

# Oracle Public Sector Licensing and Permitting

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**Using Community Development  
Code Enforcement**

22B

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# 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/>

## Documentation Accessibility

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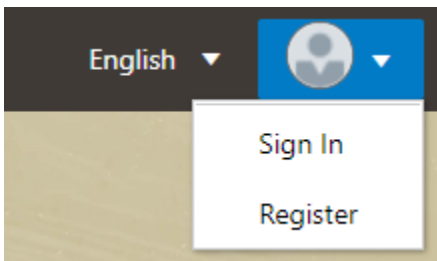


# 1 Managing Public Users

## The Public User Registration Process

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

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



Here is a summary of the registration process:

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

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

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

This example illustrates the Register page and is described in the following table.

## Register

\* Account Use  Personal  Business

Hide my contact information from public view

Salutation

\* First Name

\* Last Name

Your email address is your user name.

\* Email Address

\* Confirm Email Address

Country US

Postal Code

[Don't know](#)

Phone   Ext.

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

IVR Access Code

[Oracle\\_TNC](#)  
Read and accept the terms and conditions before proceeding

[Register](#)

## Entering Registration Information

Users enter the following registration information.

Page Element	Description
Account Use	Indicates whether this is a personal account or a business account.
Are You a Contractor?	Indicates whether the account holder is a contractor. This switch is visible only if the user selects <b>Business</b> as the account use. The user's contractor status is associated with the business profile that is created during the registration process.  License information is required when a user self-identifies as a contractor. When this switch is set to the on position, the user must click the adjacent <b>Add License</b> button to provide license details.  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 <b>Business</b> as the account use. License information is required if the user self-identifies as a contractor. License information is optional for other businesses.

Page Element	Description
	<p>Clicking this button opens the Contractor License Details page, which includes these fields: <b>License Type, License Number, Issued On, and Expiration Date.</b></p> <p>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 <i>Managing Public User Accounts</i>.</p> <p><b>Note:</b> Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.</p>
<p><b>Hide my contact information from public view</b></p>	<p>Gives the user the option to hide their name and contact information when a member of the public views the user's applications.</p> <p>This question appears only if it is enabled on the Public User Setup page.</p> <p>The default answer to this question is <i>No</i>.</p> <p>Users can access help for this question by clicking the question mark icon adjacent to the question. The help explains that even when the user's own information is hidden, the property addresses for all applications are visible to the public.</p>
<p><b>First Name and Last Name</b></p>	<p>The user's name, which appears on the account profile.</p>
<p><b>Business Name</b></p>	<p>This field is visible only if the <b>Account Use</b> field indicates that this is a business account. The business name entered here is associated with the profile that the registration process creates.</p>
<p><b>Email Address and Confirm Email Address</b></p>	<p>The user's email address that will be associated with their account. Enter the email address again to confirm.</p> <p><b>Note:</b> The user's email address is their user name or user ID. There is no separate user name or user ID to sign in.</p> <p>After the user submits registration information, the system sends an email to this address. The email contains a link that the user needs in order to complete the registration process.</p>
<p><b>Address Fields</b></p>	<p>The user's address that will be associated with their account.</p> <p>The <b>Country</b> field displays <i>US</i>.</p> <p>As the user enters a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After the user selects a value, the city and state appear as read-only fields, and two address fields appear so that the user can enter the rest of the address.</p> <p>A user who doesn't know the postal code can click the <b>Don't know</b> link to display a full set of address fields.</p>
<p><b>IVR Access Code</b> (Interactive Voice Response Access Code)</p>	<p>A 4-digit PIN that public users enter when accessing permit inspections using the agency's interactive voice response system.</p>

Page Element	Description
	<p>The code is masked on this page, and users will not be able to see this code again even after registration is complete. Users who forget their code can reset it on the account management page. For information about entering a new code after registering, see <a href="#">Managing Public User Accounts</a>.</p> <p>This field appears only if your agency enables IVR access codes on the Public User Setup page. See <a href="#">Setting Up Public Users</a>.</p>
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 Licensing and Permitting 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 Licensing and Permitting 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.

## Overview of Public User Accounts

The public user registration process in Public Sector Licensing and Permitting creates an account that contains general information about the account and profile information related to the user.

Agency staff with appropriate permissions such as system administrators can view and manage account- and profile-related information on the Manage Accounts page and registered public users can manage their own information.

### Account and Profile Data

Account information includes the following:

- **Name:** the name of the person who owns the account.
- **Access:** the email address that is entered during the registration process. This email address is used to log into the service. The user's interactive voice response (IVR) PIN for accessing inspection schedules is available if the agency requires an access code.
- **Additional Information:** whether the user's contact information is hidden from public view.  
Your agency configures whether to give users these options:
- **Attachments:** documents that have been uploaded to the account.  
Attachments can be added to either the account or the applicant's profile. The list of attachments for the account displays both account attachments and profile attachments.
- **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 applied to either the account or the applicant's profile. The list of conditions for the account displays only the account-level conditions.

The account profile contains additional information related to the applicant, including the following:

- **Profile Basics:** the profile name, type, active/inactive status, and its designation as the default profile for the account.
- **Profile Information:** the business name and business type if the profile includes business information.
- **Contact Information:** addresses, email addresses, and phone numbers.
- **Contacts:** people who might be added as contacts for applications that are associated with this person or business.  
When adding contacts to an application, users can quickly pick contacts who are already associated with this person or business rather than having to manually add a new contact.
- **Licenses:** a list of licenses such as contractor licenses, the contractor status, 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 added to either the account or the account profile. The list of attachments for the account displays both account attachments and profile attachments.

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

Conditions can be applied to either the account or the account profile. The list of conditions for the account displays only the account-level conditions.

## Accessing Public User Account Information

Registered public users have self-service access to manage their accounts. Agency staff with appropriate permissions such as system administrators 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, email address, and the number of pending verification requests.

An icon before the user's name indicates that the account or 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 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

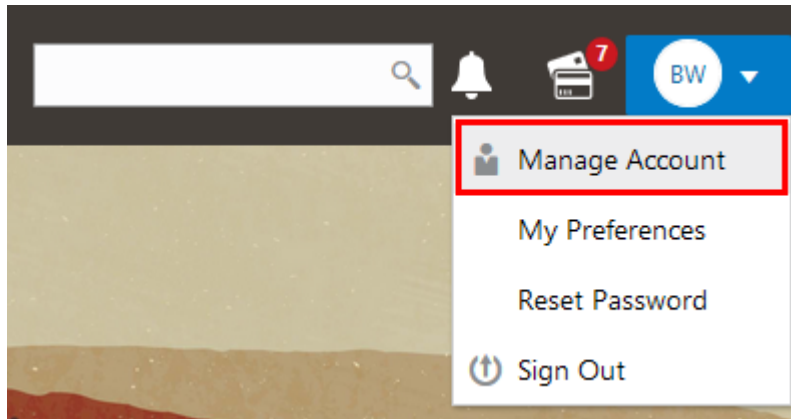
To access self-service account management functionality, a public user who has signed in follows these steps:

1. Sign in to access the registered public user landing page.

2. Click the account menu that appears with the user's initials in the page header.

A drop-down menu appears.

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



3. Select **Manage Account**.

## 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](#).

### Security Details for Managing Public User Accounts

This section describes important security roles, requirements, or considerations specific to managing public user accounts.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public users	Manage their own user accounts.	PSC Registered Public User
PSC Public User Account Management	Manage public sector public user accounts.	PSC System Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## 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 profile. For more information about conditions, see [Managing Account 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 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 the 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 the profile has active conditions, an icon appears next to the profile link. 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 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**, **Display Name** (a read-only value that concatenates the user's first, middle, and last names), **Initials**, **Suffix**, and **Title**.

- c. Click **Save** to save changes and close the page.

4. To view account access information:



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

The Access page appears.

- b. Review the following information:

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

- c. Click **Cancel** to close the page.

- 5. To view or update additional information:

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

The Additional Information page appears.

- b. Review or update the setting to **Hide my contact information from public view**.
- 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 **Close** icon 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 Conditions](#).

- c. Click the **Close** icon 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 the account or the 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 the profile. Use the right frame to view and update details for the selected item.

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

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

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

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

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

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

4. To add a new attachment:

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

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

5. To view or modify attachment information:

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

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

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

You are prompted to confirm the deletion.

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

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

## Viewing the Account Profile

On the Manage Account page, the left frame displays the profile associated with the account.

Selecting the profile name 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.

To view the summary information for the profile:

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

Page Element	Description
<b>Profile Name</b>	The identifying name for the profile. This name appears in the page header and on the Manage Account page.  The name for the profile that is created during the registration process is the public user's first and last name. This name is truncated if it's longer than 60 characters.
<b>Default</b>	The profile that gets created during the registration process is the default profile. The check box is read-only.
<b>Profile Type</b>	Displays either <i>Personal</i> or <i>Business</i> based on the account use selected during registration. You can't change the profile type.
<b>Status</b>	Displays <i>Active</i> to indicate that the account profile is active and can be updated.

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 in the 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 the profile name 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 **View More Details** button 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 account.

To manage contacts:

1. Access the Manage Account page.
2. Select the profile name in the left frame.
3. Click the **Contacts** section to open the Contacts page.
4. If you are adding a contact, click **Add** to open the Contact Details page.
5. If you are updating a contact, click the **View More Details** button at the end of the row to open the Contact Details page.
6. On the Contact Details page, enter the contact's **First Name**, **Middle Name**, **Last Name**, and **Business**.
7. To enter an address, enter the **Postal Code** or click the **Don't know** link to reveal additional address fields, then enter information in those address fields.
8. Enter a **Phone** and **Ext** (extension).
9. Enter an **Email**.
10. Click **Save** or **Cancel** to close the Contact Details page.

Any information you save immediately appears on the Contacts page.

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

**Note:** When applicants 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 to the account profile. When choosing an existing profile contact, the applicant 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 the profile name in the left frame.
3. Click the **Licenses** section to open the Licenses page.
4. Review or update these fields related to the user’s contractor status:

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

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

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

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

- Click **Save** or **Cancel** to return to the Licenses page.
- 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 the 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.

- Access the Manage Account page.
- Select the profile name in the left frame.
- Click the **Trust Accounts** section to open the Trust Accounts page.
- 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.

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

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



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

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

## Managing Account Profile 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 the account or with the account profile. The account-level list includes all attachments.

To manage account profile attachments:

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

Page Element	Description
<b>File Name / Date</b>	The file name of the attachment, and the date that the attachment was added to the account.
<b>Description</b>	A user-supplied description. Users can optionally add a description while adding the attachment.
<b>Category</b>	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.

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

4. To add a new attachment:

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

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

5. To view or modify attachment information:

- a. Click the **Actions** icon and select **View Details**.
- b. On the Attachment 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 Account Profile Conditions

You can access conditions applied to the account profile from the profile summary page. For detailed information about adding and managing conditions, see [Managing Account Conditions](#).

To manage account profile conditions:

1. Access the Manage Account page.

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

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

If the account 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 **Close** icon in the top right corner of the window.

## 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 <a href="#">&gt;</a>
Rita Johnson	Rjohnson	FINARUser1@ap6023fems.us.oracle.com	Yes	2 <a href="#">&gt;</a>
William Harrison Brown	Wbrown	FINARUser1@ap6023fems.us.oracle.com	Yes	1 <a href="#">&gt;</a>

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	<b>License Number</b> 268-953-111 <b>License Type</b> Electrical <b>Issued On</b> 1/1/18 <b>Expiration Date</b> 1/1/20	Pending verification ▼

## 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
<b>Profile Name</b>	Displays the profile that is associated with the data to be verified.
<b>Type</b> (type of request)	Explains what type of information must be verified. Values include: <ul style="list-style-type: none"> <li>○ <i>User is a contractor</i></li> <li>○ <i>User added or updated license</i></li> <li>○ <i>User added or updated trust account</i></li> </ul>
<b>Verification Details</b>	Displays identifying details for a license or trust account.

Page Element	Description
	License details include the license number, license type, the date issued, and the expiration date.  Trust account details include the account number and status.  This column is blank for requests to verify a user's contractor status .
<b>Verification Status</b>	Because this page lists only pending verification requests, all rows initially have the status <i>Pending Verification</i> .

