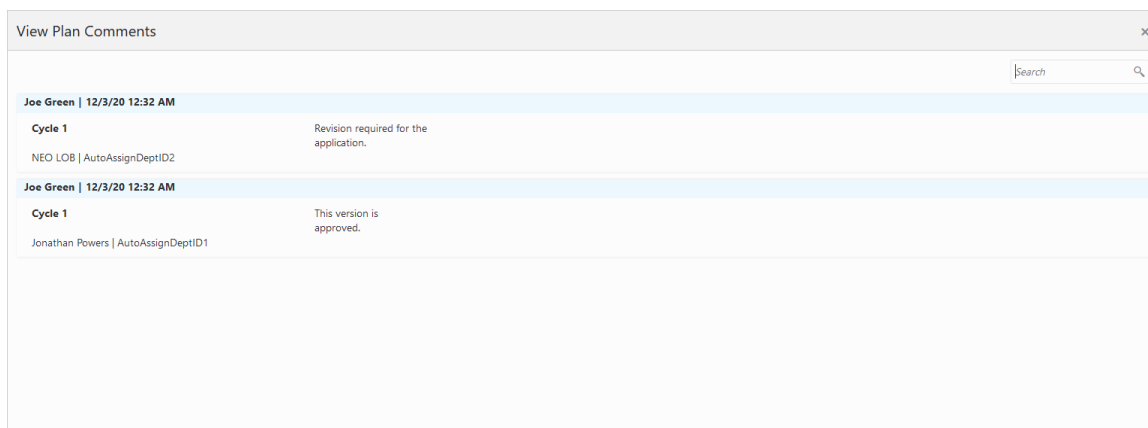
All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or permit is closed or canceled.

Viewing All Plan Review Comments

Plan coordinators, plan reviewers, and applicants can view all comments entered for all cycles of a plan review on the Plan Reviews page.

Click the **Consolidated Plan Comments** link.

This example shows the View Plan Comments page.



The screenshot shows a web interface titled "View Plan Comments" with a search bar in the top right. It displays two comment entries for "Cycle 1".

Joe Green 12/3/20 12:32 AM	
Cycle 1	Revision required for the application.
NEO LOB AutoAssignDeptID2	

Joe Green 12/3/20 12:32 AM	
Cycle 1	This version is approved.
Jonathan Powers AutoAssignDeptID1	

The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. The comments listed on this page are searchable and filterable.

Performing Manual Plan Reviews

Plan reviewers perform reviews of documents.

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

This example shows the Plan Reviewer Decision Details page.

Plan Review Decision Details

Reviewer Details

Assigned Date: 2/19/20 12:04 AM
Assigned By: Joe Green
Review Status: In Progress

Last Updated Date: 2/19/20 12:04 AM
Last Updated By: Joe Green
Due Date: 2/26/20

Reviewer Decision

Reviewer: Jonathan Powers
Decision: Approved
Decision Date:

Override Reviewer Decision

Override By:
Override Date:

Override Decision:

Comments

There are no comments entered.
Add Comment

Cancel Save

An agency's plan coordinator can also use this page to override a plan reviewer's decision.

The plan review functionality derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status.

Viewing Plan Reviews Assigned to You

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

1. Select **My Plan Reviews** on the Agency Springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Reviewer Decision Details page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.

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

Note: Both manual and electronic plan reviews that are assigned to you appear on this page. For more information on electronic plan reviews, see [Performing Electronic Plan Reviews](#).

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

For more information on the Task Management page, see [Managing Tasks](#).

Adding a Manual Plan Review Decision

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

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

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the **Reviewers** grid, click the **View More Details** button for your row.
5. On the Plan Reviewer Decision Details page, select a value from the **Decision** list.

You can select from these system-defined decision statuses:

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

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

6. Click **Add Comments** to enter comments for your review.

You can't edit comments once the plan review cycle or transaction is closed or canceled.

7. Click the **Save** button.

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

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

Overriding Plan Reviewer Decisions

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

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

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the **Reviewers** grid, click the **View More Details** button for the selected plan reviewer.
5. On the Plan Reviewer Decision Details page, select a value from the **Override Decision** list.

You can select from these decisions:

- *Approved*

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

6. Click the **Save** button.

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

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

8 Managing Electronic Plan Reviews

Electronic Plan Review Process Flow

Some projects require a plan review to evaluate them.

Electronic plan reviews are tracked as part of permitting and planning application workflow, and are performed through an integration with Bluebeam™, a collaborative electronic document review tool.

Note: To enable the Bluebeam™ integration contact Oracle Support.

Electronic plan reviews are created for transactions when the **Plan Review Type** is set to *Electronic* for the associated transaction type. For more information see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Note: Manual plan reviews do not include document review or integration with Bluebeam™. For more information on manual plan reviews, see [Managing Manual Plan Review Cycles](#).

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

1. A registered public user submits a permit or planning application with attached documents that require review by agency staff.
2. A permit technician or assigned planner assigns a status to the transaction that requires a plan review. For more information, see [Using Workflow](#).
3. The plan coordinator adds a plan review cycle for the transaction, which creates a Bluebeam Studio™ Session. See [Managing Electronic Plan Review Cycles](#).
4. The plan coordinator adds documents to the plan review cycle and assigns reviewers to the documents. See [Managing Electronic Plan Review Cycles](#).
5. The assigned plan reviewers complete their review. See [Performing Electronic Plan Reviews](#).
6. The plan coordinator finalizes the plan review cycle. See [Managing Electronic Plan Review Cycles](#).
7. Repeat steps 3 through 6 for additional plan review cycles as necessary until the review is complete.

Managing Electronic Plan Review Cycles

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

Your agency conducts electronic document reviews in Bluebeam Studio™ Sessions.

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

- Add plan review cycles.
- Cancel plan review cycles.
- Add and remove electronic documents.
- Add and remove plan reviewers.
- View the different plan review cycles.

- Add comments for a review cycle.
- View all plan review comments.
- Finalize plan review cycles.

To access the Plan Reviews page for a transaction:

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

This example shows the Plan Reviews page for an electronic review.

The screenshot shows the 'Plan Reviews' page for a specific permit (EZE-201201-00167). The page is divided into a sidebar and a main content area. The sidebar contains navigation links: Overview, Property Information, Workflow, Permit Information (selected), Application Details, Plan Reviews (active), Contractor, Contacts, Conditions, Attachments, Comments, and Inspections. The main content area shows 'Review Cycle 1' with a status of 'Completed' and a due date of 'Open for 0 days'. It also displays a table of documents and a section for comments.

File Name	Description	Status	State	Date
FencingPermit-Cycle1.pdf		Completed	Marked up	12/1/20 2:03 PM
FencingPermit.pdf	Fencing Permit for Approval	Completed	Approved	12/1/20 1:58 PM

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

Electronic Plan Review Cycle Workflow

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

An electronic plan review cycle is automatically completed when all reviewers have provided a decision status for all of the documents added to the electronic document review session.

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

Workflow is automatically moved forward to the next step when all of the following criteria are met:

- The current plan review cycle status is *Complete*.
- The plan review decision is *Approved*, *Approved with Comments*, or *Not Required*.
- The review cycle has been finalized.

The workflow process definition needs to identify the plan review task and the action to take when auto-advancing. For more information, see *Using Custom Properties*

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

Note: Once the plan review cycle is complete, the plan coordinator finalizes the review cycle to download the reviewed electronic documents and close the Bluebeam™ Studio Session.

Electronic Plan Review Communications

The following communication events enable you to generate notifications for plan reviews.

Note: These events are registered with the Business Rules Framework. For more information, see [Setting Up Send Communication Actions](#).

Event Name	Communication Description
Plan Review Completed or Canceled	Generates a notification when an electronic plan review is canceled. This event is also triggered when the permit associated with a plan review expires or is withdrawn. This event is also triggered when the transaction associated with a plan review expires or is withdrawn. Note: This event generates a notification when a manual review is completed or canceled. For more information on manual plan reviews, see Managing Manual Plan Review Cycles.
Plan Review Finalized	Generates a notification when a plan review is finalized.
Plan Review Ready To Finalize	Generates a notification when a plan review is ready to be finalized.

You must configure templates to define the content of the generated notifications and determine who receives them. For more information on configuring communication event templates, see [Setting Up Communication Templates](#).

Adding Electronic Plan Review Cycles

Before assigning electronic documents and reviewers, you add plan review cycles for a transaction on the Plan Review page.

1. Click the **Add Review Cycle** button.

This button is available only when:

- You're adding the first plan review cycle for a transaction.
 - All other plan review cycles for the transaction are finalized or canceled.
2. For the initial plan review cycle, the default review cycle name is the transaction type value, but you can enter a different cycle name on the Add Review Cycle page.
 3. Click the **Add** button to add a review cycle and create a Bluebeam Studio™ Session for it. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

Note: If an error occurs while creating the Bluebeam Studio™ Session, a **Create Session** button appears next to the Add Cycle button. Click it to retry creating the Bluebeam Studio™ Session. You can't add documents or reviewers to a review cycle until you successfully create a Bluebeam Studio™ Session.

After the Studio Session is created, the **View Session** link appears on the Plan Review page.

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

Canceling Electronic Plan Review Cycles

On the Plan Reviews page, click the **Cancel Review Cycle** button to cancel a plan review cycle that is active. This button is available only when the plan review cycle has a status of *In Progress*.

Canceling a cycle sets the review cycle status to *Canceled*. After canceling, the cycle and review details are read-only. All active tasks associated with the plan review are canceled when the plan review cycle is canceled.

Note: An active plan review cycle is canceled when the transaction that it is associated with is withdrawn.

Recording Time for Plan Reviews

Agency staff can use the Record Time section to record the time they spend on their plan reviews. For more information, see [Adding Time Entries](#).

Adding Documents to Electronic Plan Reviews

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

1. Click the **Add Documents** button in the Documents grid.
2. On the Add Documents modal page, select the check box next to the documents you want to add to the review. Only documents in PDF format that are added as attachments for the transaction are available to select. For more information on attachments, see [Working with Attachments](#).

Note: Documents that have been added to the plan review do not appear in the Add Documents modal page.

3. Click **Save** to add the documents to the review cycle and upload them to the Bluebeam Studio™ Session. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

When the Documents grid refreshes, you'll see the documents to be reviewed with an *In Progress* status. Documents added to a review for the first time have a state of *Initial*. New versions of a document that have been reviewed in a previous cycle have a state of *Resubmitted*.

Reviewed versions of the documents from the previous cycle also appear in the grid, but they have a status of *Completed* and a state of *Marked up*. You can't add reviewers for these complete, marked up documents.

Note: If an error occurs while uploading a document to the Bluebeam Studio™ Session, a **Retry** button appears in the Documents grid. Click it to upload the documents in the grid that failed to upload when they were added.

Removing Documents from Electronic Plan Reviews

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

1. In the Documents grid, click the **Delete** button for a document.

You can delete documents when:

- The plan review cycle is active.
- The document's status is *In Progress*.
- No reviewers have been added to the document.

2. Click **OK** to confirm the deletion and remove the file from the Bluebeam Studio™ Session.

Accessing Conditions of Approval for Planning Applications

Click the **Conditions of Approval** link on the Plan Review page to access the Conditions of Approval page for the planning application. This link is available only for planning applications. For more information on conditions of approval see *Working with Conditions of Approval*.

Adding Reviewers to Electronic Plan Reviews

As a plan coordinator, after adding electronic documents to a plan review, you add reviewers for each document on the Reviewers page.

If the permit type associated with the permit includes required plan review departments, those departments are displayed at the top of the Documents grid. Once a reviewer from a required department is added to the plan review cycle, that department no longer appears.

1. Expand a document row to view its reviewer information.
2. Click the **Add Reviewers** button.

The Add Reviewers modal page displays a list of available reviewers by plan reviewer department. For more information on plan reviewer departments, see *Setting Up Plan Reviewer Departments*.

Reviewers are available in the list only when they have a transaction type job attribute that matches the transaction type of the transaction.