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

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

6. Click the **Save** button.



# 2 Using Common Interface Pages and Elements

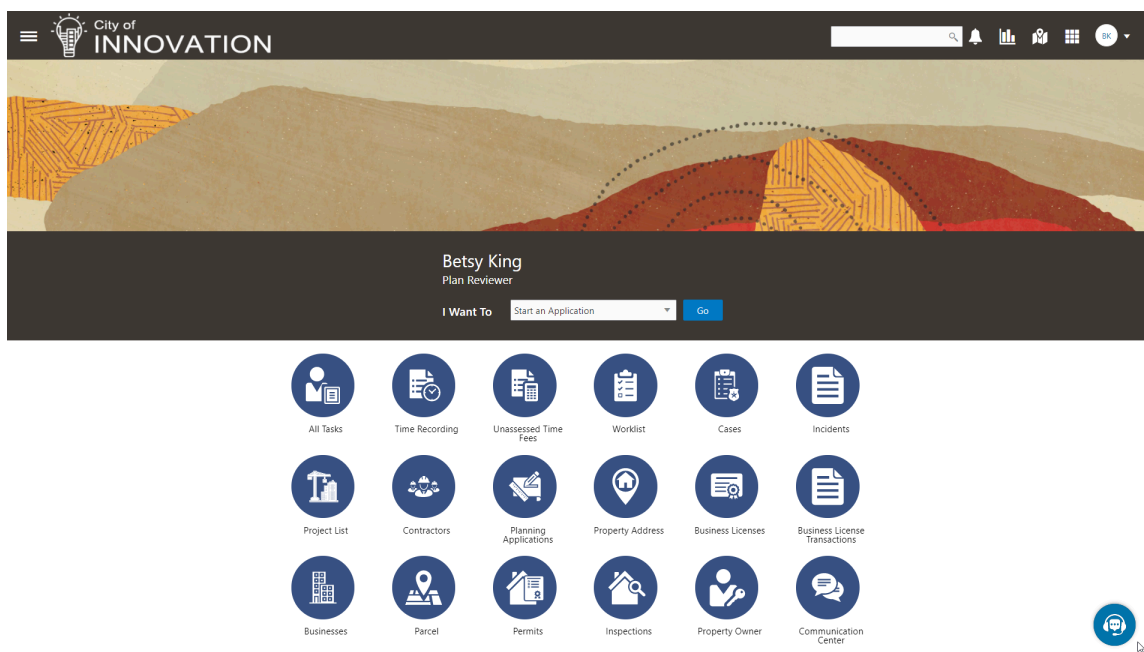
## Using the Agency Springboard

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



Page Element	Description
	<ul style="list-style-type: none"> <li>The Public Hearing map lets you generate hearing notifications by defining an area and generating lists of parcels, owners, and addresses for that area.</li> </ul> <p>If you only have security access to one map, clicking the Maps icon opens that map. If you have access to both maps, clicking the Maps icon opens a menu so you can choose which map to open.</p>
	<p>Click the <b>Page Finder</b> icon to open a pop-up window where you can search pages by their full or partial page name. As you type, the page list is updated to match your criteria. Click any page in the list to access it.</p> <p>The page finder provides a convenient alternative to the hierarchical menu navigation found in the Navigator.</p>
	<p>Your user account is represented by a circle with your initials. Click this icon to access a menu with options for updating your user preferences, changing your password, or signing out. This menu also includes a Help item that provides access to system documentation.</p>

## Alerts

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

## Quick Actions (I Want To)

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

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

Action	Description
<i>Start an Application</i>	Opens the Apply page, where you can chose an application type and start an application. See <i>Choosing an Application Type</i> .
<i>Estimate Fees</i>	Opens the Apply page, where you can chose an application type and estimate fees for your application. See <i>Getting an Online Fee Estimate</i> .
<i>Schedule an Inspection</i>	Opens the Inspection List page, where you can request a permit inspection. See <i>Requesting Inspections</i> .
<i>Report an Issue</i>	Opens the Select an Issue Type page, where you can being the process of reporting a code enforcement issue. See <i>Reporting Issues</i> .
<i>Make CE Payments</i>	Opens the Code Enforcement Payments page, where you can make a payment for a case or citation. See <i>Making Code Enforcement Payments</i> .

## Tiles

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

## Viewing Tasks in the Worklist

The worklist enables agency users to view a list of just the workflow tasks assigned to them.

The tabs displayed in the worklist depend on the agency user's role. For example, a plan reviewer will see the Plan Reviews tabs with their assigned plan reviews, and an inspector will see the Inspections tabs with their assigned inspections, and so on. General tabs include Incoming Tasks and My Tasks.

1. On the agency springboard, select the **Worklist** tile.

If you're a code technician using the Code Enforcement offering, click the **Code Technician Worklist** tile. If you're a planner using the Planning and Zoning offering, click the **Planner Worklist**.

2. On the Worklist, select the tab that lists the tasks that you want to review.
3. Click a task in the list to open the transaction details.

Clicking the **View More Details** button for a task on the Incoming Tasks and My Tasks tabs takes you to the Workflow page in the transaction details, where you can manually advance the workflow. For more information, see [Using Workflow](#).

For information about the common elements found on worklists, see [Using Grids](#).

### Related Topics

- [Using the Code Technician Worklist](#)
- [Using the Planner Worklist](#)

## Using Grids

Common grid controls in Oracle Public Sector Permitting and Licensing enable public and agency users to perform actions and manage how they display data. Using the controls on grids, you can search, sort, filter, and export data, change views, and more. Some grids may be displayed in an expanded format depending on your agency's implementation.

You'll see common grid controls on a variety of pages, including worklists and pages that list records, such as business license transactions, cases, contractors, inspections, parcels, permit and planning transactions, and plan reviews. Transaction detail pages in the different offerings, such as the Inspection List and Fees and Payments pages in the permit application details, also provide common grid controls.










Depending on your agency's implementation, grids may be displayed in a condensed or expanded format. These grid formats determine which controls are available:

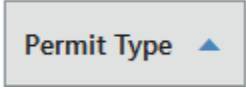



- *Condensed* - Displays multiple data elements in a single column. This is the default format for public users.
- *Expanded* - Displays only one data element per column and provides user-level personalization options. This format and personalization options are only for agency staff.

For more information about personalizing expanded grids, see [Personalizing Grid Displays](#).

## Common Grid Controls

The grid controls shown here are available on both condensed and expanded grids, unless indicated in the usage.

Control	Usage
	Click to download the list of records in a CSV file format. The downloaded file displays all visible fields in separate columns.
	Click to view check boxes for selecting multiple rows before performing an action.
 Show All Statuses   Show All Cycles	Some grids may have additional options available to control data displayed in a grid. For example, the <b>Show All Statuses</b> switch is available on the Transactions page and the <b>Show All Cycles</b> switch is available on the Plan Reviews page.
	Search by alphanumeric characters on the fields that are displayed on the page.  All visible fields in the grid are searchable.  When you search on dates, use this format: MM/DD/YYYY.
	Click the filter button to open the filter options, where you can define, modify, and save your own filters. The <b>Filter By</b> panel opens and you can select from the various advanced filter options to refine your search. All visible fields in the grid can be filtered.  See the "Using the Advanced Filter" section in this topic for more information about the <b>Filter By</b> panel.
	Click the List View button to view the records in a list.
	Click the Sort button, available only in the list view in the condensed grid format, to select the field by which you want to sort the rows. The available sort fields depend on the fields in the grid.  When you first select a field to sort, the sorted rows appear in ascending order. To view sorted rows in descending order, click the sort icon next to the selected field again. Click the sort icon again to return to the original sort order.  In the condensed grid format, the sort appears on each column.
	Click the Grid View button to view the records in a grid.

Control	Usage
	<p>Click the arrow icon on columns in grid view to sort alphanumerically by fields displayed in the column. If the column displays only one field, click the arrow icon to sort based on the field value. If the column displays multiple fields, click the arrow icon in the column heading to show a list of fields that are sortable, then select the field you want to sort by.</p> <p>The initial sort displays records in ascending order. Select the same sort again to show records in descending order, and once again to return to the original order.</p> <p>The location or property information column also uses sorting logic that accounts for the street name followed by the street number.</p>
	<p>View the inventory of records on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See <a href="#">Viewing Map Markers</a>.</p>
	<p>Click to select the applicable actions for each row.</p>
	<p>Click to view more details about the object in the row. When this button isn't available, you can click the row to open the details page.</p>

## Personalizing Grid Displays

Agency staff can personalize expanded grids to suit their own preferences for working more effectively.


The display settings enable each user to:

- Search columns by name
- Wrap text in columns
- Freeze specific columns
- Show or hide columns
- Rearrange column order
- Reset to the default settings

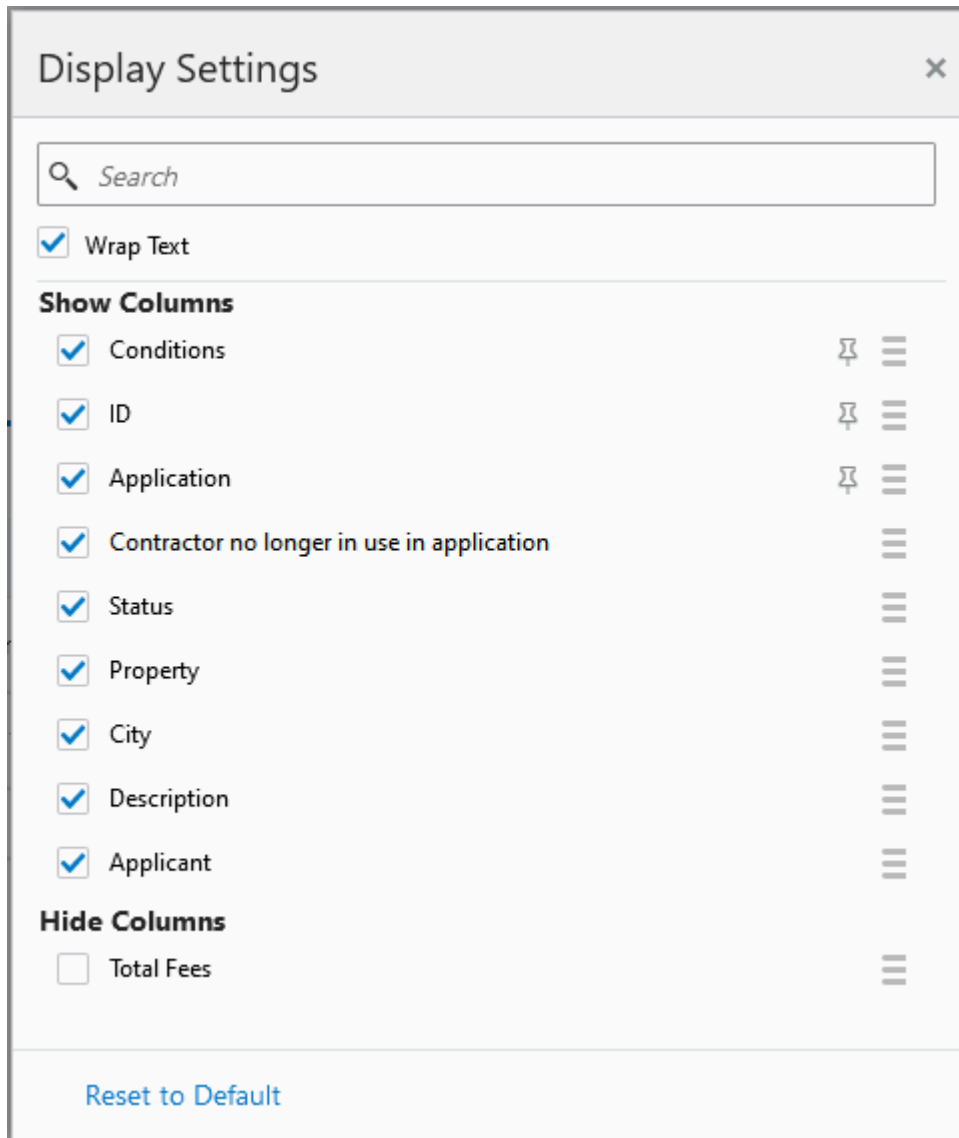
You can only personalize the display on expanded grids. Once you make the changes, your settings are saved on the page. You can adjust the column width in both condensed and expanded grids, but the changes are only saved on expanded grids.

For more information about expanded and condensed grid formats and controls, see [Using Grids](#).