Additionally, if the parcel or address for the transaction is associated with a plan review district, only the reviewers that have the matching plan review district job attribute are initially available on the page. Turn on the **Show Reviewers for All Districts** switch to view all reviewers regardless of which plan review district is assigned to them. The **District** column displays which districts are assigned to each reviewer. The **Show Reviewers for All Districts** switch and the **District** column appear on the Add Reviewers modal page only if a plan review district is assigned to the transaction.

For more information on plan review districts, see *Setting Up District Types*, *Setting Up Districts*, *Assigning Districts to Parcels*, and *Assigning Districts to Addresses*.

For more information on assigning job attributes, see *Managing Agency Staff Profiles*.

The **Count** column displays the number of plan reviews currently assigned to each reviewer. This enables a plan coordinator to consider a reviewer's workload when deciding whether to add them to a plan review.

3. Select the check box next to each reviewer that you want to add.

4. Click **Save** to add the selected reviewers to the document in the Bluebeam Studio™ Session. You may be prompted to enter your login credentials to give Oracle access to your Bluebeam™ account.

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

Note: If an error occurs while uploading a document to the Bluebeam Studio™ Session, a **Retry** button appears next to the **Add Reviewer** button. Click it to add the reviewers in the grid that failed to add.

Note: If you're resubmitting a document for review, the reviewers assigned to the document during the last review cycle are automatically assigned to the resubmitted document when you add it to the new plan review cycle.

Accessing a Studio Session

You can access created Studio Sessions using from the Plan Review page.

Click the **View Session** link to access the Studio Session using an external Bluebeam™ application.

Viewing the Different Plan Review Cycles

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

1. Click the **Switch Cycle** link in the plan review header details.

This link is available only when there are two or more plan review cycles.

2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.

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

Adding Comments for a Review Cycle

Plan coordinators can add comments at the review cycle level on the Plan Reviews page.

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button. You can't edit comments once the plan review cycle or transaction is closed or canceled.

Viewing All Plan Review Comments

Plan coordinators, plan reviewers, and applicants can view all comments entered for all cycles of a plan review on the Plan Reviews page.

Click the **Consolidated Plan Comments** link.

This example shows the View Plan Comments page.

View Plan Comments ×

Joe Green | 12/3/20 12:32 AM

Cycle 1

NEO LOB | AutoAssignDeptID2

Revision required for the application.

Joe Green | 12/3/20 12:32 AM

Cycle 1

Jonathan Powers | AutoAssignDeptID1

This version is approved.

The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. The comments listed on this page are searchable and filterable.

Finalizing a Plan Review Cycle

Click the **Finalize Review Cycle** button to finalize the plan review cycle. This process closes the Studio Session and downloads the marked up documents with *CycleX* appended to the file name where *X* is the number of the review cycle. These downloaded files are added to the list of documents for the plan review cycle and the list of attachments for the transactions. Reviewers can compare these marked up documents to new versions of the document in subsequent review cycles. To perform actions on these downloaded files outside of the plan review process, use the Attachments page. See [Working with Attachments](#).

If any of the documents for the review cycle have a **Decision** of *Rejected* or *Revision Required*, the Finalize Review Cycle process automatically adds a new review cycle that includes the marked up documents in the Documents grid.

Note: The **Finalize Review Cycle** button is available only when the status is *Completed* for all documents added to the plan review cycle.

The Finalize Review Cycle process includes many different steps. The following table provides resolutions to errors that might occur during these steps.

Finalization Error	Resolution
Document Download	Click Finalize Review Cycle to retry finalizing from the point of error.
Close Session	Click Finalize Review Cycle to retry closing the Bluebeam Studio™ Session.
Create Cycle	Click Add Review Cycle to retry creating the next review cycle and Bluebeam Studio™ Session, and uploading the marked up documents from the previous review cycle.
Create Session	Click Create Session to retry creating the Bluebeam Studio™ Session and uploading the marked up documents from the previous review cycle.
Upload Marked Up Documents	Click Retry to retry uploading the marked up documents from the previous review cycle.
Unrecoverable Error	Click Cancel Review Cycle to cancel the review cycle.

Finalization Error	Resolution

Performing Electronic Plan Reviews

Plan reviewers perform reviews of documents.

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

This example shows the Plan Reviewer Decision Details page.

Plan Review Decision Details

Reviewer Details

Assigned Date: 2/19/20 12:04 AM

Assigned By: Joe Green

Review Status: In Progress

Last Updated Date: 2/19/20 12:04 AM

Last Updated By: Joe Green

Due Date: 2/26/20

Reviewer Decision

Reviewer: Jonathan Powers

Decision: Approved

Decision Date:

Override Reviewer Decision

Override By:

Override Decision:

Override Date:

Comments

There are no comments entered.

Add Comment

Cancel

Save

An agency’s plan coordinator can also use this page to override a plan reviewer’s decision.

The plan review functionality derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status.

Viewing Plan Reviews Assigned to You

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

1. Select **My Plan Reviews** on the Agency Springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Reviewer Decision Details page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.

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

Note: Both manual and electronic plan reviews that are assigned to you appear on this page. For more information on manual plan reviews, see *Performing Manual Plan Reviews*.

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

For more information on the Task Management page, see *Managing Tasks*.

Adding an Electronic Plan Review Decision

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

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

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the Documents grid, expand the row for the document you want to review.
5. Click the **View More Details** button for your row.
6. On the Plan Reviewer Decision Details page, select a value from the **Decision** list.

You can select from these system-defined decision statuses:

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

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

7. Click **Add Comments** to enter comments for your review.

You can't edit comments once the plan review cycle or permit is closed or canceled.

8. Click the **Save** button.

The system displays the selected decision in the **Decision** field and populates the **Decision Date** field with a timestamp. In addition, once all reviewers have entered a decision for a document, the system updates the **State** field for the document with the most severe decision status selected by the reviewers.

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

Overriding Plan Reviewer Decisions

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

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

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select a transaction record with a status of *Plan Review*.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the Documents grid, expand the row for the document you want to review.
5. Click the **View More Details** button for the row you want to override.
6. On the Plan Reviewer Decision Details page, select a value from the **Override Decision** list.

You can select from these decisions:

- *Approved*
 - *Approved with Comments*
 - *Revision Required*
 - *Rejected*
 - *Not Required*
7. Click the **Save** button.

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

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

9 Managing Projects

Using Projects

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

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

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

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

This example illustrates the Projects page:

Projects

Project	Summary	Contact	Status	Start Date	End Date
Pro-2018-00522 AAA-2018	AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the-art equipment, allowing new offices to just plug and play their systems.	SIMMONS Robert +1 (751) 852-9632	Completed	10-21-15	>
Pro-2018-04462 Pro2469	Connuure Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.	Robert M Jacob +1 (751) 852-9562	On Hold	10-04-17	11-20-19 >
PROI-OCT2018-4 John Tumac	Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops.	ALBERT MICHAEL SIMMONS +1 (951) 852-9632	Inactive	09-05-17	11-01-19 >

Page 1 of 3 (1-3 of 18 items) 1 2 3 > X Show Default

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

- Manage project activity
 - Create new or update existing project details
 - Assign or unassign transactions
 - Add and maintain project attachments
 - Visualize transactional data
 - Add and maintain project contacts
 - Access comprehensive project record details
- You can access the Projects page by clicking the **Project List** tile on the Agency Springboard, or by clicking **Projects > Project List** in the navigation bar.

Using the Projects Page

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

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

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

Adding a New Project

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

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

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

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

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

Assigning Transactions to a Project

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

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

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

Unassigning Transactions from a Project

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

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

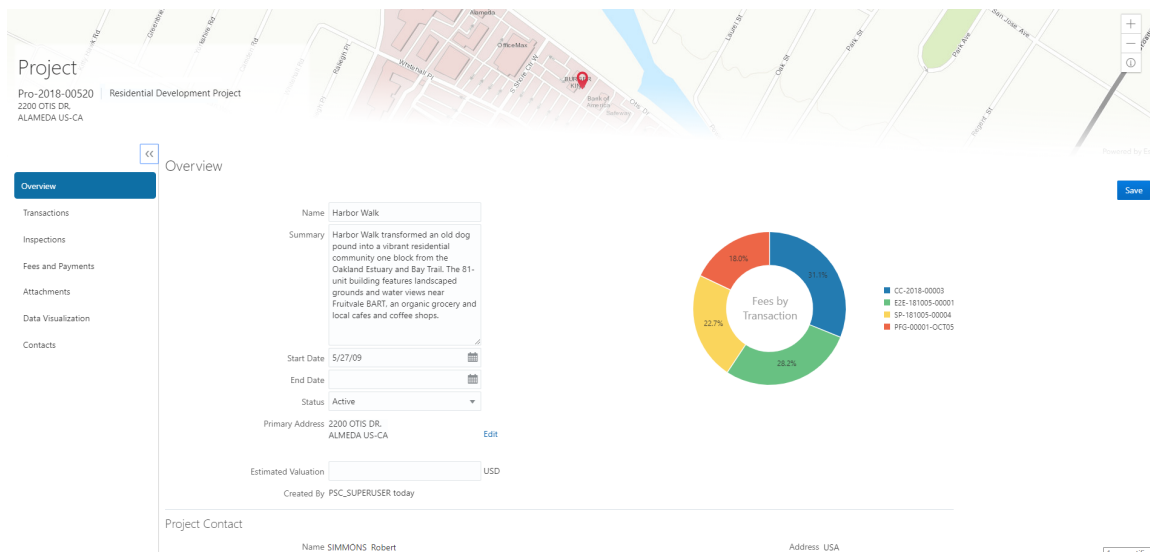
Viewing and Updating Project Details

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

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

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

This example illustrates the Project Details page:



Using the Overview Page

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

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

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

The fields in this section are displayed if there is at least one assignment (permit, planning application, or pre-application) for the project. You cannot edit the values for these fields on this page.

5. Click **Save** to save your changes, if any.

Using the Transactions Page

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

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

Using the Inspections Page

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

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

Using the Fees and Payments Page

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

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

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

Using the Attachments Page

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

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

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

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

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

Adding Project Attachments

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

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

Downloading Project Attachments

You download a document on the Attachments page.

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

Deleting Project Attachments

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

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

Using the Data Visualization Page

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

Using the Contacts Page

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

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

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:
 - *Add a contact from registered contacts:* You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.

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

The primary contact that was selected at the time of creating the project will longer be a primary contact.

- *Add a brand new contact manually:* You create a new contact by entering all the contact details and then include in the transaction.

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

Related Topics

- [Applying Conditions to Applications](#)

10 Tracking Planning Application Activities

Overview of Activity Tracking for Planning Applications

As planning department staff, you use activity tracking to help work through a list of time-sensitive tasks that affect the progress of a planning application.

The activities are driven by local ordinance, state law, and an agency's internal process, and the activity tracking provides a way to monitor the application. Taken together, the activities form a to-do list of tasks with calculated due dates and the flexibility to make updates when needed. Activities are displayed on the Activity Tracking page in the planning application details. You can also view activities on the Planner Worklist. For more information about using the worklist, see [Using the Planner Worklist](#).

The activities for a planning application are configured by your agency based on events or dates in the application timeline, including when the application is submitted, when the application is accepted, the hearing date, and the hearing decision date. The activities show up in the activity tracking for the planning application when one of the key events or dates occurs. For more information about configuring activities, see [Defining Planning Application Activity Rules](#).

Before you can use activity tracking, the agency sets up a list of activities and maps the group to a planning application type. Whenever you create an application with that planning application type, the associated activity list is used.

The activity due dates can occur prior to or after an event. For example, when the planner schedules a hearing, the activities associated with the hearing date appear in the activity tracking list. You'll see automatically generated due dates based on the activity rules set up by your agency and ensure that all of the deliverables are complete before or after the hearing.

Viewing the Activity Tracking Page

For each activity, the following information appears in the tracking list. Navigate to the Activity Tracking page by accessing the planning application, then select **Activity Tracking** under the **Planning Application** menu in the left panel on the page. The activity tracking tab is only available if the planning application is associated with an activity group.

Page Element	Description
Activity	Displays the name of the activity or task. This field is read-only and can't be updated. If the task is overdue, you'll see an overdue notice.
Base Date	Displays one of four milestone dates triggered by an event. The base date is the reference date for calculating the activity due date. - Received date - The application was received by agency staff. The activity appears on the tracking page when the application is submitted in the system or the received date is updated, depending on the activity rule. - Acceptance date - The agency staff accepts the application in their worklist. This date is automatically updated through workflow.

Page Element	Description
	- Hearing date - The agency staff schedules or reschedules a public hearing for the planning application. - Hearing Decision date - The hearing body makes a decision and agency staff enters the decision in the system. When these events occur, the activity is added to the tracking list. These dates can change and the due dates may be recalculated depending on the activity rules and the status of the activity.
Due Date	Displays the date the activity or task is due. This date is calculated using the base date and the activity rule for number of days due before or after the base date. This field can be manually updated.
Status	Displays the status of the activity or task. This field can be manually updated
Show All Statuses	Turn on the Show All Statuses switch to view a complete list of activities in the tracking table. The default view shows activities with an in progress or pending status. When you opt to show all statuses, you'll see history with other statuses, including complete or canceled activities.
Last Updated	Displays the date when the due date or status was last updated. This field can be manually updated.
Updated By	Displays the name of the user who last updated the due date or status. This field is automatically updated.
Comments	Click the Comments icon to view and add internal notes for each activity. The number of comments appears on the icon. The comments also show up on planning application items in the agency staff activity worklist.
Actions	Displays <i>Resubmit</i> when the activity with a Submission Date base date has an incomplete status. Agency staff can then create a new activity with a resubmitted date. This action appears only when the Allow Resubmission option is selected in the activity rules.

Related Topics

- [Setting Up Activity Tracking](#)
- [Working with Planning Application Activities](#)

Working with Planning Application Activities

Activity tracking helps you effectively manage important due dates for deliverables due during the planning application process. You can monitor activities when due dates are updated automatically and make manual updates to due dates and statuses to ensure the application progresses as required.

In some cases, activity due dates are updated automatically, such as when a received date is updated or a public hearing is rescheduled. As you work through the tracking list, you can also manually update the due date and the status of activities, and enter the date of the update. In general, you can't add activities, however depending on the setup, you

can create a new activity for a resubmitted application. If an application is canceled or withdrawn, all activities are canceled.

Viewing Automatically Updated Activities

The system automatically updates activity due dates depending on the type of base date, the current activity status, and the activity rules configured by the agency. This section provides details about the automatic updates that occur after different actions are taken, such as updating the received date for an application or rescheduling a public hearing.

Agency staff enter the date an application was received while filling out the intake form on behalf of an applicant. The activity based on the Received Date appears in the tracking table upon application submission. When agency staff updates the Received Date on the application details Overview page, the activity due date is automatically recalculated based on the new received date. However, the due date is recalculated only when the option to **Allow Resubmission** is set up for the activity.

Activities based on the hearing date appear in the tracking table when the hearing is scheduled. The agency can set up the activity rules to create a new activity or update an existing one when the public hearing is rescheduled or the hearing body is changed. The rule is active when the switch to **Redo Activity with New Base Date** is turned on. The system determines the updates based on the redo activity setting, the action, and the activity status.

The table here shows the automatic activity updates for different actions when the base date is the public hearing date.

Action	Current Activity Status	Redo Activity Setting	Automatic Tracking Update
Hearing is rescheduled.	Pending, In Progress, or Not Required	On	Recalculates the due date for the current activity based on the new hearing date and resets the status to Pending.
Hearing is rescheduled.	Pending, In Progress, or Not Required	Off	The due date stays as-is.
Hearing is rescheduled.	Completed	On	Creates a new activity with a new base date and due date. Sets the status to Pending. The completed activity stays as is.
Hearing is rescheduled.	Canceled	N/A	No changes are made to the base date or due date. The canceled activity stays as-is.
Hearing body is changed.	Any	N/A	Deletes all current activities with the old hearing body and creates all new activities with new hearing body. Sets the status to Pending.
Hearing is canceled.	Any except for Canceled	N/A	Cancels all activities.

Manually Updating Due Dates and Statuses

Although you can't manually delete or modify system-added activities and their base dates, you can manually update the activity due date, activity status, and the date the activity was last updated. If an activity isn't required, you can update the status to Not Required or Canceled.

Let's take a look at how to update these activity attributes for a planning application.

1. Go to the planning application.
2. Select **Planning Application** then **Activity Tracking** in the left navigation panel.
3. On the Activity Tracking list page, select the row of the activity you want to update.
4. You can update these fields:

Page Element	Description
Due Date	Enter the date that the deliverable is due or the deadline for the action that should be taken.
Activity Status	Select a status from the drop-down list. Your agency may provide statuses in addition to the statuses in the system.
Last Updated	Enter the date when you updated the activity.

5. Click **Save**.

Repeating an Activity for a Resubmitted Application

The Received Date activity that appears when the application is submitted can be repeated when the application is resubmitted. The **Allow Resubmission** switch must be turned on in the activity rule. Here's how to reset the activity due date with a pending status if the application is resubmitted.

1. On the Activity Tracking page, select the row of the activity based on the submission date.
2. Change the status to *Incomplete*. This status is only available if the **Allow Resubmission** switch is turned on in the activity setup.
3. Click **Save**.
4. Click the **Resubmit** link, which is only available when the status is *Incomplete*.
5. On the Resubmit page, the **Resubmitted Date** is automatically populated with the current date, and the **New Due Date** is calculated using the existing activity rule. You can change the **Resubmitted Date** and the due date will be recalculated. You can also override the due date.
6. Click **Save**.

The activity status resets to *Pending*.

11 Managing Property Information

Viewing Transactions Associated with a Parcel

View summary information of all transactions associated with a parcel.

Agency staff can view a summary of transactions for Permits, Planning Applications, Business Licenses, Cases and Incidents, that are associated with a parcel.

You can navigate to the Transactions page, from the **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to view its transactions. On the Parcel page for the selected parcel, select the Transactions tab in the left panel. On the Transactions page, click the transaction tab you wish to view for the parcel.

Page Element	Description	Additional Information
Permits and Planning Applications	View application data and statuses for permits and planning applications using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>
Business Licenses	View summary information about specific activities related to a business licenses such as consultations and license origination.	<i>Managing Business License Transactions</i>
Cases	Agency staff can view a summary of cases that are associated with a parcel on the Transactions page, Cases tab.	<i>Viewing Cases Associated with a Parcel</i>
Incidents	Agency staff can view a summary of incidents that are associated with a parcel on the Transactions page, Incidents tab.	<i>Viewing Incidents Associated with a Parcel</i>

Viewing Cases Associated with a Parcel

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

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its transactions.
3. On the Parcel page for the chosen parcel, select the Transactions tab in the left panel.
4. On the Transactions page, click the Cases tab.
5. Here are some of the information on the case transactions page for a parcel.

Page Element	Description
Case	This column displays:

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

Viewing Incidents Associated with a Parcel

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

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its transactions.
3. On the Parcel page for the chosen parcel, select the Transactions tab in the left panel.
4. On the Transactions page, click the Incidents tab.
5. Here are some of the information on the incident transactions page for a parcel.

Page Element	Description
Issue ID	This column displays: ○ The incident ID that is assigned based on the agency's autonumbering rules. ○ The incident type and subtype, separated by a hyphen. ○ The incident status. Unclaimed incidents have a status of Reported. ○ 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.
Description	Displays the incident description.
Assigned	Displays the name of the technician or code officer to whom the incident is assigned.

Working with Property Attachments

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

Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. On the Attachments page, view the list of property attachments, including this information:

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

Adding Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. Click **Add**.
5. Select the file to upload in the browser dialog box and click **Open**.
The filename appears on the Add Attachments page.
6. On the Add Attachments page, enter a description of the file, a document category, and a document subcategory.

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

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

7. Click the **Upload** button.

Deleting Property Attachments

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

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

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

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

Applying Conditions to Parcels and Addresses

Agency staff can apply conditions to parcels and addresses so that users interacting with a property are notified of any issues with it.

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

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

Applying a Condition to a Parcel or Address

1. Click **Parcel** or **Property Address** on the agency springboard.

Select a property.

Click **Conditions** in the left panel.

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

Page Element	Description
Condition Name	Use the lookup prompt to search and select the condition that you want to apply. The search page lists all the available conditions along with their severity, display message, and description. After you select a condition, the condition information is brought in as it was defined in the condition setup. You can override the default rules, priority, description, and additional information to customize the condition. For more information on conditions, see Setting Up Conditions.
Display Message	Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and cannot be updated here.
Severity  Lock  Hold  Notice	Displays the level of severity defined for the selected condition. ○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition. ○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition. ○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Apply Condition to Transactions	Applies the condition to new transactions that will be associated with the selected address or parcel. You turn off the switch if you want the condition to be applied only to the transaction you're working with. The condition setup determines whether this switch is turned off or on by default. For more information on setup and condition rules, see Setting Up Conditions.
Include in-process transactions	Turn on this switch if you want to apply the condition to the in-process transactions related to the parcel or address. This option appears only if the Apply Condition to Transactions switch is turned on. You can click the View Impacted Transactions link to view the list of transactions where the condition will be applied.
Condition Rules	Select one or more rules from: ○ Prevent Application Progress ○ Prevent Workflow Advancement ○ Prevent Issue or Final

Page Element	Description
	○ Prevent Payment ○ Prevent Inspection Schedule (applicable only to permits) ○ Prevent Inspection Result (applicable only to permits) ○ Prevent Final Inspection (applicable only to permits) Condition rules are available for selection based on: ○ <i>Condition setup</i>: If the Apply Condition to Transactions switch is turned off, then only the Prevent Application Progress rule is available for selection. ○ <i>Condition severity</i>: For a condition with a Hold severity, you can accept the default rules or select different rules. For a condition with a Lock severity, all condition rules are automatically applied and can't be changed. See Setting Up Conditions.
Priority	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
Description	Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.
Additional Information	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.

4. Click **Save**.

Resolving a Condition

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

1. Click **Parcel** or **Property Address** on the agency springboard.

Select a property.

Click **Conditions** in the left panel.

2. Click **Resolve** for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created.

You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.

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

Modifying a Condition

You can modify a condition that you applied to a parcel or property address. Any changes you make won't be copied over to the related transaction condition.

1. Click **Parcel** or **Property Address** on the Agency Springboard.

Select a property.

Click Conditions in the navigation bar.

2. Click the View More Details button for the condition you want to modify.
3. On the Condition Details page you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

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

4. Click **Save**.

CAUTION: Once a condition is saved, you can't make changes to the **Apply Condition to Transactions** and **Include in-process transactions** fields.

Viewing a Resolved Condition

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

1. Click **Parcel** or **Property Address** on the Agency Springboard.
2. Select a property.
3. Click **Conditions** in the navigation bar.
4. Select a row with a status of **Resolved** and click **View More Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
 - Resolve condition applied to transactions
 - Resolution Action
 - Resolved By
 - Resolved Date
6. Click **Cancel** to return to the Conditions page.

Related Topics

- [Working with Conditions](#)

Working with Parcel Genealogy Transactions

Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management.

Agency staff can create Parcel Genealogy transactions to manage parcel splits, merges and lot line adjustments. You can use the step-by-step guide to select a genealogy transaction type and establish parent and child parcels. You can also manage attributes, such as addresses, owners, size and districts. Once a parcel genealogy transaction is established, you can view the relationship in the Genealogy tab within the Parcel page.

Splitting Parcels

To split parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Split** and then click **Add Transaction**.
3. On the Split page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select parcels from the list, which have to be split.
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

Merging Parcels

To merge parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Merge** and then click **Add Transaction**.
3. On the Merge page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select the parent parcels to be merged from the list.