To personalize an expanded grid:

1. Click the **Display Settings** button above the grid:  .
2. The Display Settings modal page opens.

Example of the Display Settings modal page



Display Settings

Search

Wrap Text

**Show Columns**

- Conditions
- ID
- Application
- Contractor no longer in use in application
- Status
- Property
- City
- Description
- Applicant




**Hide Columns**

- Total Fees

[Reset to Default](#)

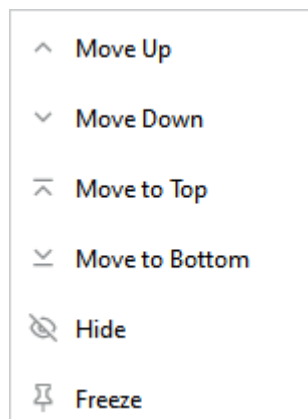
The column names appear in a list, where the top-to-bottom sequence represents the left-to-right display in the grid. For example, the first three column names listed under **Show Columns** will appear as the first three columns on the left in the grid.

3. Adjust the available display settings.

Page Element	Description
<b>Search</b>	Enter text in the search field to search the columns by name.
<b>Wrap Text</b>	Select the check box to wrap the text in the columns.
<b>Show Columns and Hide Columns</b>	Select the check box for a column name to show the column in the grid. When you deselect the check box, the column name row moves into the Hide Columns section.
 (Unfreeze) and  (Freeze)	Click the pin icon to unfreeze or freeze a column. When you freeze a column, it's displayed to the left of columns that aren't frozen.
	Click the icon in the column name row, move the row to a new position, and release.
<b>Reset to Default</b>	Click to restore the original settings.

You can also right-click a column name row to open a menu with row-level actions.

Row-level actions menu on the Display Settings page



Select an action to move, hide, or freeze a column.

4. Click the **Close** button.

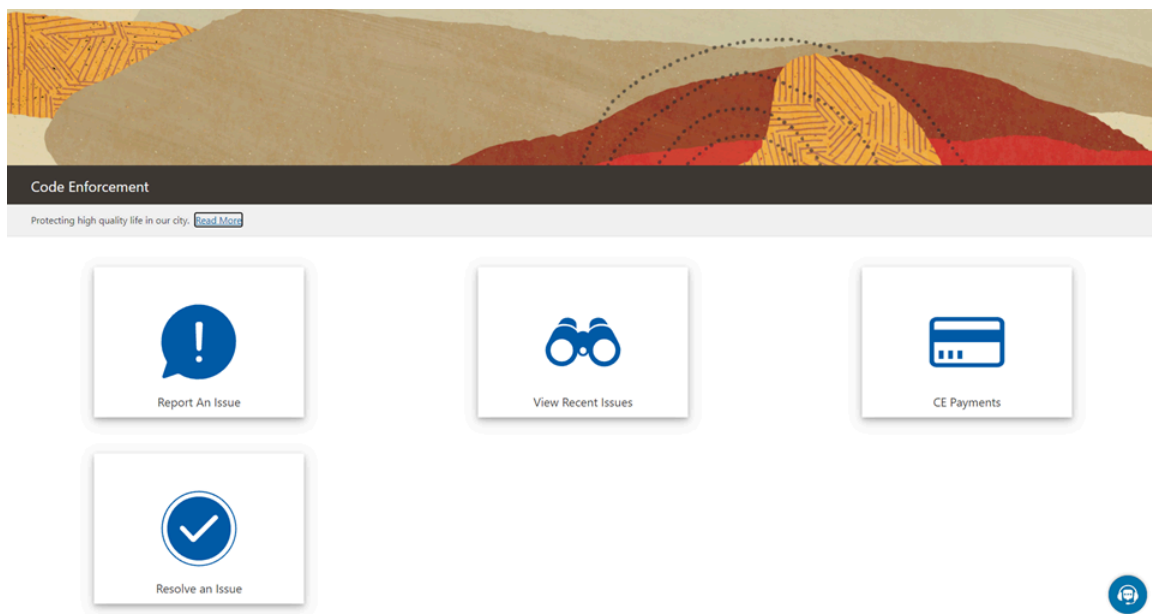
Your display changes are immediately reflected in the grid and saved.

# 3 Code Enforcement Activities for Public Users

## The Public User Landing Page for Code Enforcement

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

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



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

For information on configuring these elements of the welcome banner, see *Setting Up Agency-Level Options for Code Enforcement*.

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

Tile or Button	Who Can Use	Description
Report an Issue	Anonymous and registered users.	Report an issue to the agency. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.  See <i>Reporting Issues</i> .
Track Issues	Registered users.	View status and other information about issues that the user reported while signed in.

Tile or Button	Who Can Use	Description
	This button is visible only after the user signs in.	A user who reports an issue without signing in can't track the issue.  See <a href="#">Tracking Issues</a> .
View Recent Issues	Anonymous and registered users.	View a map with markers that identify the locations of recent issues, or view a searchable list of the issues.  See <a href="#">Viewing Recent Issues</a> .
CE Payments	Registered users.  Anonymous users are prompted to sign in before continuing.	Make an online payment for a code enforcement fees.  See <a href="#">Making Code Enforcement Payments</a> .
Resolve an Issue	Registered users.  Anonymous users are prompted to sign in before continuing.	Claim responsibility for an issue, and perform actions such as viewing notices or appealing a citation.  See <a href="#">Resolving Issues</a> .

## Reporting Issues

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

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

Here is a summary of the issue reporting process:

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

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

After this point, the user navigates through the remaining steps using **Next** and **Previous** buttons. The user can't go back to choose a different issue type or subtype. If the issue wasn't properly classified, the user needs to cancel the report and start again. If an improperly classified report is submitted, agency staff can still assign a new issue type and subtype.

3. On the **Provide the Location of the Issue** step, the user identifies the location using a searchable map.



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

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

- o The user can additionally enter additional details about the location such as an apartment number or directions to a specific location at an address.  
This information is optional if there is an address or location coordinates. When there is no address or location coordinates, additional address details are required.
- o If the location is outside of the agency's boundary, a message instructs the user to change the location to one inside the agency's limits.

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

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

4. On the **Tell Us What's Going On** step, the user describes the issue and optionally attaches photos, videos, audio files, or other attachments.
5. On the **Just a Few More Questions** step, the user answers any additional questions defined by the agency. This step includes a **Does this issue pose a health hazard or public safety risk?** switch to indicate the urgency of the issue. Agencies can add additional questions as well.
6. On the **Provide Contact Information** step, the user verifies their name, email, and phone information or chooses to hide this information.

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

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

7. On the read-only **Review** step, the user reviews all of the issue information.  
To make changes, the user can click the **Edit** button to make the Review page editable or use the **Previous** icon to return to earlier pages.  
**Note:** The user can't change the issue type or subtype after continuing past those steps.
8. The user clicks **Submit**.
9. A confirmation message with the issue number appears.

## Tracking Issues

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

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

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

1. The user clicks the **Track Your Issues** button on the code enforcement landing page. This button is visible only after the user signs in.  
The Issues page appears.
2. The user reviews the following information for the issues on the list:

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

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

The Issues page has these sections:

- A header that displays the incident ID, the issue type and subtype, and the incident status.  
If the incident was reported with the wrong issue type and subtype, and agency staff corrected this information and rerouted the issue, then the original issue gets closed and replaced by a new correctly classified issue. In this situation, the header also displays the message *Rerouted to issue <new incident ID>*.  
The public user doesn't have access to the new incident, which was created by the staff member who rerouted the original incident.
- A map that displays the issue location.
- A Details section that shows the issue address, description, and whether the issue was reporting as posing a health hazard or public safety risk.  
If the person who reported the issue supplied their name, email, and phone, then that information also appears.
- An Attachments section that displays a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
- A History section that displays the incident's status history. This section lists the current and previous statuses, along with the date that the status was applied and, if applicable, the reason for the status change.

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

## Viewing Recent Issues

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

### Overview of Recent Issues

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

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

### Viewing Recent Issues

To view recent issues, public users follow these steps:

1. On the code enforcement landing page, the public user clicks the **View Recent Issues** tile.  
The View Recent Issues page appears in map view.
2. The user can employ the search, zoom, and pan functionality of the map to show a specific area.  
An address search bar appears in one corner of the map. This search centers the map on the specified location and shows markers for all issues in the display area.

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

**3.** Review the issues markers on the map.

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

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

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

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

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

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

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

## Making Code Enforcement Payments

The code enforcement landing page for public users includes an option for paying fees associated with a case or citation.

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

To pay fees associated with case, a public user follows these steps:

- 1.** On the code enforcement landing page, the user clicks the **CE Payments** tile.
- 2.** The user signs in if prompted.
- 3.** On the Code Enforcement Payments page the user selects one of the options to pay:
  - Case
  - Citation

- 4.** The user enters the ID of the case or citation and clicks the **Search** button.
- 5.** The page shows the total amount due. The user clicks the **Pay** button.

**Note:** You can't pay for items in progress or with no balance.

- 6.** On the **Checkout** page, the user selects a payment method and follows the instructions to complete the payment.

- Once the payment is successful, a confirmation message appears. The fee details are updated in the Fees and Payments page in the case details. Agency staff can view the updated fee details in the Fees and Payments page from the case details. See *Working with Code Enforcement Fees and Payments*.

## Resolving Issues

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

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

## Requesting Access

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

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

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

Page Element	Description
<b>Case ID</b>	Enter the identifier of the case as displayed in the notice.
<b>Access Number</b>	Enter the unique number associated to the specific case, provided by the agency.
<b>Contact Type</b>	Select the type of contact from the options.
<b>Phone</b>	Enter the phone number in the format set up.
<b>Email</b>	Enter your email ID.
<b>Additional Information</b>	Enter any detail, such as a reason for requesting access to the case.

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

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

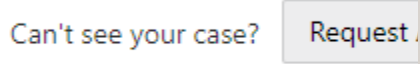

**Note:** Agency staff decide the type of access they should issue to the requestor. Access types determine the level of control the registered users have on their cases.

## Resolving Issues

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

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

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

Page Element	Description
	<p>Select to request access to a case. See the previous section for more information.</p>
	<p><i>Card View:</i> View the cases one at a time displayed on a card format. Slide the card to the left or right to view the previous or next case in the list. This is the default view of the user’s case list.</p> <p><i>List View:</i> View all the cases in a list format.</p> <p><b>Tip:</b> In the list view, you can use the <b>Filter By</b> and <b>Sort By</b> options to refine your case search.</p>
<b>Case status and alerts</b>	View the current status of the case. Alerts are shown when the responsible party’s attention is needed. For example, Comply by <date>.
<b>Issue type and subtype</b>	View the issue type and subtype to which the case belongs.
<b>Case ID</b>	View the identifier of the case that was generated at the time of case creation.
<b>Address</b>	View the address of the location associated to the issue.
<b>Description</b>	View detailed information about the issue recorded at the time of case creation.
<b>Created On</b>	View the date of case creation.
<b>Code Officer</b>	View the name of the code enforcement officer inspecting the case.