Steps	Description
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes, such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

4. Click **Submit**.

Making Lot Line Adjustments

To make lot line adjustments:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Adjust** and then click **Add Transaction**.
3. On the Adjust page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parcels	You can select parcels from the list to make adjustments.
Step 2: Manage Parcel Size	Adjust the parcel sizes.
Step 3: Review	You can review the details of the adjustment made. Validation errors, if any, are displayed at the top of this page.

4. Click Submit.

Viewing Parcel Genealogy Transactions

To view parcel genealogy transactions:

1. Select the Parcel tile on the Agency Springboard.
2. From the Parcel page, click a parcel row.

3. Select the Genealogy tab in the left panel. You can view the details of all the genealogy transactions this parcel has been through. The red star identifies the parcel which is currently being viewed. Click any parent or child parcel link to open the corresponding Parcel Details page in a new window.

Reconciling Provisional Parcels

Agency staff can now easily reconcile provisional parcels by replacing the temporary parcel identification numbers with a new one. Once reconciled, a cross-reference is established to retain history.

New parcels with the provisional status can be created on the Parcel page or as a result of genealogy transactions. The agency uses the provisional parcel numbers to associate transactions to those parcels while waiting for the assessor's parcel numbers (APNs) from the county. Once APNs are imported, agency staff can search for matched or unmatched parcels in the provisional status and reconcile them with their matching APNs. After the provisional parcels are reconciled, a cross-reference is established to retain history.

Note: The batch process to match provisional parcels should be run prior to performing parcel reconciliation to ensure all provisional parcels have been matched to their associated imported APNs. The BI Catalog report, Transactions with Reconciled Provisional Parcels, lists the parcel reconciliation transactions with respect to permits. Using this report you can see the provisional parcels that have been replaced with final parcels as a result of parcel reconciliation. For more information, see [Public Sector Compliance and Regulation Analytics](#).

To reconcile matched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, select the Matched Parcels tab, to view the following fields:

Page Element	Description
Parcel	Lists the provisional parcels with any potential matching APNs. Matching APNs are parcels with the same street number and street name.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The address of the primary parcel owner.
City	The city of the primary parcel owner.
Owner	The name of the primary parcel owner.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.

Page Element	Description
Reconcile Parcels button	Select the provisional parcel and the matching APN, and then click the Reconcile button to match the provisional parcel with the matching APN and retire the provisional parcel.

- Click the **Find Matching APN** button on a parcel row to open the **Find Matching Parcel** modal which lists a matching APN.
- In the Find Matching Parcel modal, view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the matched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
Parcel	The APNs of the parcels that resulted from the search.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Select the check box for the matching APN and click the **Reconcile** button.

After reconciliation, the provisional and matched APNs move to the Reconciled Parcels tab, from where you can see the history of the reconciled parcels.

To reconcile unmatched provisional parcels:

- Select the Parcel Reconciliation tile on the Agency Springboard.
- On the Provisional Parcel Reconciliation page, click the Unmatched Parcels tab, to view the following fields:

Page Element	Description
Search	You can search for a provisional parcel using its primary address.

Page Element	Description
Provisional Number	The temporary parcel number assigned to newly created provisional parcels.
Creation Date	The date on which the provisional parcel was created.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The address of the primary parcel owner.
Owner	The name of the primary parcel owner.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Click the **Find Matching APN** button on an unmatched parcel row to search for a matching APN.
- In the Find Matching Parcel modal, view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
Parcel	The APNs of the parcels that resulted from the search.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.

Page Element	Description
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

5. Select the check box for the matching APN and click the **Reconcile** button.

Viewing Reconciliation History

In the Reconciliation History page, you can view the details of the provisional parcels reconciled with their APNs. You can also use this page to undo a reconciliation.

To view reconciliation history:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. Click the Reconciliation History tab to view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appears filtered to list only those matching the search criteria.
Provisional Number	View the provisional number of the parcel. Click the link to view the details of the parcel in a new window.
APN	View the APN of the parcel. Click the link to view the details of the parcel in a new window.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.
Reconciled By	The user id of the person who reconciled the parcels.
Date Reconciled	The date on which the provisional parcel was reconciled with its APN.

Page Element	Description
Undo Reconciliation button	To disassociate parcels which were incorrectly reconciled.

Undoing a Reconciliation

To undo a reconciliation:

1. Select Parcel Reconciliation on the Agency Springboard.
2. Click the **Reconciliation History** tab.
3. Click the **Undo Reconciliation** button and confirm to revert the reconciliation.

12 Managing Contractor Information

Contractor License Overview

Permit and planning applications can include information about the contractors who perform the work. Agency contractor records help you validate whether contractors have licenses that are active and in good standing.

Contractor Licenses

Contractor information is stored and maintained in your main contractor records, where agency staff manually adds or loads licenses from an external source. Additionally, when agencies don't limit license selection to their list of contractor records and also integrate with an external licensing body, applicants can supply contractor information in permit and planning applications. If an application includes a license number that doesn't yet exist in your main records, submitting the application creates a new contractor record.

If you implement contractor integration, you can validate license information against your state or other external licensing body using the integration capabilities of Oracle Autonomous Integration Cloud (OIC).

Regardless of whether you integrate with an external licensing body, your contractor records include the same type of information. However, integration affects how you view and manage certain information. The following table describes how you manage information using only contractor records maintained by the agency or using an integration to validate and add licenses to your contractor records.

Information Type	Contractor List Only	Contractor List and External Source
All	Note: The agency limits the contractor selection to the agency-maintained contractor list. The agency allows applicants to select contractor licenses from the agency-maintained contractor records list only. In this case, applicants can enter or look up licenses from the contractor records only and not from the external licensing body. Agency staff with appropriate permissions manually enter or update license information in the contractor list. Contractor records can also be loaded from an external source, but license selection in the application is still limited to licenses in the list. Applicants who are contractors or their authorized agents can enter or look up their license to retrieve information from the contractor list, but can't manually enter their license information. Applicants who are not contractors or authorized agents, such as homeowners, can optionally enter or look up licenses to retrieve	Note: The agency doesn't limit the contractor selection to the agency's contractor list. The agency allows applicants to select contractor licenses from the contractor records list or an integrated external source. The validation process checks your contractor records first, and if you don't yet have a record of the license, the process retrieves information from the licensing body. Agency staff perform a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and re-validation is the only way to update the information. However, system administrators are able to modify contractor information. Applicants who enter a license number in an application can use the same validation process. Applicants who self-identify as contractors or the contractor's authorized agents must supply at least one license number. They can

Information Type	Contractor List Only	Contractor List and External Source
	information from the contractor records about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant. License information can be retrieved by looking up the license number, business name, or owner name.	retrieve license details because an integration is available but can't manually enter data other than the license number. Other applicants aren't expected to know the license number. They can enter license numbers to retrieve license details from the licensing body, but they can also leave the license number blank. They can't manually enter or update data.
License status	Agency staff uses the <i>Status</i> field to indicate if a license is active, suspended, expired, and so forth. Note: The license status is independent of contractor approval. For example, a license can have an active status but is disabled for use because it isn't approved. Licenses must be enabled to be entered in an application. Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.	The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by re-validating the license number. Your status mapping settings assign a default agency status based on the source status. Agency staff can update the internal status. Your status mapping settings also specify if specific source statuses will prevent applicants from submitting applications. If the application is declined due to the source status, the applicant sees a message explaining that the application can't be submitted. Note that the expiration date is checked regardless of status validation. If the license is expired, the application is declined regardless of the status.
License type	When integration is not enabled, the agency must create a license type for contractor licenses. Set up the license type in the contractor license options. Applicants must select this value as the license type when they enter contractor license information in an application. Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.	License types are not enabled in the contractor options, and applications do not include a license type field. Use license classifications to track the specific types of work that a contractor is licensed to perform.

Contractor Information in the Intake Form

Your agency may limit your license selection in the application to their own list of contractors, regardless of an integration with an external source. In this case, the contractor list is the source of truth. Only agency-approved contractors can be entered in the application. You can look up a contractor by license number, business name, or owner name to retrieve license information.

When your agency doesn't limit your license selection to their list of contractors, and you integrate with an external licensing body, the process initially checks the data in your main contractor records. If you don't have a record of the license number, the process can retrieve license information from the external source.

If an applicant self-identifies as a contractor, then a license number is required. If integration is active and license selection isn't limited to the contractor list, all other fields are read-only and can be populated only by the process of

validating the license number. When an application that includes a license number is submitted, the system creates a new contractor record if there isn't already a record for the specified license number.

When public users review details for submitted applications, they can see the contractor information. As with all other information in a submitted application, the contractor information is read-only.

Authorized Agents

A contractor's authorized agents, such as employees or contractors associated with the contracting business, can submit applications on behalf of a contractor. If you include the Authorized Agent field group in an application form, the applicant can self-identify as an authorized agent. Information about self-identified agents is saved to the associated contractor record. Newly identified agents are saved with a status that shows that verification is pending. Agency staff can review the information, update the verification status, and indicate whether the authorized agent is a contractor operating under the contractor license.

Agency staff can't add authorized agents in a contractor record. Agents are added only when they submit applications where they self-identify as agents.

Agency staff also can't remove authorized agents from a contractor record. Instead, they mark the verification status as failed.

The list of authorized agents and associated contractors for a contractor record is informational only.

Managing Contractor Licenses

Agency staff use the main contractor licenses page to enter and maintain information about licensed contractors and their authorized agents.

Viewing Contractor Licenses

To view the summary information on the contractor list page:

1. Select **Contractor > Contractors**.
2. Review the following summary information:

Page Element	Description
License	Displays the contractor license number and its status.
Dates	Displays the license issue date (or reissue date, if one exists), and the license expiration date.
Contractor	Displays the name of the contractor business.
Address	Displays the address of the contractor business.

Page Element	Description
Manually Changed	Displays the date that the contractor record was last manually updated and the user who made the changes.
Last Refreshed	Displays the date that license information was most recently synchronized with the external licensing body's record. This field is relevant only if integration is active.
Used in Application	Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications. When a record is created in the main contractor pages, the initial value is <i>No</i>. The value is <i>Yes</i> if an application referencing this license has been submitted.
Contractor Approved	Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor license is approved by the agency and available for use with an application. You can't select a contractor license or submit an application when a license is not approved in the contractor records. If the agency changes a license to not approved after an application was submitted, an icon on the license in the application details indicates that the license is not approved. This option doesn't affect the license status. For example, you can change an active license to not approved for business purposes.

3. Use the three-dot **Actions** menu to perform these actions:

Action	Description
Edit	Select this action to access the detail page, where you can update the contractor information, including the status of the license.
Validate	Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.
Delete	Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the Used in Application field.

Manually Adding Contractor Licenses

Your agency may initially use an automated batch method to load multiple records from a file or an integration with an external licensing body. However, you can also manually add individual contractor licenses to the main contractor records shown in the list on the Contractors page.

To manually add a contractor license:

1. Select **Contractor > Contractors**.
2. Click **Add**.

The **Add Contractor** page displays the following the read-only information:

Page Element	Description
License Source	Identifies the license's status coming from the licensing body and brought in through integration with the external source. This field is displayed only when an integration is enabled. See Setting Up Contractor License Options .

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
5. If you do *not* integrate with an external licensing body, enter the following:

Page Element	Description
License Type	Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform. This field is not visible if you integrate with an external licensing body.
License Status	Select the license status. Values include <i>Active</i> , <i>Canceled</i> , <i>Expired</i> , <i>Suspended</i> , <i>Revoked</i> , and <i>Inactive</i> . This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses. When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see Setting Up Contractor License Options .

6. If you use integration to get information from an external licensing body:
 - a. Click **Validate**.
This button is visible only when integration is enabled. The validation process uses the license number to retrieve additional details from the licensing body. When the process finishes successfully, it populates the rest of the fields on the page.
It's helpful to note that the **Get Details** button in the application intake and the transaction details also automatically fills in the contractor fields. However, this information comes from the agency's list of

contractors that have already been validated. If the contractor isn't in the agency contractor list, and an integration is available, the contractor information comes from the external source.

b. Confirm the license status.

The read-only **Source Status** field displays the status provided by the external licensing body. This value is updated any time you re-validate the license. Your contractor options map the source status to a status that comes from the set of statuses your agency assigns to licenses. If a source status is not mapped to an agency status, the default agency status is *Other*.

7. Enter, update, or review information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Business information includes these fields:

Page Element	Description
Business Name	The name of the contractor business.
Ownership Type	The ownership structure for the business, such as <i>Sole Proprietor</i> or <i>Partnership</i> .
Postal Code	The business address. The Country field displays US. 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, click the Don't know link to display a full set of address fields.
Phone	The phone number for the business.
Issue Date	The date that the license was originally issued.
Reissue Date	The date that the license was reissued after a period of inactivity or after it expired.
Expire Date	The date that the license expired or is due to expire.

8. Enter, update, or review additional information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

System-wide contractor options determine what additional information is available and how it is labeled. Your agency can change the section names on the Contractor License Sections page. If the agency displays all available information using the default labels, these sections appear:

Section Name	Description
Classifications	License classifications indicate the type of work that the contractor is licensed to perform. This grid lists a Code and a Description for each classification. If integration is not active and the fields are editable, selecting a code displays the associated description.
Contractor Bond	Contractor bond information includes the Company Name (the bond issuer), Policy Number, Amount, Effective Date, and Cancellation Date .
Other Bonds	Information for other bonds includes a Qualifier Name (the name of the qualifying individual on the bond) and the same fields that appear for contractor bonds.
Workers' Compensation	Insurance information includes the Insurance Type (such as Workers' Compensation), Company Name, Policy Number, Exempt status, Effective Date, Expiration Date, Cancellation Date, and Suspend Date .

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

The Add Contractor page closes after you save.

The next time you access the details for this contractor, the detail page displays two tabs: The **License Information** tab displays the information you entered when you added the contractor. The **Associations** tab lists any users who submitted applications where they self-identified as the contractor or as an agent for this contractor.

Modifying License Information

You can modify license information depending on the permissions assigned to you. When your agency isn't integrated with an external licensing body, both system administrators and permit technicians can update license information. When integration is on, only system administrators can update license information, but permit technicians can approve licenses. Only agency staff with the contractor administration duty role have the privileges needed to delete a license from the contractor records.

To modify the license information for a contractor:

1. Select **Contractor > Contractors**.
2. Click **Edit** in the three-dot **Actions** menu for the license that you want to modify.
3. Make your updates:
 - Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
 - Update the **License Status**.

- If integration is active, click the **Validate** button to retrieve the most recent contractor information and refresh the license detail fields.
System administrators can update data manually even when integration is active.
- If integration is not active, manually modify the contractor information as needed.

4. Click **Save**.

Managing Authorized Agents

Authorized agents are added when an applicant self-identifies as an agent for a licensed contractor. There can be multiple applicants who self-identify as agents for the same contractor. The agent's name and contact information are copied from the applicant information on the intake form and added to the list of authorized agents in the **Associations** tab of the contractor record.

You can't manually add authorized agent information for a license, but you can verify agents and update an agent's verification status depending on the results. Only verified agents are marked as active. Agents who are pending verification or whose verification failed are marked as inactive.

To manage authorized agents for a license:

1. Select **Contractor > Contractors**.
2. Locate and select the contractor license.
3. Click the **Associations** link to access the tab with authorized agent information.
4. Review the following information:

Page Element	Description
Agent	Displays the authorized agent's name, email, and phone.
Business	Displays the business name from the contractor license details.
Type	Displays the relationship this person has to the contractor license: ◦ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license. ◦ <i>Contractor</i>: A person who is a contractor operating under this license.
Address	Displays the authorized agent's address.
Association	Displays <i>Active</i> if the agent has been verified. Displays <i>Inactive</i> if verification is pending or the verification has failed.

5. Click a row to access agent details.
6. Update the **Verification Status** by selecting *Verified*, *Pending verification*, or *Verification failed*.
The default status for an agent who submits an application is *Pending verification*.
7. Update the **Association Type** by selecting *Authorized Agent* or *Contractor* to indicate how the person is associated with the licensed contractor.

8. The **Last Reviewed** field displays the date when the authorized agent information was last reviewed.
9. Make any necessary changes to the agent's personal information or contact information.

The default values are copied from the applicant section of the intake form where the applicant self-identified as an authorized agent. You can update everything except the agent's name.

10. Click **Save**.

The detail window closes and your changes are saved. If you changed the verification status, the system also updates the **Association** field on the agent list and the **Last Reviewed** field on the agent detail page.

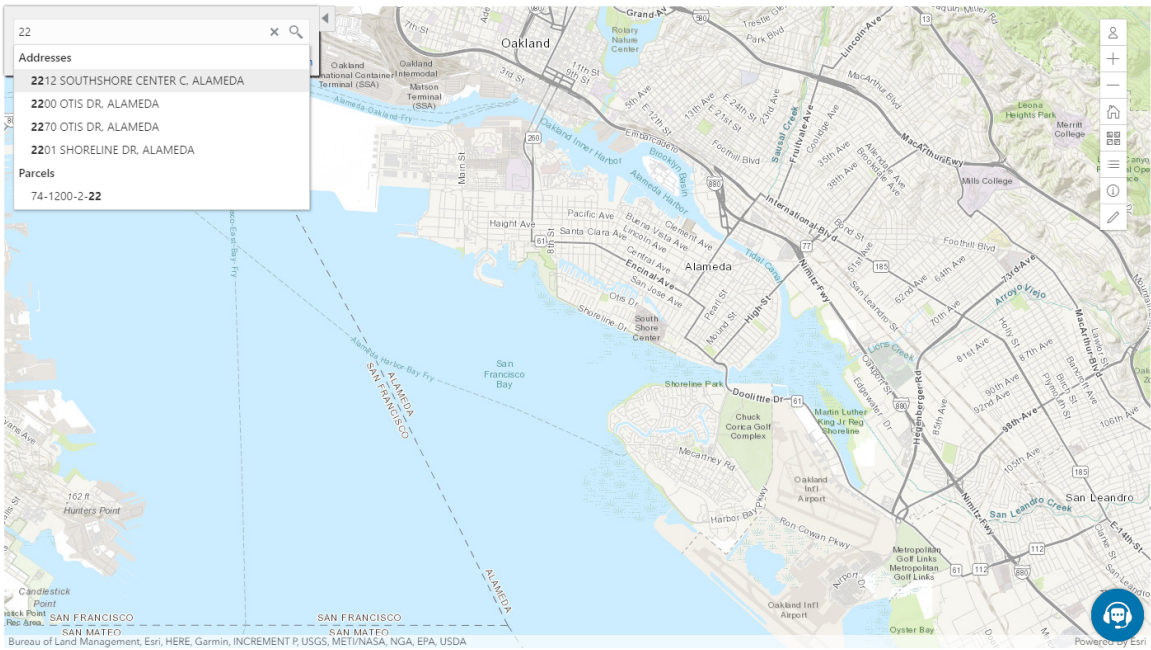
13 Working with Maps

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.	- View existing applications and projects. - Search and select properties.

Map Name	Users	Navigation	Usage
			- 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.	- View existing applications and projects. - Search and select properties. - View transactions for a selected property. - Access an interactive guide for selecting application types. An anonymous user who attempts to start an application is required to register or sign in first.
Registered public user map	Registered public users	Registered public users click the Explore Your City tile on the landing page.	- 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. See <i>Working with Property Information</i> .
Mobile inspection	Agency staff	Use the Oracle Inspector mobile application.	View permits and planning applications on a map.

Map Name	Users	Navigation	Usage
			See 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	- 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 Viewing Recent Issues .

Maps in Transaction Headers

This table describes the map that appears in transaction headers:

Map Name	Users	Navigation	Description
Transaction header	Agency staff Registered public users	Access the detail page for the transaction.	The map that appears at the top of various detail pages. For example, this map appears in the detail pages for 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.

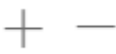
Using the Map Toolbar

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.

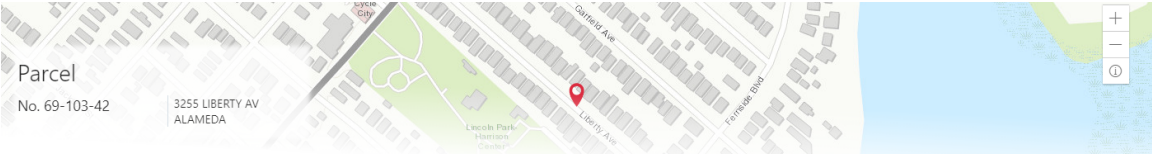
Viewing Map Markers

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.

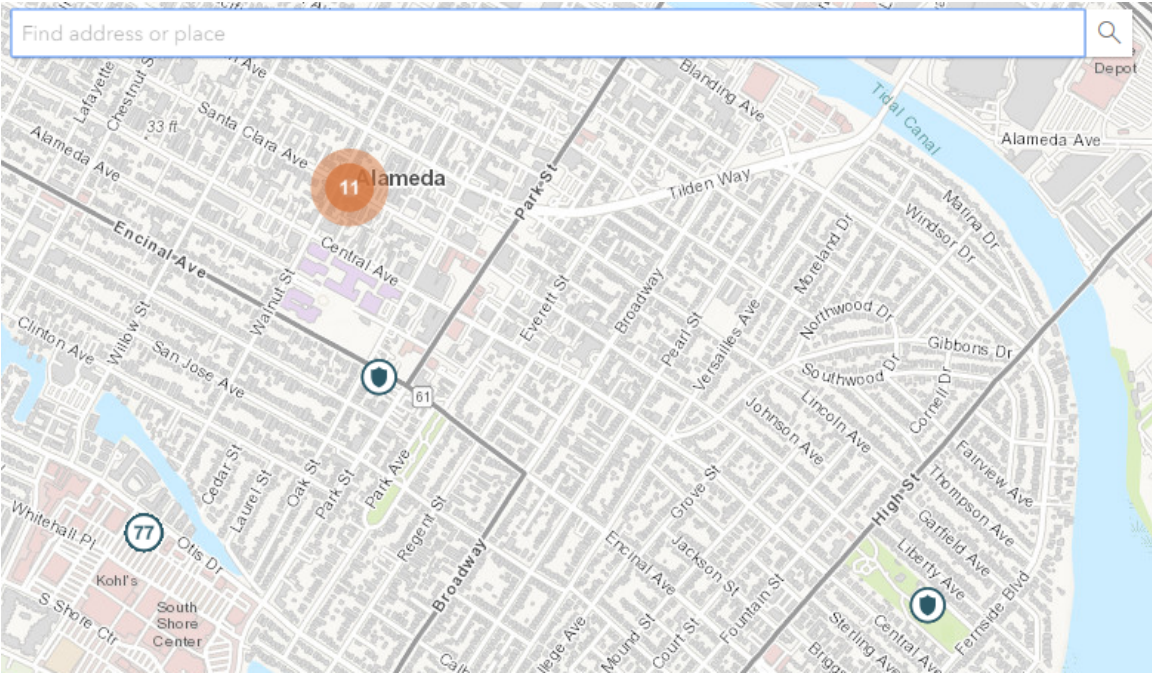


Other Map Markers

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.