Page Element	Description

A grid on the right of the card shows the actions available for the responsible party, which are dependent on the status and timelines of the case:

Page Element	Description
<b>Pay</b>	<p>Review the total payable amount and the amount paid displaying below the <b>Pay</b> link.</p> <p>Click the link to open the Checkout page and pay the due fees associated with the case.</p> <p><b>Note:</b> In the list view, the payment option is available in the <b>Actions</b> menu.</p> <p>For details, see <i>Making Code Enforcement Payments</i>.</p>
<b>View Notice</b>	<p>Click the link to open the notice in a format that is set up by your agency. If there are two or more notices for the case, you can select from the list that appears when you click the link.</p> <p><b>Note:</b> In the list view, the appeal option is available in the Actions menu.</p>
<b>Ready for Inspection</b>	<p>Turn on the switch if your case is ready for the inspection before the compliance date. Choose this option after you have applied all corrective actions related to the violation. The agency will be notified about your early inspection readiness.</p>
<b>Appeal</b>	<p>Click the link to submit an appeal for the issued violation or citation. On the Appeal page, enter a reason for appeal and click <b>Save and Continue</b>. Use the Appeal Attachments page to add any attachments and submit the appeal using the <b>Submit</b> button. The agency staff related to the case can view and download the attachment.</p> <p>The period in which an appeal can be submitted is determined by the time rules set up by your agency. See <i>Setting Up Time Rules</i>.</p> <p>A text indicates the last date for requesting the appeal. Once the appeal is submitted, the text shows the date on which the appeal was submitted.</p> <p><b>Note:</b> In the list view, the appeal option is available in the <b>Actions</b> menu.</p>





# 4 Overview of Working With Incidents And Cases

## The Issue Lifecycle

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

### Incidents, Cases, and Issues

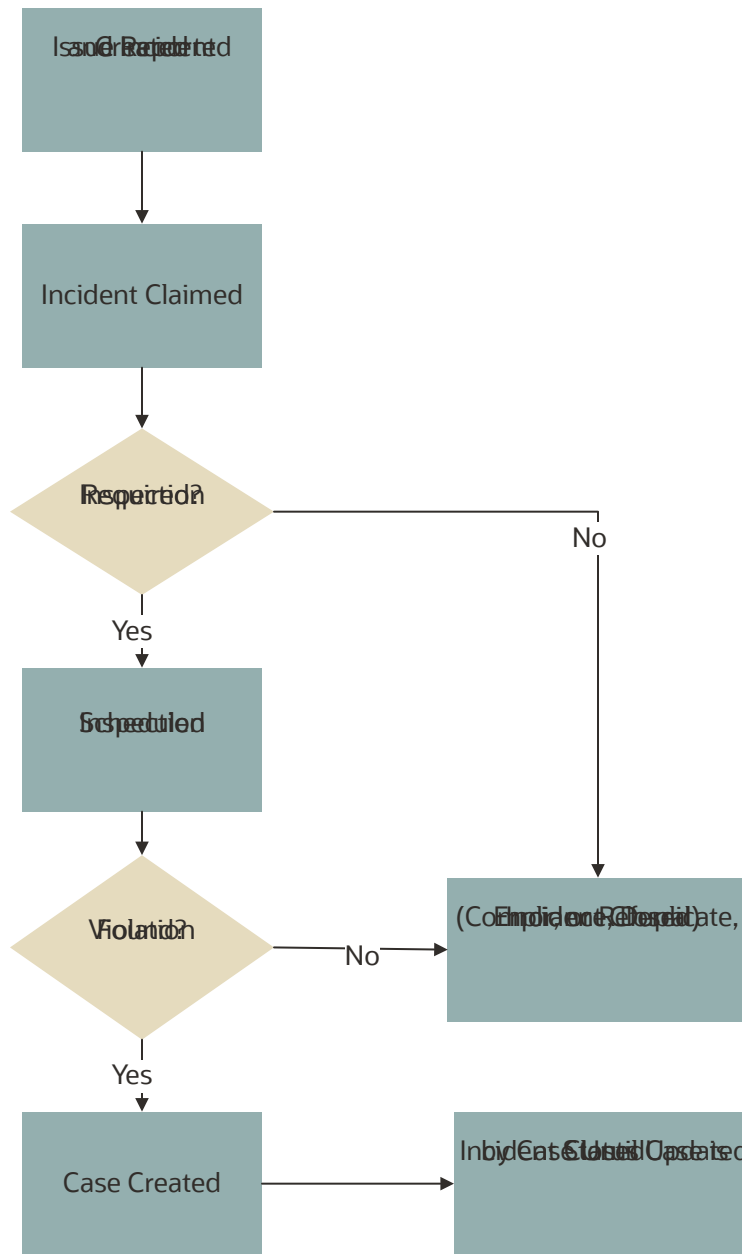
This table explains the different terms that apply to a reported problem.

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

### Incident and Case Process Flow

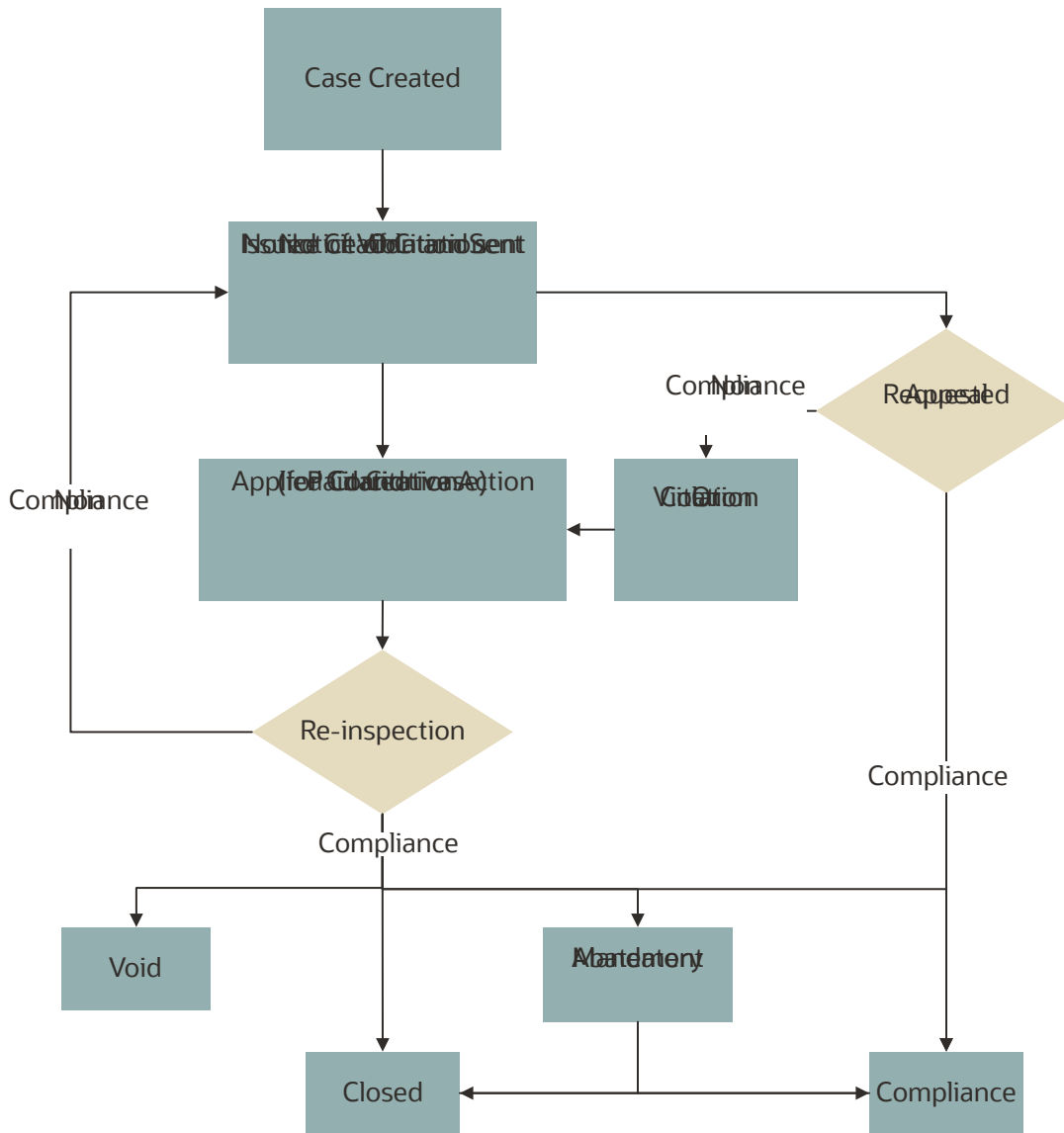
Incidents and cases have their own distinct process flows as illustrated below. Not all issues go through all of these events, but the diagrams provide a general outline of the issue lifecycle.

This diagram illustrates the lifecycle of an incident.



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

This diagram illustrates the lifecycle of a case.



## Time Rules and the Issue Lifecycle

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

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

## Reporting an Issue

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

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

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

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

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

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

## Claiming an Incident

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

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

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

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

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

## Reviewing and Processing an Incident

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

Technicians have these options for processing incidents:

- Schedule an inspection to determine if a violation has occurred.  
The technician chooses a date and a code enforcement officer for the inspection.
- Mark the incident as a duplicate of either another incident or a case.  
Technicians can search existing incidents and cases to see if the issue was already reported.
- Close the incident and provide a reason.  
Incidents are closed when they are in compliance, invalid, or when they are referred to another agency to handle the issue.
- Reassign the incident to a different technician.

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

## Inspecting the Incident

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

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

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

## Creating a Case

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

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

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

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

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

## Issuing a Notice of Violation

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

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

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

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

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

## Issuing a Notice of Citation

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

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

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

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

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

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

## Managing Appeals

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

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

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

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

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

## Making CE Payments

You can make payments on behalf of a responsible party using one of the following methods:

- The code enforcement landing page includes an option for paying fees associated with a case or citation.
- The **Pay** button on the Fee and Payments page. For details, see the section *Viewing and Making Payments for a Case* in the topic [Working with Code Enforcement Fees and Payments](#).

To pay a fee amount from the landing page:

1. On the code enforcement landing page, use the *I want to* option and select **Make CE Payments**.
2. On the Code Enforcement Payments page select one of the options to pay:

- o Case
  - o Citation
3. Enter the ID of the case or citation and click the **Search** button.
  4. The page shows the total amount due. Click the **Pay** button.

**Note:** You can't pay for items in progress or with no balance.

5. On the **Checkout** page, select a payment method and follow the instructions to complete the payment.
6. Once the payment is successful, a confirmation message appears. The fee details are updated in the Fees and Payments page in the case details.

See *Working with Code Enforcement Fees and Payments*.

## Incident and Case Status Updates

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

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

## Using the Code Technician Worklist

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

### Security Details for Using the Code Technician Worklist

This section describes important security roles, requirements, or considerations specific to using the code technician worklist.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Technician	Access the Code Enforcement Technician Worklist to review and act on pending tasks on cases assigned to themselves.	PSC Code Enforcement Technician

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## Accessing and Using the Worklist

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

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

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

The code technician worklist has the following tabs:

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



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

Tab	Displays	Available Actions	Additional Information
Hearings	Cases that have requested appeals or hearings in <i>Scheduled</i> status.	<ul style="list-style-type: none"> <li>View and download attachments added by responsible party</li> <li>Add or delete your own attachments</li> <li>Update Hearing Decision</li> <li>Reschedule Hearing</li> <li>Cancel</li> </ul>	For details about appeals and hearings, see <i>Working with Appeals and Hearings</i> .
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	Assign	<p>When you are assigning a case, the Assign Technician page lists only the technicians that are associated with the issue type and subtype of this case. Select the <b>Show All Technicians</b> check box to list all the technicians.</p> <p><b>Note:</b> This check box is available to agency staff with appropriate permissions.</p> <p>You can also assign cases from the case Overview page. See <i>Viewing the Case Detail Overview</i>.</p>
Access Requests	Cases that have pending requests from registered public users who have asked for online access to the case.	<ul style="list-style-type: none"> <li>Allow Access</li> <li>Deny Access</li> </ul> <p><b>Note:</b> An email notification is sent to the registered user about the request approval or denial.</p> <p>For details, see <i>Adding Responsible Parties</i></p>	<p>Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.</p> <p>Users can't access their case if the agency denies their request.</p>
Cases	All active cases assigned to the logged in technician.	Update Status	<p>Status options:</p> <ul style="list-style-type: none"> <li>Violation</li> <li>Closed</li> <li>Compliance</li> <li>Void</li> <li>Mandatory Abatement</li> <li>Legal</li> </ul> <p>Once the status of a case changes to <i>Compliance</i>, it is removed from the list.</p>

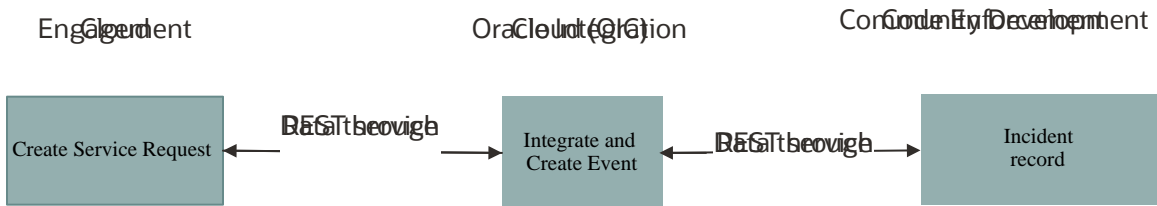
Tab	Displays	Available Actions	Additional Information
Incoming tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in technician or the technician group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: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

## Using Third-Party Integration for Incident Intake

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

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

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



## Create Service Request

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

## Integration

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

## Access Intake Records

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

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

### *Related Topics*

- [Working with Incident Details](#)