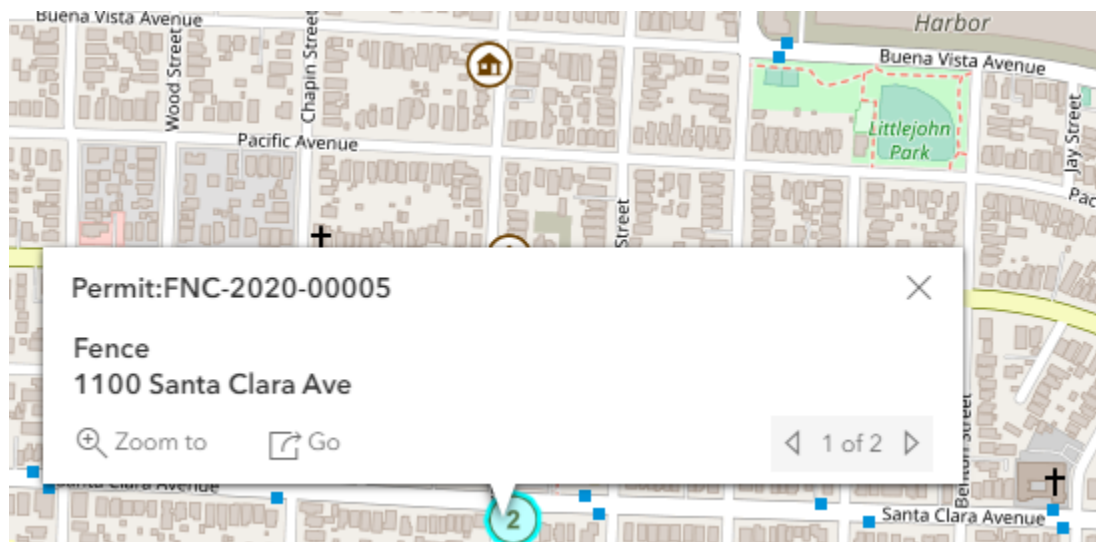
Map Marker	Description
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions.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

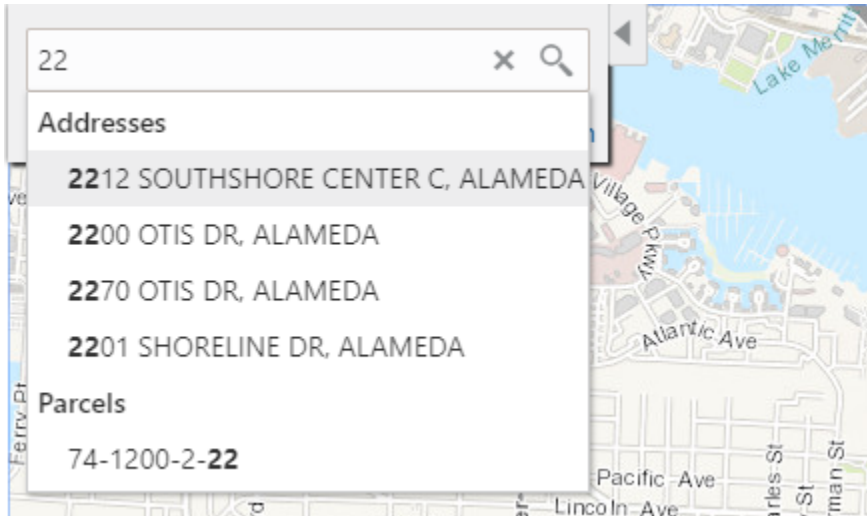
- Search for transactions and view transaction markers on the map.

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.

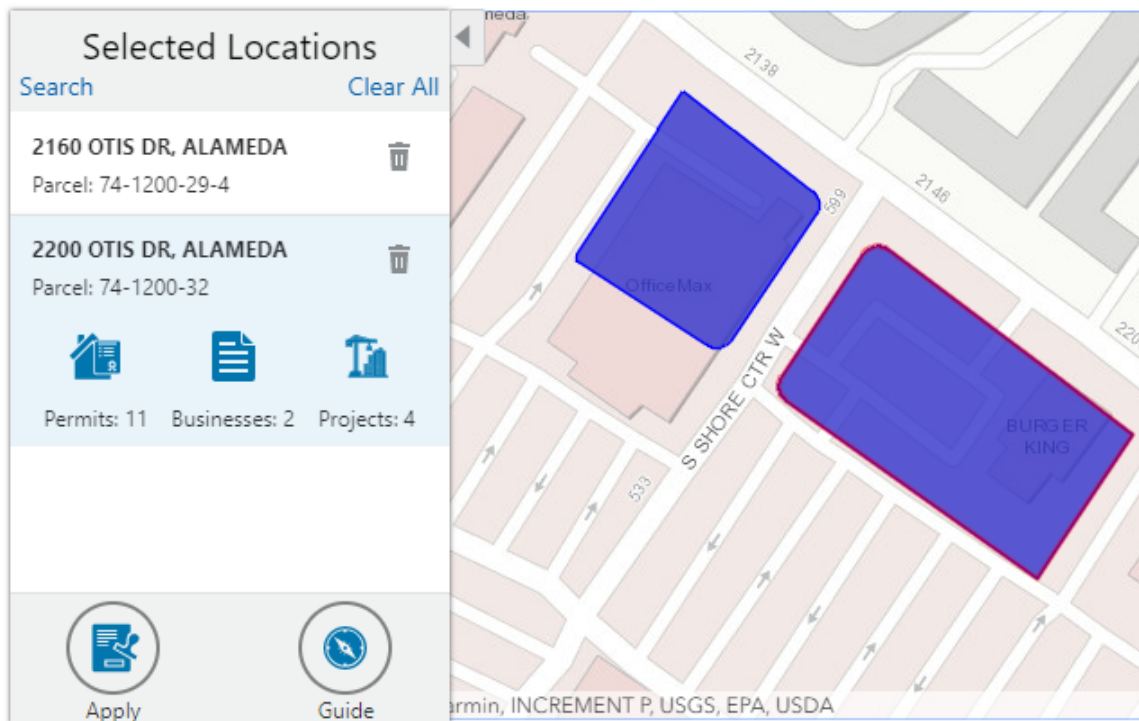
Note: To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience.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

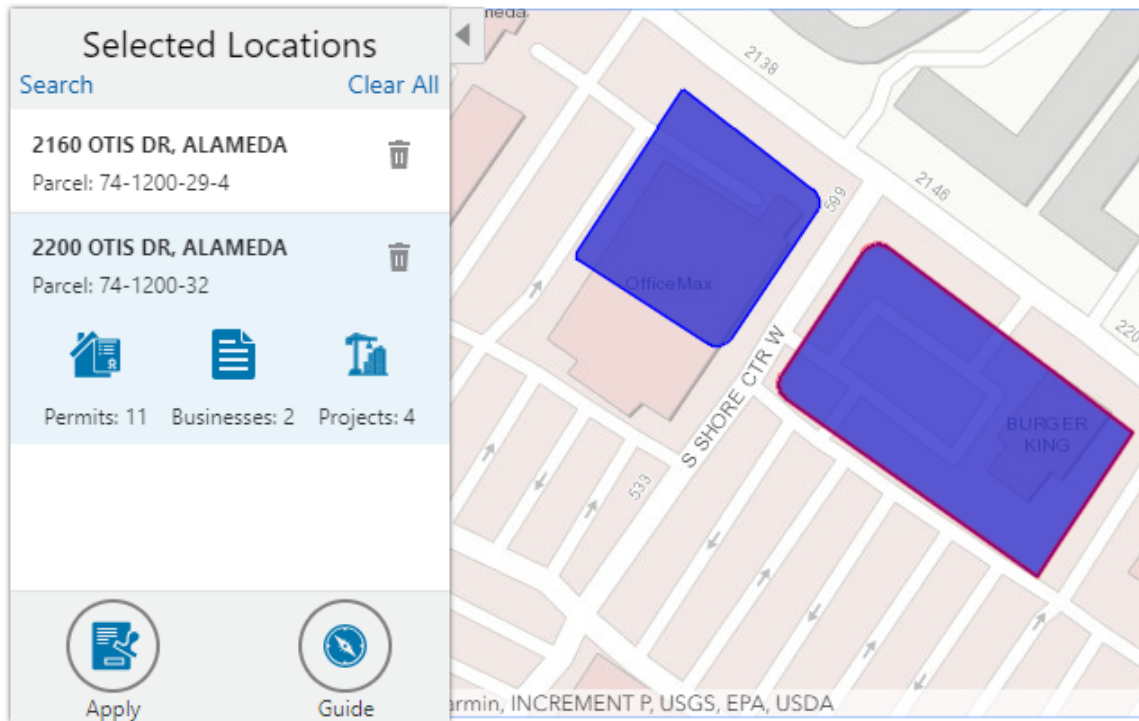
3. Review details of your selections on the Selected Locations list.

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).

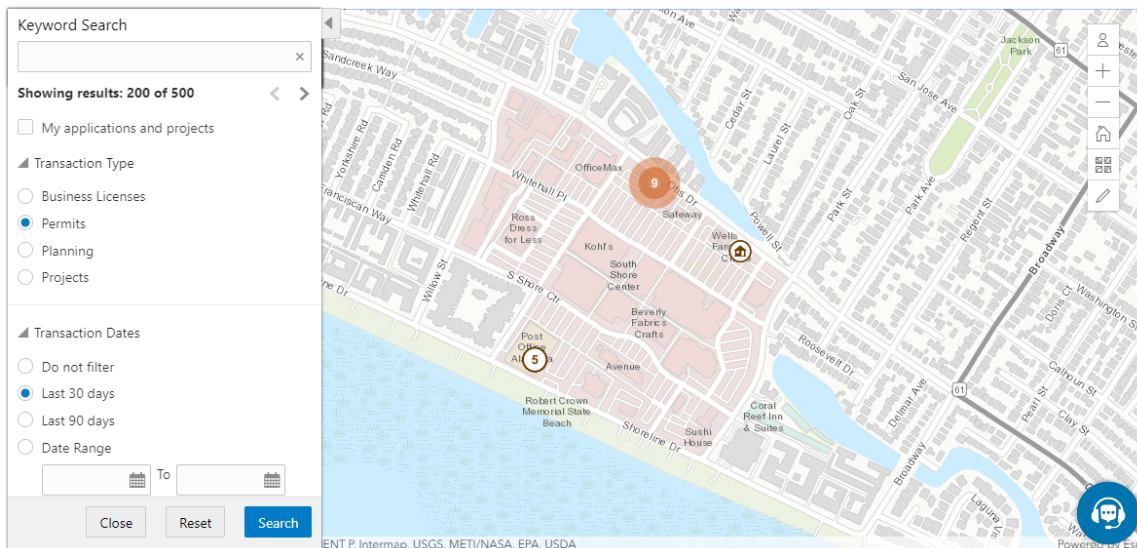
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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**.

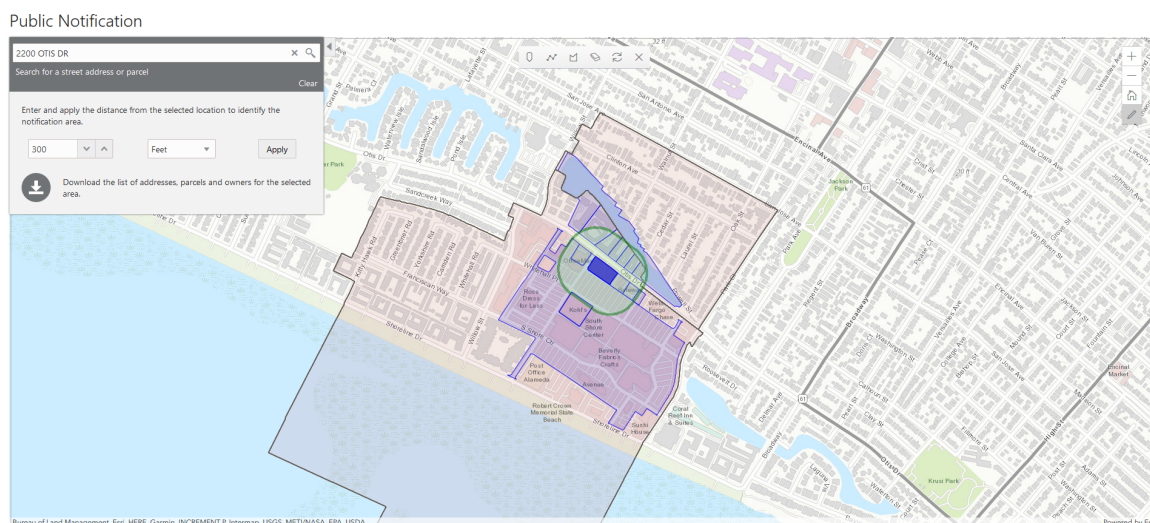
7. To close the advanced search and return to the simple location search, click **Close**.

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.

14 Working with Payments

Payment Flow Overview

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

After an application is submitted, the fees are calculated and applied to the applicant's account. The applicant can pay fees for one application at a time from their Applications list page or from the Fees and Payments page in the application details. Only applicants can select multiple applications for payment on the Make a Payment page, which they access from the registered user landing page or their Applications page. Agency staff can initiate payment from the Transactions list page or from the Fees and Payments page in the application details. System processing for payments triggers workflow and generates accounting, invoices, and communications.

For information about setting up fees and payments, see *Implementing Your Financials Framework*.

Understanding Fees

Some basics about fees include the following:

- Fees for an application are determined by decision modeling and associated with fee schedules.
- Fees may be applied during the application process or later for additional fees or adjustments.
- Fees appear on the Applications and Make a Payment pages for applicants, on the Transactions list page for agency staff, and on the Fees and Payments page in the application details for both agency staff and applicants.
- If a condition to prevent payment is applied to the transaction, the fees can't be paid until the condition is resolved.
- Agency staff can add, adjust, or refund fees. They can also make full or partial fee payment on behalf of the applicant.

Fee Payments Process for Applicants

Applicants have different options for paying fees after they log in.

Applicants can pay for fees one application at a time by clicking the **Pay** icon in the application row on the Applications page or by clicking the **Pay** button on the Fees and Payments page for the application. Clicking **Pay** takes the applicant directly to checkout for payment processing.

The **Make a Payment** button on the registered user landing page and on the Applications page takes the applicant to the Make a Payment page, where they can select fees for multiple applications at once before continuing to checkout.

Here's how to pay fees from the Make a Payment page:

1. Select applications for payment.
Fees for applications not selected for payment are still payable and remain on the page.
2. Review the number of applications selected and the total amount, then click the **Make a Payment** button.
3. Review the Checkout page, which shows the different secured payment methods available.

Only agency staff can process cash and check payments.

4. Select one of the payment methods for payment processing and click **Make Payment**.

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

The applicant must have a PayPal account before selecting PayPal as a payment method.

5. Wait for the payment to be processed. If you navigate away from the payment service or close the browser, the payment may not be recorded.

After submitting the payment, the application displays the *Payment Processing* status on the Make a Payment page. If the payment goes through, the application is removed from the Make a Payment page and the applicant is redirected to the page where the payment was initiated. If the payment fails, the applications can be selected for payment again.

For more information, see *Making Payments*.

For information about paying fees for individual applications on the registered public user's Applications page or the Fees and Payments page in the application's details, see *Managing Transactions* and *Working with Fees and Payments*.

Fee Payments Process for Agency Staff

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

1. Click the **Pay** button for a permit, planning application, or business license listed on the Transactions page or on the Fees and Payments page in the application details.
2. On the Pay Fees page, review the list of fee items and the total payable fee. If you want to make a partial payment, deselect the *Select All* check box to clear the check boxes for all the fee items and then select individual items. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.
3. Click the **Continue** button.
4. Review the Checkout page, which lists the different payment methods available, such as cash or credit card.
5. Select one of the payment methods for payment processing.

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

After successful payment, the agency user is returned to the page where the payment was initiated. The fee item records are now updated. For more information, see *Managing Transactions* and *Working with Fees and Payments*.

Working with Cashier Sessions

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

Opening a Cashier Session

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

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

4. Click **Save**.

Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:

- Suspend an open cashier session by setting the **Status** to *Suspended*.
- Reopen a suspended or closed cashier session by setting the **Status** back to *Open*.

This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See [Setting Up Agency Payment Options](#).

- Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

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

4. Click **Save**.

Note: You cannot edit a cashier session that has been reconciled. See [Reconciling Cashier Sessions](#).

Reconciling Cashier Sessions

Agency staff adjust and reconcile cashier sessions on the Reconcile Cashier Session page.

Agencies that collect payments must reconcile the money collected in the form of cash and checks at the end of each cashier session. On the Reconcile Cashier Session, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page.

Reconcile Cashier Session

Cancel

Save Reconciliation

Complete Reconciliation

Cash Drawer ID: Cash Drawer 01

Session ID: 1022

Start Time: 9/29/18 3:26 AM

End Time: 8/8/19 11:25 PM

Status: Closed

Reconcile Status: Unreconcile

Payment Information

Payment Method	Currency	Opening Balance	Recorded Amount	
Cash	USD	100	93.5	>
Personal check	USD	0	67	>

Comments

Reconciling Recorded and Actual Amounts

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the row for the cashier session that you want to reconcile.

Note: You can view payment information for open cashier sessions on this page, but a cashier session must be closed before you can reconcile recorded and actual amounts. For more information on closing cashier sessions, see *Working with Cashier Sessions*.

3. Click the row for the payment method that you want to reconcile to access the Payment Details page.

This example shows the Payment Details page.

Payment Details

Save

Payment Summary

Payment Method: Cash

Currency: USD

Opening Balance: 100

Total Overage: 0

Recorded Amount: 93.5

Total Shortage: 1.25

Actual Amount:

Payment Details

Receipt Number	Receipt Line Number	Recorded Amount	Actual Amount	
6	1	67		>
5	1	26.5		>

4. Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

Page Element	Description
Payment Method	Select between <i>Personal check</i> and <i>Cashier check</i> .
Actual Amount	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.
Check Number, Check Date, Payer Name, and Address	Update the check and payer information.
Comments	Enter any comments you want to add about the check payment.

5. Click **Save**.
6. On the Payment Details page, enter the actual amount for the cashier session for all receipts for the payment method. After you enter a value in the **Actual Amount** field, the page displays any overages or shortages in the **Total Overage** and **Total Shortage** fields.
7. Click **Save**.
8. On the Reconcile Cashier Session page, enter any comments you want to add for the entire cashier session and click **Save Reconciliation** to save all the changes you made for the cashier session.
9. Click **Complete Reconciliation**. This changes the status of the cashier session from *Unreconciled* to *Reconciled*. In addition, the **Save Reconciliation** button is replaced by the **Print Report** button, and the **Complete Reconciliation** button is replaced by the **Generate Event** button.

Note: Once you complete a reconciliation for a cashier session, you can't reopen it or make any adjustments to the session.

Printing a Cashier Session Reconciliation Report

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to print a reconciliation report.
3. Complete the reconciliation for the cashier session if you haven't already. You can print reconciliation reports only for sessions with a **Reconcile Status** of *Reconcile*.
4. Click **Print Report**. The generated report opens in a separate browser tab.

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

The Cashier Session Reconciliation report requires the definition of a parameter with the following values:

Page Element	Value
Parameter ID	1

Page Element	Value
Parameter Name	P_RECONCILE_ID
Parameter Data Type	String

For more information on defining parameters for reports, see [Setting Up Reports](#).

Generate Accounting Entries for Reconciliation Overages and Shortages

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to generate an accounting entry.
3. Complete the reconciliation for the cashier session if you haven't already. You can generate accounting entries only for completed reconciliations that result in an overage or a shortage.
4. Click **Generate Event** to generate an accounting entry for the overage or shortage.

Note: To successfully create accounting entries for cashier reconciliation overages and shortages, you must first create accounting rules for them. For more information on setting up accounting rules, see [Setting Up Accounting Rules](#).

Printing Deposit Slips

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

You print deposit slips using the Print Deposit Slip page.

Prerequisites

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

Generating Deposit Slips

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

Page Element	Description
Agency ID	Select the agency for which you want to print a deposit slip.
From Receipt Date and To Receipt Date	Select the date range of receipts that you want to include in the deposit slip.

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

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

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

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

Viewing Payment History

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

This example shows the Payment History page.

Payment History

Payment Method	Payment Reference ID	Payment Transaction ID	Receipt Date	Amount Paid	Currency	First Name	Last Name	Record ID	Record Type
Credit card	EPAY_20201104T0621214462357074	43558	11/4/20	10,160.57	USD	Peter	Skate	STBL-2020-0051	BLQANATAKCLASS6 >
Credit card	EPAY_20201104T0649530642566803	43562	11/4/20	10,160.57	USD	Peter	Skate	STBL-2020-0052	BLQANATAKCLASS6 >
Credit card	EPAY_20201104T0330223032716275	43550	11/4/20	9,929.00	USD	Peter	Skate	STBL-2020-0043	BLQANATAKCLASS6 >
Credit card	CRCD_20201104T0730410742887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPER-FEN-2020-00429	PMTQAFFERECAL >
Credit card	CRCD_20201104T0730410742887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPZ-SITE-2020-00215	PMTQAFFERECAL >
Credit card	EPAY_20201104T1432518402789051	43617	11/4/20	823.56	USD	Peter	Skate	ZPER-FEN-2020-00670	PaymentBNP >
Credit card	EPAY_20201104T0950510042791445	43597	11/4/20	2,860.00	USD	Peter	Skate	ZPER-FEN-2020-00635	PaymentBNP >
Credit card	CRCD_20201104T0730410742887861	43570	11/4/20	10,872.56	USD	Peter	Skate	ZPER-FEN-2020-00271	PMTQAFFERECAL >

Page 1 of 12 (1-8 of 89 items) < 1 2 3 4 5 ... 12 > X

Show Default

Reviewing Payment History

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

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

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

- Payment method
- Payment reference ID
- Payment transaction ID
- Receipt date
- Payment amount
- Payment currency
- Payer first name
- Payer last name
- Record ID
- Record type

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

This example shows the Payment History Details page.

Payment History Details

Cancel

Payment Method: Debit card

Payment Reference ID: DRCD_20201104T122209082Z056247

Payment Transaction ID: 43605

Receipt Date: 11/4/20

Amount Due: 823.56

Amount Paid: 823.56

Currency: USD

First Name: Peter

Last Name: Skate

Receivables Receipt Status: Created

Payment History Lines

Line	Item Description	Item Amount	Item Currency
1	Application Fee	823.56	USD

Refund History

Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Processed Date
11/4/20	823.56	USD	Refunded	11/5/20

If your agency is integrated with Oracle Receivables, but the **Receivables Receipt Status** for a payment is *Error*, the **Generate Receipt** button appears on this page. Once you correct the source of the error, click **Generate Receipt** to manually create a miscellaneous receipt for the payment and send it to Oracle Receivables. For more information on the integration with Oracle Receivables, see *Oracle Receivables Integration Overview*.

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

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

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

The Refund History grid displays any refunds associated with the payment. You can select a refund to view additional details on the Refund Detail modal page. For more information on refunds, see [Viewing and Processing Refunds](#).

Viewing Invoice History

Agency staff can view invoice history on the Invoice History page.

This example shows the Invoice History page.

Invoice History

Invoice	Invoice Date	Person Name	Invoice Amount	Invoice Currency	
E2E-190830-00001	8/30/19	Alden Richards	148.80	USD	>
E2E-190830-00002	8/30/19	Carl Jones	148.80	USD	>
E2E-190830-00003	8/30/19	Alden Richards	148.80	USD	>
E2E-190830-00004	8/30/19	Alden Richards	148.80	USD	>
E2E-190830-00005	8/30/19	Alden Richards	148.80	USD	>
E2E-190830-00006	8/30/19	Carl Jones	148.80	USD	>
E2E-190830-00007	8/30/19	Alden Richards	148.80	USD	>
E2E-190830-00008	8/30/19	Alden Richards	148.80	USD	>

Page 1 of 12 (1-8 of 91 items) | 1 2 3 4 5 ... 12 | Show Default

Reviewing Invoice History

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

Note: Registered public users can also access this page from the Registered Public Landing Page by selecting *View Invoice History* from the **I Want To** field. Public users can view only their own invoices.

The Invoices History page displays all of the invoices issued by the agency. You can search for and sort invoices by:

- Invoice ID
- Invoice date
- Person name
- Invoice amount
- Invoice currency

2. Select an invoice to view additional details on the Invoice History Details page.

This example shows the Invoice History Details page.