# 5 Managing Incidents

## Security Details for Managing Incidents

This topic describes important security roles, requirements, or considerations specific to managing incidents.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Code Enforcement Incident Inquiry	View Incident detail.	PSC Agency Staff - All agency users
PSC Code Enforcement Incident Management	Manage code enforcement incident details.	PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician
PSC System Administrator	Administer Code Enforcement incidents.	PSC System Administrator
PSC Update Incident Comments Added by Others and Self	Update incident comments added by others and themselves.	PSC System Administrator
PSC Delete Incident Comments Added by Others and Self	Delete incident comments added by others and themselves.	PSC System Administrator
PSC Update Incident Attachments Added by Others and Self	Update incident comments added by others and themselves.	PSC System Administrator
PSC Delete Incident Attachments Added by Others and Self	Delete incident attachments added by others and themselves.	PSC System Administrator

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## Reviewing Incident Lists

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

## Reviewing Incidents on the Code Technician Worklist

To review incident details on the code technician worklist:

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

Page Element	Description
<b>Incident</b>	<p>This column displays:</p> <ul style="list-style-type: none"> <li>○ The incident ID that is assigned based on the agency's autonumbering rules.</li> <li>○ The incident type and subtype, separated by a hyphen.</li> <li>○ The incident status. Unclaimed incidents have a status of <i>Reported</i>.</li> <li>○ The date on which the incident was reported.</li> </ul>
<b>Location</b>	<p>Displays the incident address and the incident's district type and district.</p> <p>If district information is missing, a warning icon appears in its place.</p> <p>You can use the map to update the missing latitude and longitude information.</p>
<b>Issue</b>	<p>Displays the incident description.</p>
<b>Assigned</b>	<p>Displays the name of the technician or code officer to whom the incident is assigned.</p>
<b>Due By</b>	<p>Displays the date by which the review and processing must be complete. (Processing can be scheduling an inspection, marking the incident as a duplicate, or closing the incident.)</p> <p>If processing is already overdue, a warning icon appears next to the date.</p> <p>The due date is calculated based on your agency's time rules and the date that the incident was submitted.</p>
<b>Attachments</b>	<p>Click the attachments icon to open a window with an carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).</p>
<b>Actions</b>	<p>Click the Actions icon to quickly complete the following actions:</p> <ul style="list-style-type: none"> <li>○ Schedule Inspection</li> <li>○ Mark as Duplicate</li> <li>○ Reassign</li> </ul>



Page Element	Description
	<ul style="list-style-type: none"> <li>○ Release</li> <li>○ Reroute Incident</li> <li>○ Close</li> </ul>

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

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

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

## Reviewing Incidents in the Main Incident List

To review incident details on the main incident list:

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

Page Element	Description
<b>Show All Types</b>	<p>This switch is visible to code enforcement technicians and supervisors when automatic routing is enabled.</p> <p>When the switch is off, these users see only their assigned incidents and other incidents in their area of responsibility, as determined by the issue types and subtype attributes for their job function.</p> <p>When the switch is on, the users can see all incidents, regardless of their area of responsibility.</p>
<b>Show All Statuses</b>	<p>This switch is visible to code enforcement technicians and supervisors irrespective of whether automatic routing is enabled or not.</p> <p>By default, this switch is turned off, and the list shows only the incidents in the <i>Reported</i>, <i>Inspection</i>, <i>Violation</i> statuses. Turn the switch on to show all incidents including those in the <i>Closed</i> or <i>Void</i> statuses.</p>

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

Page Element	Description
<b>Incident ID</b>	<p>This column displays:</p> <ul style="list-style-type: none"> <li>○ The incident ID that is assigned based on the agency's autonumbering rules.</li> <li>○ The incident type and subtype, separated by a hyphen.</li> <li>○ The incident status. Unclaimed incidents have a status of <i>Reported</i>.</li> </ul>

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

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

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

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

## Claiming and Assigning Incidents

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

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

## Overview of Automatic Routing

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

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

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

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

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

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

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

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

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

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

## Claiming an Incident

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

To claim an incident:

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

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

- o If automatic routing is off, this tab displays all unclaimed incidents.
- o If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.

2. Optionally select the **Overdue** or **Priority** subtab to filter the list of incoming incidents.

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

3. Click the **Claim** button to claim an incident.

Claiming an incident makes you the assigned technician. As the assigned technician, you are now responsible for processing the incident.

## Assigning an Incident

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

To assign an incident:

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

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

- o If automatic routing is off, this tab displays all unclaimed incidents.
- o If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.

2. Optionally select a subtab to further filter the list of incoming incidents:

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

3. Click the **Assign** button.

The Assign a Technician window opens.

4. Use these fields to review the list of technicians:

Page Element	Description
<b>Show All Technicians</b>	<p>This check box appears only if automatic routing is on. Select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype.</p> <p>If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.</p>

Page Element	Description
<b>Name</b>	Displays the names of available technicians.
<b>Incidents</b>	Displays the number of open incidents that the code technician is currently assigned to.

5. Select a technician by clicking the row with the technician’s name.
6. Click **Save**.  
This assignment occurs immediately, and the incident disappears from the Incoming Incidents tab.

## Processing Incidents

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

The following actions are available for processing incidents:

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

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

**Note:** The **Incidents** tab of the code technician worklist displays the same incident information as the other incident-related worklist tabs.

## Accessing Incident Actions from the Worklist

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

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

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

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

A drop-down list of actions appears.

## Accessing Incident Actions from the Incident Details

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

You have two options for accessing incident details:

To access incident details via the code technician worklist:

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

To access incident details via the Incidents list:

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

## Scheduling an Inspection When Autoassignment is Active

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

To schedule an inspection when autoassignment is active:

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

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

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

## Scheduling an Inspection Manually

To schedule an inspection manually:

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

The Schedule an Inspection window opens.

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

Page Element	Description
<b>Priority</b>	Indicates whether the incident has been marked as a priority. The incident priority can affect the due date calculation.
<b>Due Date</b>	Displays the date by which the inspection should be completed. The inspection due date is determined by the time-based rules for the associated issue subtype. These rules are based on the incident submission date and whether the incident is marked as a priority.
<b>District Type</b>	Displays the incident's district type, which is inherited from the issue subtype.
<b>District</b>	Displays the incident's district, which is based on the district type and the incident location.  The default list of available code officers consists of the code officers who are assigned to this district.

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

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

5. Review any existing comments.

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

6. Optionally add additional comments:

a. Click **Add Comment**.

b. In the Add Comment window, enter your comment in the rich text field.

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

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

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

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

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

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

If no inspectors are available, change the inspection date.

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

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

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

## Checking for Duplicates and Marking an Incident as a Duplicate

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

1. Access the **Actions** menu for an incident.
2. Select **Mark as Duplicate** from the menu.

The Check for Duplicate window opens. The **Selected Incident** section at the top of the window displays the incident ID, issue type, issue subtype, and address for the incident that you are marking as a duplicate.

3. Click the **Cases** and **Incidents** links to view initial lists of possible duplicates

The search that is performed when you open the page shows active incidents and cases that match the issue subtype and location of the selected incident. Cases and incidents appear in separate lists that appear when you click the corresponding links.

The search results show the case or incident ID, the issue type and subtype, the status, the address, and the reported date.

4. Optionally enter your own search criteria and click **Search** to look for other cases or incidents that the selected incident duplicates.
5. Select the check box for an incident or case that the selected incident duplicates.
6. Click **Mark as Duplicate**, then click **OK** in the confirmation message window.

The original incident status changes to **Closed** with a reason of *Duplicate*. The related issue information is saved so that the Incident detail page for the newly marked duplicate shows which incident or case was duplicated.

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

## Reassigning an Incident to Another Technician

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

To reassign an incident to another technician:

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

The Reassign Technician window opens. The **Technician Assigned** field displays the name of the current assignee.



3. In the **Select to Change** area, use these fields to review the list of technicians:

Page Element	Description
<b>Show All Technicians</b>	This check box is available to supervisors (but not to technicians) when automatic routing is on. Supervisors can select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype.  If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.
<b>Name</b>	Displays the names of available technicians.
<b>Incidents</b>	Displays the number of open incidents that the code technician is currently assigned to.

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

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

## Releasing an Incident

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

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

To release an incident:

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

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

## Rerouting an Incident

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

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

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

When the new incident is created:

- Information from fields that are common to all incidents gets copied to the new incident. This includes the location, the description, whether the issue is a public safety risk, and the name and contact information (if any) from the original incident.
- Data in the original incident's custom fields are not copied.
- You can review and edit the new incident information before submitting it. Use this option to add information in any custom fields for the new incident subtype.
- The agency user who reroutes the incident becomes the creator of the new incident. If a public user was signed in while creating the original incident, the user can see the incident using the **Track Your Issues** option. After rerouting, however, the new incident is not associated with the original public user account, and it's not included in the user's issue list. The public user can see that the original issue was closed, and the issue details provide the new issue number.

To reroute an incident:

1. Access the **Actions** menu for an incident.
2. Select **Reroute Incident** from the menu.  
The Reroute Incident window opens.
3. Enter the corrected **Issue Type** and **Issue Subtype**.  
You must change at least one value before you can continue.
4. Click **Continue**.  
The Review page appears.
5. Review the information for the new incident.
6. If you need to add or change information for the new incident:
  - a. Click **Edit** on the review page to make the fields editable.
  - b. Make your changes.
  - c. Click **Done** to return to the review page.
7. Click **Submit**.  
The original incident is closed with the reason *Rerouted*, and a new incident is created. A confirmation message provides the ID of the new incident.  
If automatic routing is active, the new incident is routed to the appropriate code technicians. Otherwise, the new incident goes into the general pool of unassigned incidents.

## Closing an Incident Manually

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

To close an incident:

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

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

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

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

To add new comments:

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

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

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

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

5. Click **Save**.

The incident status changes to **Closed**.

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

## Working with Incident Details

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

### Accessing Incident Details

To access incident details from the code technician worklist:

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

To access incident details from the Incidents list:

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

## Using the Incident Overview Tab

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

To use the Overview tab:

1. Access the incident.

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

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

The following table describes incidents statuses and reasons:

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

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

These fields are visible when relevant:

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

4. Review the following general incident information:

Page Element	Description
<b>Priority</b>	Displays <i>Yes</i> or <i>No</i> to indicate whether the incident is a priority issue.  The initial value corresponds to the how the person who reported the incident answered the question <b>Does this issue pose a health hazard or public safety risk.</b>  If the incident has been claimed and it is in <i>Reported</i> status, the assigned technician can click the adjacent <b>Edit</b> link to change the incident priority.
<b>Issue Description</b>	Displays a description of the problem that was reported.


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

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

Page Element	Description
<b>District Type ID</b>	<p>Identifies the code enforcement district type for the incident. For example, incidents might be associated with a fire prevention district type.</p> <p>The district type is inherited from the issue subtype and is read-only. However, if the field is blank because the issue subtype doesn't have a district type, you can manually select one. The field becomes read-only after you enter a value.</p>
<b>District</b>	Confirm or update the specific district where the incident is located. This district is based on the district type and the issue location:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type.</li> <li>○ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel.</li> <li>○ If the system is unable to determine the district, you can manually enter one.</li> </ul> <p>The district determines the default code officers for the incident. For example, if an incident is in fire prevention district 2, then the code officers who are assigned to that district are listed when you schedule an inspection.</p> <p>Code officers are assigned to specific districts using the <i>Code Enforcement Districts</i> attribute of the <i>Code Enforcement Officer</i> job function.</p> <p>For more information about setting job function attributes, see <a href="#">Setting Up Agency Staff</a>.</p>

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

Page Element	Description
<b>Technician Assigned</b>	<p>Identify the code enforcement technician who is responsible for the initial review and processing for the incident.</p> <p>You can update this field directly, or use the <b>Reassign</b> action in the <b>Actions</b> menu.</p>
<b>Code Officer</b>	<p>Identify the code enforcement officer who is responsible for an initial inspection. A code officer is assigned when the inspection is scheduled.</p> <p>This field is editable only if the incident is in the <i>Inspection</i> status. When you change the assignment, the system does not check the new assignee's workload. After you assign the new code officer, the assignment is also updated on the corresponding inspection record.</p>
	<p>Click the icon next to the <b>Technician Assigned</b> or <b>Code Officer</b> fields to open a modal page that lists all the technicians or code officers previously assigned to the incident, with the details of the assignment date and time.</p>

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

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

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

Action	Description
<b>Schedule Inspection</b>	Select the inspection date and the code officer for an incident.
<b>Mark as Duplicate</b>	Identify another issue (an incident or a case) that this incident duplicates. Incidents that are marked as duplicates are closed, and the ID of the related transaction appears on the Overview tab.
<b>Reassign Technician</b>	Choose a new code enforcement technician. This action has the same result as directly editing the <b>Technician Assigned</b> field.
<b>Release</b>	Clear the <b>Technician Assigned</b> field.
<b>Reroute Incident</b>	Provide a new issue type and subtype for the incident. If automatic routing is enabled, the incident is routed based on the new values.
<b>Update Tasks</b>	If the incident is associated with a workflow, use this option to update pending workflow tasks.
<b>Close</b>	Close the incident and specify a reason for the closure.