Cancel
Print Invoice

Invoice

EZE-190830-00001

Invoice Amount

148.80

Invoice Currency

USD

Invoice Date

2019-08-30

Person Name

Alden Richards

Address

12pine grove 12 SAN FRANCISCO
California US

Description

EZE-190830-00015

Invoice Lines

Download

Description	Line Amount	Invoice Currency
Electrical Fees	148.80	USD

The Invoice Lines grid displays the transaction lines associated with the invoice. You can select a invoice line to view additional details on the Invoice Line Detail modal page.

Click **Print Invoice** to generate a printable invoice.

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

Viewing and Processing Refunds

Agency staff can view refund history, process refunds, and print refunds from the Refund History page.

Agency staff initiate refund requests from the Fees and Payments page for transactions. For more information on initiating refund requests, see *Working with Fees and Payments*.

To distribute requested refunds to customers, agency staff must review and process them on the Refund History page.

This example shows the Refund History page.

Refund History

Download

Refund ID	Refund Type	Refund Method	Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processed Date
RFND_20191217101050000299540	Chargeback	Credit card	12/17/19	145.00	USD	Refunded	Cancel	2019-12-17T10:12:32.060+00:00
RFND_20191217T0807440000265030	Refund	Offline	12/17/19	111.00	USD	Refunded	Cancel	2019-04-15T00:00:00+00:00
RFND_20191217T242480000295571	Refund	Offline	12/17/19	111.00	USD	Refunded	Paid in error	2019-12-18T23:34:07.520+00:00
RFND_20191217T0641370000224132	Refund	Offline	12/17/19	123.00	USD	Refunded	Duplicate payment	2019-12-18T23:32:45.697+00:00
RFND_20191217T0936310000201719	Chargeback	Credit card	12/17/19	12.00	USD	Failed	Cancel	2019-12-17T09:38:01.582+00:00
RFND_20191217T0936310000260439	Refund	Offline	12/17/19	100.00	USD	Pending	Duplicate payment	
RFND_20191217T0828520000280097	Refund	Offline	12/17/19	300.00	USD	Refunded	Excess paid	2019-12-17T00:00:00+00:00
RFND_20191217T0732210000233043	Refund	Offline	12/17/19	111.00	USD	Refunded	Duplicate payment	2019-12-17T07:34:05.522+00:00

Page 1 of 16 (1-8 of 128 items)

1
2
3
4
5
16

Show Default

Reviewing Refund History

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

The Refund History page displays all of the refunds requested or processed by the agency. You can search for and sort refunds by:

- o Refund ID
- o Refund Type

- Refund Method
- Refund Request Date
- Refund Amount
- Refund Currency
- Refund Status
- Refund Reason
- Refund Processed Date

2. Select a refund to view additional details on the Refund Detail page.

This example shows the Refund Detail page.

Refund Detail

Refund ID: RFND_20191217T095631000260439

Refund Type: Refund

* Refund Method: Offline

Refund Request Date: 2019-12-17

Refund Amount: 100.00

Refund Currency: USD

Refund Status: Pending

* Refund Reason: Duplicate payment

Payment Method: Trust account

Payment Reference ID: TRSA_20191217T0826376482478731

Refund Processed Date:

Refund Transaction ID:

Refund Lines

Item Name	Item Description	Item Refund Amount	Item Refund Currency
300100185078326	APPLICATION	100	USD

The Refund Lines grid displays the items included as part of the refund. You can select a refund to view additional details on the Refund Detail modal page.

Processing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.
3. On the Refund Detail page, select a **Refund Method**.

Select *Offline* if you are issuing a manual check for the refund, or issuing an electronic refund through a system that is not connected to Oracle Public Sector Compliance and Regulation. This is the only option available for payments that were made by check or cash.

Select *Credit Card* to credit the refund back to the credit card that was used to make the payment.

Refunds to credit cards are processed through Oracle Fusion Payments. For detailed information on setting up the integration with Oracle Fusion Payments, see *Public Sector Compliance and Regulation: Financial Integrations*.

Note: Cashiers processing refunds charged back to credit cards must have the Accounts Receivable Manager Segregated Role (ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB) assigned to them. For more information on assigning roles to agency staff, see *Setting Up Agency Staff*.

4. Click **Process Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Refunded* and enters the date and time that the refund was processed in the **Refund Processed Date** column. In addition, the process creates an accounting entry for the refund.

If you configure a template for the delivered Refund Notice communication event, processing the refund triggers the generation of a communication to the refund recipient. For more information on communication event templates, see [Setting Up Communication Templates](#).

Note: If an error occurs before or after a refund is process, the system changes its status to *Failed*. To prevent duplicate refunds from being processed agency staff cannot process a failed refund. You must set the refund status back to *Pending* through a patch request before attempting to process the refund again.

Printing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Refunded*.
3. On the Refund Detail page, click **Print Refund** generate a printable file for the refund in a separate browser tab.

15 Working with Accounting

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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

Generating Journal Entries

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

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

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

Entering Generate Accounting Process Parameters

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

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

Scheduling the Process

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

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

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

Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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

Submitting the Process

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

Reviewing Journal Entries

You view and edit journal entries on the Journal page.

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

Viewing Journal Entries

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

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

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

Reviewing Accounting Lines

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

- **Program**

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

Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.

You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

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

When a *Publish Accounting* integration is enabled for your agency, the Export Journals to ERP process publishes accounting information to OIC where it can be transformed and imported by third-party applications. For more information, see [Setting Up Agency Integrations](#).

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

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

Entering Export Journals to ERP Process Parameters

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

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

Page Element	Description

Scheduling the Process

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

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

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

Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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

Submitting the Process

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

Processing the Journal Entry Output

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

16 Working with Processes

Using the Process Monitor

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

This example shows the Process Monitor page.

Process Monitor

[Schedule New Process](#) 

Name	Process ID	Status	Submitted By	Submission Time	Scheduled Time	Actions
Export Journals to ERP	14336	Running	SYSTEM_ADMIN	5/8/19 3:08 PM PDT	5/8/19 3:08 PM PDT	 
Generate Accounting	14306	Succeeded	SYSTEM_ADMIN	5/8/19 3:01 PM PDT	5/8/19 3:01 PM PDT	 

Scheduling a New Process

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

Note: Processes can be run immediately or scheduled to run at a specific time. If you want to schedule a recurring process beyond 20 years into the future, the **End Date** must have a four-digit year. This requires updating the date format defined in the regional preferences. From the account menu, select **My Preferences**, click **View Advanced Preferences**, and select **Regional**. On the General Preferences: Regional page, you can update the **Date Format** to use a four-digit year.

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

Managing Processes

Select **Common > Process Monitor**.

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

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

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

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

You can manage processes using the following page elements:

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

17 Using the Digital Assistant

Overview of Digital Assistant

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

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

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

Asking Details

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

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

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

Asking Questions

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

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

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).

18 Using Accessibility Features

Overview of Accessibility

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

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

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

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

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

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

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

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

Keyboard Shortcut	Description
Spacebar	Use for: • Selecting a tab • Activating a button • Selecting a check box • Selecting a radio button that is not selected
Enter	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
Down Arrow	Use for: • Moving through values in a drop-down list • Selecting different values in a set of radio buttons • Moving between different folder tabs
Up Arrow	Works the same as the Down Arrow, except it enables you to move in the opposite direction (previous instead of next).
Left Arrow	Works similar to the Up Arrow.
Right Arrow	Works similar to the Down Arrow.
Home	When in the context of tabs, sets focus to the first tab.
Ctrl+Home	Takes you to the very top of a page.

Using the Keyboard with Data Collections

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

Tables

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

Country

Search...

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

Page 1 of 22 (1-11 of 240 items)

1
2
3
4
5
...
22

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

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

List View

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



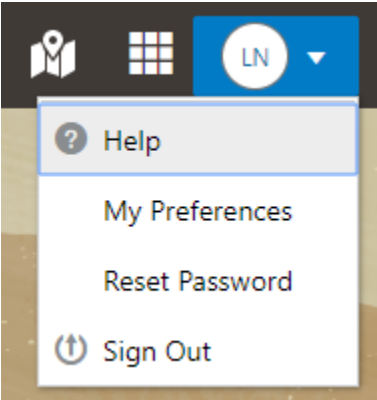
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item, 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

7/9/18

Valid to Date

<

July

2018

>

Public User Enabled

* Department

1

Workflow Space Name

9

Workflow Application ID

2

3

4

5

6

7

8

10

11

12

13

14

15

16

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20

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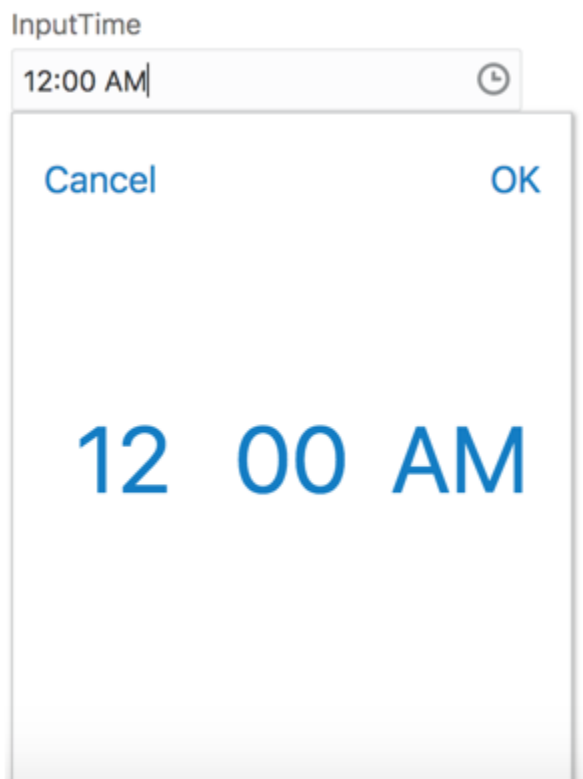
Today

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

Target	Key	Description
	Esc	Close the grid.
	Home	Move focus to first day of the month.
	End	Move focus to last day of the month.
	Page Up	Switch to previous month.
	Page Down	Switch to next month.
	Alt+Page Up	Switch to previous year.
	Alt+Page Down	Switch to next year.
	Ctrl+Alt+T	Places focus on 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.

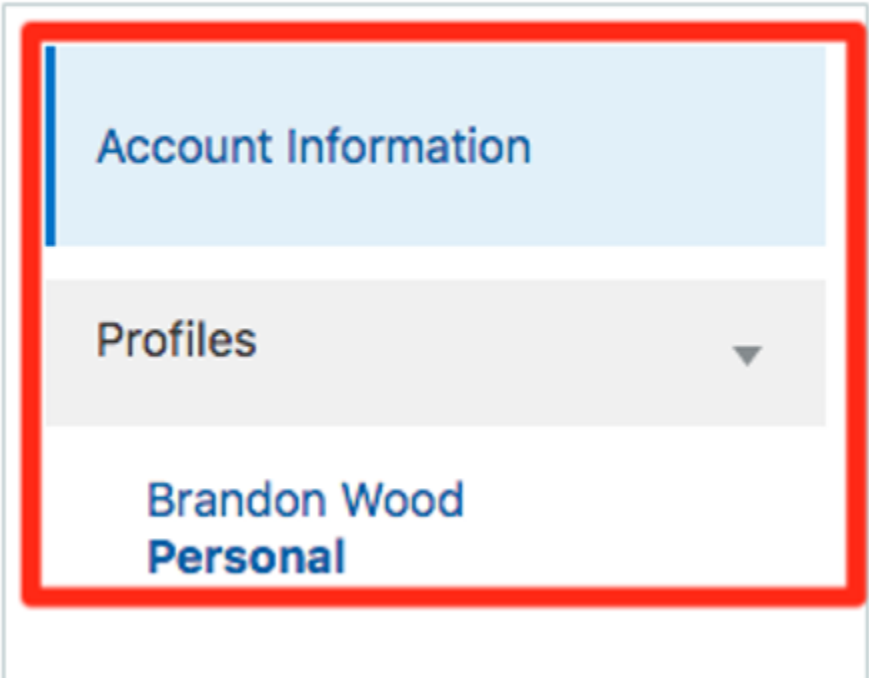
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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