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

## Using the Workflow Tab

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

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

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

To manage an incident workflow task:

1. Select the **Incidents** tile on the Agency Springboard.
2. Click the row for the incident you want to view.
3. Use the navigation links in the left frame to select **Workflow**.  
The Workflow page appears on the right side of the page.
4. By default, the stage view is displayed. Click the **Milestone View** icon to toggle the view.



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

5. The tasks and task details are laid out in a two-panel view below the stages or the milestone. The two-panel view includes the following:

Panel	Description
Task summary cards on the left.	<p>The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information:</p> <ul style="list-style-type: none"> <li>○ Task name</li> <li>○ Task status</li> </ul>

Panel	Description
	<p>Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always <i>In Progress</i>. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks.</p> <ul style="list-style-type: none"> <li>○ Assignee</li> </ul> <p>Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task.</p> <ul style="list-style-type: none"> <li>○ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.</li> </ul>
Task details on the right.	<p>The right panel displays more details for the task that is selected in the left panel.</p> <p>If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments.</p> <p>Completed tasks are not updatable, but you can add comments to them.</p> <p>The Incident Workflow page has an option to include a form or a checklist in the Task Details panel. This form is customizable by the agency to cater to their specific requirements.</p>

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

For details on using comments and attachments in workflow tasks, see the topic [Using Workflow](#).

## Using the Incident Details Tab

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

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

To use the Details tab:

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

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

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

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

## Working With Incident Comments

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

## Viewing Incident Attachments

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

To view incident attachments:

1. Access the incident.
2. Click **Attachments** in the left panel.
3. Review information for the attachments in the list:  
Attachment information is not labeled, but it consists of the following:
  - o A thumbnail showing an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
  - o File name
  - o File size
  - o File description, if one was entered when the file was uploaded.
  - o Date and time that the attachment was uploaded.
4. To view additional details or update the description:
  - a. Click the **Actions** icon for the row and select **View Details** from the menu.
  - b. Review information in these fields: **File Name, File Size, Uploaded By, and Uploaded On.**
  - c. Review and optionally modify the **Description.**
  - d. Click **Cancel** or, if you updated the description, click **Save**
5. To download a local copy of the file, click the **Actions** icon for the row and select **Download** from the menu.  
The download process is based on your browser. If you're not prompted for a file location, the file is saved to your downloads folder.

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

## Working with Incident Communications

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

## Viewing Incident History

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

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

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

### Related Topics

- [Code Enforcement Workflow Basics](#)

## Working with Incident Communications

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

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

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

## Sending Incident Communications

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

Select an incident on the Incidents page.

Click Communications in the navigation bar.

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

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

Page Elements	Definition
	<p>this message, the status of the incident associated with the message is included in the body text.</p>
<b>Create Web Form</b>	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
<b>Insert Web Form</b>	<p>Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
<b>To</b>	<p>Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message.</p> <p><b>Note:</b> Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p>
<b>Cc and Bcc</b>	<p>Enter the email addresses of the people or organizations that you want to receive a copy of the message.</p> <p><b>Note:</b> These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<b>From</b>	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p><b>Note:</b> Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Alert</i>, <i>Emails and Notifications</i>, and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
<b>Subject</b>	<p>Enter a brief description of the purpose and content of the message.</p> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>

Page Elements	Definition
<b>Message Body</b>	<p>Enter the main body text of the message.</p> <p>For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> display format, you can enter only plain, unformatted text.</p> <p>For the <i>HTML</i> display format, you can enter rich text, links, and images.</p>

4. Click **Send**.

## Communicating Using a Web Form

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

Here's how to create a web form:

1. On the Communication Details page, click **Add**.
2. Enter values for the channel type, such as email or notification, visibility to send to the applicant or agency staff, and the **To**, **From**, and **Subject** fields.
3. Click **Create Web Form**.
4. For each row of the web form, enter the **Question Text** along with the **Answer Type** that you expect from the recipient for that question. You can select from these answer types:

Answer Type	Description
<i>Attachment</i>	<p>Enables the recipient to attach one file per question.</p> <p>After the recipient uploads the file and submits the form, attachments are available in the web form response and on the Attachments page for the application.</p>
<i>Date</i>	Enables the recipient to answer the question using a calendar to indicate the date.
<i>Text</i>	Enables the recipient to enter text in response to a question.
<i>Number</i>	Enables the recipient to enter a numeric value of up to 13 digits and three decimal places.

5. Click **OK** to save your web form questionnaire and return to the Ad Hoc Message page. The **Create Web Form** button displays the number of questions included on the web form in parentheses.
6. Click **Insert Web Form** to insert the web form questions into the body of your message.
7. Click **Send**.

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

## Viewing Incident Communications

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

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

Select an application on the Incidents page.

Click Communications in the navigation bar.

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

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

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

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

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

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



# 6 Managing Inspections

## Security Details for Managing Inspections

This topic describes important security roles, requirements, or considerations specific to managing inspections.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Officer	Access the Code Enforcement Officer Worklist to review and act on pending tasks on inspections and cases assigned to themselves.	PSC Code Enforcement Officer

For more information on creating roles for Public Sector Licensing and Permits, see *Creating Custom Roles for Public Sector Licensing and Permitting*.

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the *Security Reference for Oracle Public Sector Licensing and Permitting*.

## Using the Code Officer Worklist

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




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

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

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

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

The code officer worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Inspections	<p>List of all inspections assigned to the officer.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and code violations.</p> <p> – Indicates that the incident or case is ready for inspection.</p> <p> – Indicates that the case is ready for an early inspection.</p> <p> – Indicates that the date scheduled for the inspection has passed.</p>	<p>List page:</p> <ul style="list-style-type: none"> <li>• Attachments</li> <li>• Comments</li> <li>• Reschedule</li> <li>• Cancel</li> <li>• View Details</li> </ul> <p>Detail page:</p> <ul style="list-style-type: none"> <li>• Update Result: <i>In Compliance, Violation, Referral, Closed</i></li> <li>• Reschedule</li> </ul>	<p>For details about result options, see <i>Submitting Code Enforcement Inspection Results</i>.</p> <p>Submitting the details will create a case with the details provided.</p>
First Inspections	<p>List of all new inspections assigned to the officer.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.</p>	Same as listed above.	See the next section.
Reinspections	<p>List of reinspections. These are the follow-up inspections after the first inspection is complete with a result.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.</p>	Same as listed above.	See the next section.
Today	List of all inspections that are due on the current date	Same as listed above.	
Tomorrow	List of all inspections that are due on the next date.	Same as listed above.	
Ready	List of Inspections related to incidents and cases that have passed their compliance date.	Same as listed above.	
This Week	List of all inspections that are due in the current week.	Same as listed above.	

Tab	Displays	Available Actions	Additional Information
Overdue	List of inspections from cases that have passed their inspection due date.	Same as listed above.	
Incidents	<p>Unprocessed incidents (those in Reported status) where the current user is the assigned code officer.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> <li>• A Report Incident button which provides quick access for the user to report a new incident from the worklist.</li> <li>• A map view for displaying incident locations.</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule Inspection</li> <li>• Mark as Duplicate</li> <li>• Reassign</li> <li>• Release</li> <li>• Reroute Incident</li> <li>• Close</li> </ul>	<p>The actions that are available here are also available from the incident detail page.</p> <p>Completing any of the available actions removes the incident from this tab.</p> <p>The <b>Overdue</b> subtab shows claimed incidents with a due date before the current date.</p> <p>The <b>Priority</b> subtab shows claimed incidents where the Priority switch is enabled.</p>
Notices	<p>List of notices from cases that are assigned to the code officer. Notices include notice of violations and notice of citations.</p> <p>Violation and citation notice object records are created for violations and citations respectively.</p>	<ul style="list-style-type: none"> <li>• Generate</li> <li>• Continue</li> </ul>	<p>The notices are classified in the two subtabs – <b>Notice of Violation</b> and <b>Notice of Citation</b>.</p> <p>The <i>Generate</i> action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page and complete the details and print.</p> <p>The <i>Continue</i> action signifies that the notice is generated, and you can make changes to the details before printing it.</p> <p>Any changes made to the notice process will automatically update the case detail pages.</p> <p>A citation notice additionally contains information about the citation fees.</p>
Hearings	Cases that have requested appeals or hearings in <i>Scheduled</i> status.	<ul style="list-style-type: none"> <li>• View and download attachments added by responsible party</li> <li>• Add or delete your own attachments</li> <li>• Update Hearing Decision</li> <li>• Reschedule Hearing</li> <li>• Cancel</li> </ul>	For details about appeals and hearings, see <i>Working with Appeals and Hearings</i> .
Access Requests	Cases that have pending requests from registered public users who have asked for online access to the case.	<ul style="list-style-type: none"> <li>• Allow Access</li> <li>• Deny Access</li> <li>• Edit Details</li> </ul>	Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.

Tab	Displays	Available Actions	Additional Information
			Users can't access their case if the agency denies their request.
Assigned Cases	<p>List of all the cases assigned to the officer for inspections.</p> <p>Detail pages show the complete details of the case.</p>	<p>List page: <b>Create Case:</b> Create a new case.</p> <p><b>Actions:</b> Select and choose from options <i>Attachments</i>, <i>Comments</i>, and <i>Update Status</i>.</p>	For information about case details, see <i>Processing Cases</i> .
Completed Inspections	<p>List of all inspections with status as <i>Completed</i>.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, code violations, and notices.</p>	None	See the next section.
Incoming Tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in officer or the officer group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> <li>• Claim</li> <li>• Reassign</li> </ul> <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the <b>My Tasks</b> subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> <li>• <b>Update:</b> Change the status, priority, or review and add comments and attachments. The Update Tasks page allows you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes.</li> <li>• <b>Release:</b> Unassign the workflow task from your list. This is available only for My Tasks assignments.</li> <li>• <b>Reassign:</b> Change the assignee of the workflow task. This is available only for My Tasks assignments.</li> </ul> <p>When you reassign a workflow task to another officer, the My Tasks subtab for the assigned officer will list the task. For information on Workflow, see <i>Using Workflow</i>.</p>

## Reviewing Code Enforcement Inspection Details

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

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

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

### Reviewing the Inspection Details

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

Turn on the **Ready for Inspection** switch when the responsible party has requested for an inspection prior to the scheduled inspection date. The inspection status on the Inspections page changes to *Scheduled – Ready*, and the case is ready for the code officer to inspect.

**Note:** This switch is available for edit only when the case has a scheduled inspection for violation or citation, and remains until the compliance date is reached.

You can take the following actions related to your inspection:

- **Update Result:** Click the button to select a result option after the inspection. The options available are based on factors such as, if the inspection is for an incident or a case, if it is the first inspection or reinspection, and the status of the incident or case:
  - In Compliance
  - Not in Compliance: This option is available when you are resulting an inspection for a case in *Appeal*, *Hearing*, or *Legal* status.
  - Violation
  - Referral
  - Closed
  - Void
  - Issue Citation
  - Remains in Violation/Citation
  - Mandatory Abatement
  - Extension

**Note:** When a case is in *Appeal*, *Hearing*, or *Legal* status, the inspection result options are limited to **In Compliance**, **Extension**, and **Not in Compliance**. After you submit the result, a new inspection can be scheduled from the Inspections page. If an inspection is already scheduled, the **Reschedule** option will be available. For details, see *Working with Code Enforcement Inspections*.

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

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

### Compliance Date Calculations based on Inspection Result

Time rules, which are set up by your administrator, determine the compliance date when you submit an inspection result:

- *Violation:* When a case is in violation, the compliance date is calculated from the case creation date.
- *Citation:* The compliance date is calculated from the date you issued the citation.
- *Remains in Violation:* The compliance date is calculated from the inspection completion date.
- *Remains in Citation:* The compliance date is calculated from the inspection completion date.

When a case is created (violation or citation), the compliance date is calculated based on the case creation date. For inspections that are scheduled thereafter, the time rule configured for the compliance due date calculation uses the unit of measure (UOM) value that is associated with the policy occurrence count as the number of days required to comply.

Accordingly, the date of compliance will be calculated by adding the UOM value to the inspection completion date. Appeal due dates are calculated on the same basis.

For example, if the first inspection(Policy Occurrence Count =1) is completed on the 10th of January, and if the policy occurrence count is mapped to a unit of measure value of 5, then the compliance period will be 5 days. The compliance date will be the 15th of January.

The compliance date is updated on the Inspection detail page and on the Case Overview page.

For details on configuring policy occurrence count and UOM, see [Setting Up Time Rules](#)

## Reviewing the Attachments

The Inspection Attachments tab allows you to view and add attachments related to the inspection. For details about attachments, see [Processing Incidents](#).

## Reviewing the Comments

The Inspection Comments tab allows you to view and add comments related to your inspection. For details about comments, see [Processing Incidents](#).


## Reviewing the Code Violations

The Code Violations tab allows you to manage the code violations that were entered at the time of creating the issue and during previous inspections. Expand a code violation record to view the description, corrective actions, and the available actions. Each record shows the status of the code violation:

- **Open** – The status of a newly added code violation.
- **Canceled** – The status of the code violation when the code officer removes the violation record that was added to the case from a previous inspection.
- **Resolved** – The status of the code violation when the code officer resolves the code violation after confirming compliance.

Code officers can add new violations and their corresponding corrective actions for the current inspection. Use the Actions menu that is available for every code violation to take actions such as Resolve, Remove from Case, and Reopen.

Page Element	Description
<b>Add</b> button	Click to open the Select Codes page and add one or more violations. You can select from a list of current and other violations. Click <b>Done</b> after selecting the violation records. The corresponding corrective actions are also added and listed on the Code Enforcement Inspection page.
<b>Resolve</b>	Select the related action to resolve the code violation. A violation is resolved when the responsible party has implemented the corrective actions.
<b>Remove from Case</b>	Select the related action to remove the code violation from the case.

Page Element	Description
	<p><b>Note:</b> If you try to remove the code violation that was added in a previous inspection, the violation will be canceled and not removed from the case. However, if you remove the violation that is added from the current inspection, the record is deleted from the case.</p> <p>Also note that you cannot remove a code violation that is associated with a citation.</p>
<p><b>Reopen</b></p>	<p>Select the related action to reopen the code violation from its resolved or canceled status. This option is not available if the case is in one of the statuses – In Compliance, Closed, or Void.</p>
	<p>Click the icon to open the Violation page and modify the summary or description. You can use the Rich Text formatting options in the description.</p> <p>Clicking the <b>Edit</b> icon for a corrective action will open the Corrective Action page and you can change the text of the corrective action using the Rich Text formatting options.</p> <p>Click <b>Done</b> after making the changes.</p>

## Reviewing the Notices

The Notices tab allows you to manage the notices that are added to after completing inspections. Code officers can add new ad hoc notices for the current inspection using the Add Ad Hoc Notice page.

The Notices page lists all the notices with details of their ID, name, category, count, case status, status, notice creation and sent date. You can view the generated, pending, and canceled notice records. Use the **Actions** menu to view options based on the status of the notice:

- *Generate*: Click to generate the notice and open the report in a separate page of your browser.
- *Cancel*: Click to cancel the notice. This option is available until the notice is generated.
- *Print*: Click to print the notice report, which opens in a separate page of your browser.

To add a notice, click the **Add Notice** button, which opens the Add Notices page. You can use the category filter or search and select a notice from the available ad hoc notices. Click the **Select** button on the notice record to add the notice to the inspection and return to the notices list page.

**Note:** The Notices tab appears only for inspections that are in *Completed* status. You can add a notice even if the case is in *Closed* status.



# 7 Using Oracle Municipal Code Officer

## Security Details For Using Oracle Municipal Code Officer

This topic describes important security roles, requirements, or considerations specific to using Oracle Municipal Code Officer.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Officer	Access Mobile Oracle Municipal Code Officer. Users also need to be registered using the mobile application activation setup.	PSC Code Enforcement Officer
PSC Update Code Enforcement Inspection Comments Added by Others and Self	Update Code Enforcement inspection comments added by others and themselves.	PSC System Administrator
PSC Delete Code Enforcement Inspection Comments Added by Others and Self	Delete Code Enforcement inspection comments added by others and themselves.	PSC System Administrator
PSC Update Code Enforcement Inspection Attachments Added by Others and Self	Update Code Enforcement inspection attachments added by others and themselves.	PSC System Administrator
PSC Delete Code Enforcement Inspection Attachments Added by Others and Self	Delete Code Enforcement inspection attachments added by others and themselves.	PSC System Administrator

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## Overview of Mobile Oracle Municipal Code Officer

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

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

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

## Installing and Configuring Oracle Municipal Code Officer

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

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

### Before You Begin

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

- An agency staff profile  
Make sure that you have an agency staff profile to log into the mobile application. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Agency administrators set up the agency staff profiles.
- Appropriate security  
Agency administrators must explicitly grant mobile application access to you. Use the *Mobile Application Activation* link that you have received from your administrator to access the application. The only role that has access to the mobile application is the code enforcement officer.

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

### Installing Oracle Municipal Code Officer

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

### Configuring the Oracle Municipal Code Officer Environment

To configure Oracle Municipal Code Officer:

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

You must agree to proceed to the next step.

3. The confirmation page appears with the Application Host URL automatically populated. Click the **Get Started** button.
4. As the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.
5. Select the **Save user ID** check box, if desired. The next time you return after logging out, you don't have to reenter your user ID.
6. After your login credentials are successfully authenticated, the setup page appears with a progress bar displaying the progress of the package download.
7. After installation completes, the application home page – Worklist – appears for the current day.

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

## Viewing the Worklist

When you log into the Oracle Municipal Code Officer mobile application, you see a worklist with all your inspection tasks organized in separate tabs.

On the Worklist page, code officers can:

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

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

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

This example illustrates the code officer's view of the Worklist page

The screenshot shows the 'Worklist' application interface. At the top, there is a dark header with a hamburger menu icon on the left, the word 'Worklist' in the center, and a vertical ellipsis icon on the right. Below the header is a summary bar with three cards: a search icon, a card showing '13 Inspections', and two cards showing '3 Ready' and '11 First Inspections'. The main section is titled 'Inspections' and contains three filter icons: a location pin, a funnel, and a double-headed arrow. Below the filters is a list of inspection items. Each item is a card with a colored vertical bar on the left (green for Citation and Inspection, orange for Violation), a title, a date, and a list of details. The first item is a 'Citation' due on Jan 15, with details 'WFSubtypeSingle', '2160 OTIS DR, ALAMEDA, US-CA', and '2nd Inspection'. The second item is an 'Inspection' due on Jan 25, with details 'WFSubtypeSingle', '2207 Santa Clara Ave, Alameda, California', and '1st Inspection'. The third item is a 'Violation' due on Jan 26, with details 'Car Nuisance Subtype', '2111 WHITEHALL PL, ALAMEDA, US-CA', and '1st Inspection'. A fourth item, 'Violation', is partially visible at the bottom with a date of 'Feb 1'. Each item has a three-dot menu icon on the right side.

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

## Opening the Map View

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

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

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

## Reporting a New Violation

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

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

1. On the Worklist page click the **Action** menu and select **New Violation**.

You can also access the New Violation button from the **Action** menu on the Inspection page.

2. Select the type and subtype of the issue you want to report.
3. Use the map page to locate the property for which you are reporting the violation.
4. Enter a description of the issue. You can also attach a photo, video, or an audio file as reference.
5. Enter any additional information, if present.
6. In the **Code Violations** section, click **Add** to open the Select Codes page and include one or more code violations from a list of current or other violations. Each newly added code violation is in Open status. The value is updated whenever the status is updated in the Code Enforcement Inspection – Code Violations page or the Case Code Violations page. See *Using the Code Officer Worklist* and *Working with Code Violations*. The related corrective actions are automatically added to the form. You can modify the descriptions for violations and corrective actions using Rich Text formatting actions, and save.
7. Review the details and submit the form.

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

## Rescheduling an Inspection

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

1. On the Worklist page click the **Action** menu on the inspection you want to reschedule.

You can also swipe the screen to the left on the inspection item.

2. Select **Reschedule**.
3. The Reschedule page displays the due date and the current schedule date of the inspection. Click **Next Schedule Date** and select one of the available dates that show in the calendar.
4. Click **Submit**.

## Working with Code Enforcement Inspection Details


In the Oracle Municipal Code Officer Mobile application, you view inspection details and initiate actions for performing inspections on the Inspection page.




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

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

### Elements on the Inspection Page

You can also perform these actions on the Inspection page:

Page Element	Description
<b>New Violation</b>	Select the option from the <b>Action</b> menu to report a new violation. See the <b>Reporting a New Violation</b> section for more details.
<b>Inspection number, type, and status</b>	View the inspection number, its type, and status such as, Scheduled, Canceled, and Completed.
	View the address of the inspection location. Click the map icon to view the location of the property on a map.  If there are two or more active inspections for the same location, then a link is displayed with a text showing the number of other active inspections. Tap the link to open a modal that lists the details of the remaining inspection items.
Inspection detail	View the date of inspection, the compliance date, the name of the code officer and technician.
<b>Description</b>	View the description of the inspection.
<b>Ready for Inspection</b> switch	Turn on if the responsible party has indicated on the Resolve Issue page that the case is ready for an early inspection. The status of the inspection will change to <i>Scheduled – Ready early</i> . For details, see <a href="#">Resolving Issues</a> .

Page Element	Description
<b>Violations</b>	View a list of violations associated with the case along with their corrective actions. Click Add to add a new code violation and its corrective action.
<b>Inspections</b>	View a list of all previous inspections with the date of inspection and inspection result.
<b>Notices</b>  	<p>View a list of all the ad hoc notices that are added after completing the inspection. To add a new notice click the <b>Add Notice</b> button, which opens the Add Notice modal page. You can use the category filter or search and select a notice from the available ad hoc notices. Click <b>Done</b> to return to the Inspection page.</p> <p><b>Note:</b> This section appears only for inspections in <i>Completed</i> status. Also note that you can add a notice even if the case is in <i>Closed</i> status.</p> <p>Click the <b>Print</b> icon to generate the notice, which opens in a format set up by your agency.</p> <p>Click the <b>Cancel</b> icon to cancel the notice. This option appears until the notice is printed. Once printed, you can't delete the notice.</p>
	Select to list the result options to choose from. Examples include <i>In Compliance</i> , <i>Remains in Violation</i> among others. The options available are based on the status of the incident. See the <b>Submitting Inspection Results</b> section for more details.
<b>Attachments</b>	Select to open the Attachments page to view a list of attachments related to the inspection. You can add a new attachment by selecting the <b>Add</b> button.
<b>Comments</b>	Select to open the Comments page to view a list of comments related to the inspection. You can include an existing comment from standard comments or add a new comment by selecting the <b>Add Comment</b> button.

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

## Submitting Code Enforcement Inspection Results

You submit inspection results to complete an assigned inspection on the Inspection Result page in the Oracle Municipal Code Officer mobile application.

To submit the result of an inspection:

1. Select the inspection you want to submit from the Worklist page.
2. On the Inspection page click **Result Inspection**.
3. Select the desired option from the available list of results.

4. On the result page include the inspection completion date, and comments or attachments, as needed. The fields displayed on the result page are determined by the result option you have selected.
5. On the Review page click **Submit**. An information message appears with an issue number for future reference. Clicking **OK** returns to the Inspection page. To return to the Worklist – Inspections page, click the back button.

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

## Statuses and result options available for an incident

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

## Statuses and result options available for a case

Status at the time of inspection	Result
Violation	<b>In compliance:</b> The status of the case changes to Compliance and the inspection is closed.
	<p><b>Remains in Violation:</b></p> <ul style="list-style-type: none"> <li>• The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See <a href="#">Setting Up Time Rules</a></li> </ul>



Status at the time of inspection	Result
	<ul style="list-style-type: none"> <li>• A new inspection is scheduled, which can be updated by the code officer.</li> <li>• A notice is created, which must be updated by the code officer before printing it.</li> </ul> <p>For time rule calculations related to compliance due dates, see the section <b>Compliance Date Calculations based on Inspection Result</b> in the topic <i>Reviewing Code Enforcement Inspection Details</i>.</p>
	<p><b>Issue Citation:</b></p> <ul style="list-style-type: none"> <li>• The status of the case changes to Citation and the inspection is closed.</li> <li>• The compliance date is extended.</li> <li>• A notice is created, which must be updated by the code enforcement officer before printing it.</li> <li>• A re-inspection is scheduled, which must be updated by the code enforcement officer.</li> </ul>
	<p><b>Extension:</b></p> <ul style="list-style-type: none"> <li>• The status of the case remains unchanged and the inspection is closed.</li> <li>• The compliance date is extended, based on the time rules set up.</li> </ul>
	<p><b>Mandatory Abatement:</b></p> <ul style="list-style-type: none"> <li>• The status of the case changes to Mandatory Abatement and the inspection is closed.</li> <li>• The compliance date remains unchanged.</li> <li>• The code technician schedules an inspection.</li> </ul>
Appeal	<p><b>In Compliance:</b> The status of the case changes to Compliance and the inspection is closed.</p>
	<p><b>Extension:</b></p> <ul style="list-style-type: none"> <li>• The status of the case remains unchanged.</li> <li>• Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection.</li> <li>• The compliance date must be manually extended by the code officer.</li> </ul>
	<p><b>Not in Compliance:</b></p> <ul style="list-style-type: none"> <li>• The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection.</li> <li>• The compliance date is extended, based on the time rules set up.</li> </ul>
Hearing	<p><b>In Compliance:</b> The status of the case changes to Compliance and the inspection is closed.</p>
	<p><b>Extension:</b></p> <ul style="list-style-type: none"> <li>• The status of the case remains unchanged.</li> <li>• Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection.</li> <li>• The compliance date must be manually extended by the code officer.</li> </ul>
	<p><b>Not in Compliance:</b></p>

Status at the time of inspection	Result
	<ul style="list-style-type: none"> <li>The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection.</li> <li>The compliance date is extended, based on the time rules set up.</li> </ul>
Legal	<p>When a case status is Legal, the case is transferred to the legal department.</p> <p><b>In Compliance:</b> The status of the case changes to Compliance and the inspection is closed.</p>
	<p><b>Extension:</b></p> <ul style="list-style-type: none"> <li>The status of the case remains unchanged.</li> <li>Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection.</li> <li>The compliance date must be manually extended by the code officer.</li> </ul>
	<p><b>Not in Compliance:</b></p> <ul style="list-style-type: none"> <li>The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection.</li> <li>The compliance date is extended, based on the time rules set up.</li> </ul>
Citation	<p><b>In Compliance:</b> The status of the case changes to Compliance and the inspection is closed.</p>
	<p><b>Remains in Citation:</b> The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See <a href="#">Setting Up Time Rules</a>.</p> <p>A new inspection is scheduled, which can be updated by the code officer.</p>
	<p><b>Issue Citation:</b></p> <ul style="list-style-type: none"> <li>The status of the case remains unchanged and the inspection is closed.</li> <li>The compliance date is extended, based on the time rules set up.</li> <li>A notice is created, which must be updated by the code enforcement officer before printing it.</li> <li>A re-inspection is scheduled, which must be updated by the code enforcement officer.</li> </ul>
	<p><b>Mandatory Abatement:</b></p> <ul style="list-style-type: none"> <li>The status of the case changes to Mandatory Abatement and the inspection is closed.</li> <li>The compliance date remains unchanged.</li> <li>The code technician schedules an inspection.</li> </ul>
	<p><b>Extension:</b></p> <ul style="list-style-type: none"> <li>The status of the case remains unchanged and the inspection is closed.</li> <li>The compliance date is extended, based on the time rules set up.</li> </ul>
Mandatory Abatement	<p><b>Abatement Complete:</b> The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.</p>

Status at the time of inspection	Result
	<b>Abatement Incomplete:</b> The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.

*Related Topics*

- [Reviewing Code Enforcement Inspection Details](#)



# 8 Managing Cases

## Security Details for Managing Cases

This topic describes important security roles, requirements, or considerations specific to managing cases.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Code Enforcement Case Inquiry Duty	View Code Enforcement cases, notices, fees, hearings, and appeals.	PSC Agency Staff - All agency users
PSC Code Enforcement Case Management	Manage Code Enforcement cases, notices, fees, hearings, and appeals.	PSC System Administrator PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician
PSC Update Case Comments Added by Others and Self	Update Code Enforcement case comments added by others and themselves.	PSC System Administrator
PSC Delete Case Comments Added by Others and Self	Delete Code Enforcement case comments added by others and themselves.	PSC System Administrator
PSC Delete Case Attachments Added by Others and Self	Delete Code Enforcement case attachments added by others and themselves.	PSC System Administrator
PSC Update Case Attachments Added by Others and Self	Update Code Enforcement case attachments added by others and themselves.	PSC System Administrator
PSC Code Enforcement Application Administrator	Access to add, update, delete, recalculate and pay fees at all times	PSC Cashier PSC Case Fees and Payments Management
PSC Case Fees and Payments Management	Add and update Violation fees.  View fee information after violation fees is paid	PSC Cashier
Registered Public User	Access to pay fee dues on Case Summary card to which the user has online access.	
PSC Code Enforcement Responsible Party	Online access to the case.  Access to pay fees.	

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## Reviewing and Claiming Cases

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

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

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

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

### Reviewing and Claiming Cases Using the Code Technician Worklist

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

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

4. If necessary, review the complete details for the case.
  - a. Click the **View More Details** icon to access the Case page.
  - b. On the Case page, review the information on the Overview, Details, Inspections, Notices, and other tabs. See *Navigating to Case Details*.
  - c. Click the **Back** icon in the banner at the top of the page to return to the worklist, and re-navigate to the Unassigned Cases tab.
5. Click the **Claim** button to claim the case.

Claiming a case makes you the assigned technician. As the assigned code technician, you are now responsible for processing the case.

## Reviewing and Claiming Cases on the Case Detail Page

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

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

## Processing Cases

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

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

- Manage case activity.
- Create a case.
- Update case status.
- Assign or reassign technicians and officers to cases.
- Access details about case history.

## Using the Cases Page


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

Page Element	Description
Download	Click the download button to export the list to a .csv file.

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

## Managing Case Activity

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.  
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, you can locate the basic information about the case using the following information:

Page Element	Description
	Click to select one or more cases using the check boxes next to case records.
<b>Reassign Code Officer</b>	<p>Click the button to open the Reassign Code Officer page and select a code officer that you want to assign all the selected cases. Click <b>Save</b> to apply the assignments and return to the Cases page.</p> <p>This option is available only after you select one or more cases.</p>



Page Element	Description
<b>Reassign Code Technician</b>	<p>Click the button to open the Reassign Code Technician page and select a code technician that you want to assign all the selected cases. Click <b>Save</b> to apply the assignments and return to the Cases page.</p> <p>This option is available only after you select one or more cases.</p>
<b>Create Case</b>	<p>Click to create a new case.</p> <p>This option is not available in the Code Technician Worklist — Cases page. You must navigate to the Cases page using the <b>Cases</b> tile.</p>
<b>Case</b>	View the case ID, issue type, and issue subtype.
<b>Creation Date</b>	View the date on which the case was created.
<b>Address</b>	View the location of the issue.
<b>Issue Description</b>	Review the description of the case.
<b>Case Status</b>	<p>View the status of the case, for example, <i>Closed</i>, <i>Compliance</i>, <i>Violation</i>, <i>Void</i>, <i>Mandatory Abatement</i> and <i>Legal</i>.</p> <p>For details about the options, see <a href="#">Viewing the Case Detail Overview</a>.</p>
<b>Comply by</b>	View the last date to ensure compliance.
<b>Technician Assigned</b>	View the name of the code technician currently assigned to the case.
<b>Assigned Code Officer</b>	View the name of the code officer currently assigned to the case.
<b>Actions</b>	<p>Click to perform actions:</p> <ul style="list-style-type: none"> <li>○ <i>Update Status</i>: Click to open the Update Status page and select a new status from the drop-down menu. Click <b>Done</b> after you enter a reason. Depending on the status you select, the workflow stages and their tasks are accordingly updated. The list of transaction</li> </ul>

Page Element	Description
	<p>statuses along with each of its associated system status are set up by your administrator. See <a href="#">Setting Up Transaction Statuses</a>.</p> <p><b>Note:</b> The <b>Update Status</b> option is available only if your agency has enabled the <b>Available to Manually Select as New Status</b> option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p> <ul style="list-style-type: none"> <li>○ <i>Assign/Reassign Code Officer:</i> Click to open a modal page and select the new code officer to assign to the case.</li> <li>○ <i>Assign/Reassign Code Technician:</i> Click to open a modal page and select the new code technician to assign to the case.</li> </ul> <p>Click <b>Save</b> to apply the changes and return to the Cases page.</p>

## Creating a Case

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

To create a case:

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

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

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

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

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

## Navigating to Case Details

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

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

To access the case detail pages:

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

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

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

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

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

The information for a case comprises these pages:

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

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

## Viewing the Case Detail Overview

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


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

As agency staff, you can use the Overview page to set the status of the case, assign inspectors and technicians to the case, indicate that the case is ready for early inspection, update the issue description, and change the priority of the case.

### Using the Overview Page

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.  
Alternatively, you can select the **Cases** tile on the Agency Springboard
2. On the Cases page, click **View More Details** for the case row you want to access.

3. On the Overview page, review details or enter the following information in the **Overview** section:

Page Element	Description
<p><b>Case Status</b></p>	<p>Review the case status, which is updated by Workflow.</p> <p>To manually change the status of the case, click the <b>Edit</b> link to open the Update Status page, select a new status value, and enter a reason for the change. Click <b>Done</b>. Depending on the status you select, the workflow stages and their tasks are accordingly updated.</p> <p>The list of transaction statuses along with each of its associated system status are set up by your administrator. See <i>Setting Up Transaction Statuses</i>.</p> <p><b>Note:</b> The <b>Update Status</b> option is available only if your agency has enabled the <b>Available to Manually Select as New Status</b> option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p>
<p><b>Inspector Assigned</b></p>	<p>Assign an inspector to the case by using the look-up prompt.</p>
	<p>Click the icon to open a modal page that lists all the code officers previously assigned to the case, with the details of the assignment date and time.</p>
<p><b>Technician Assigned</b></p>	<p>Assign a technician to the case by using the look-up prompt.</p> <p>The Assign Technician page lists only the technicians that are associated with the issue type and subtype of this case. Select the <b>Show All Technicians</b> check box to list all the technicians.</p> <p><b>Note:</b> This check box is available to agency staff with appropriate permissions, only when the <i>Autoassignment</i> option is turned on.</p> <p>Technicians can claim cases from the code technician worklist. To access the code technician worklist, select <b>Code Technician Worklist</b> on the Agency Springboard and click the Unassigned Cases tab. See <i>Using the Code Technician Worklist</i>.</p>
<p><b>Issue Description</b></p>	<p>Review the description of the issue. To update the description, click the <b>Edit</b> link to open the Update Issue Description page and change the description text. Click <b>Done</b>.</p>
<p><b>High Priority</b></p>	<p>Indicates the priority of the case. To update the priority, click the <b>Edit</b> link to open the Update Case Priority page, select the switch, and use the calendar to select a new compliance date. Click <b>Done</b>.</p>

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

- The **Responsible Parties** section shows the name of the primary responsible party, type of responsible party, and the mailing address. **Access Number** field displays a unique identifier, which is generated at the time of case creation. The responsible party must provide the access number at the time of requesting access to their case. See *Resolving Issues*.
- In the **Inspections** section shows the next inspection due date. Turn on the **Ready for Inspection** switch when the responsible party indicates that the case is ready for an inspection prior to the scheduled inspection date. The inspection status on the Inspections page changes to *Scheduled – Ready*, and the case is ready for the code officer to inspect.

**Note:** This switch is available for edit only when the case has a scheduled inspection for violation or citation, and remains until the compliance date is reached.

See *Using the Code Officer Worklist*.

- Review important information about the selected case in separate sections on the Overview page. Click the **View Details** link to navigate to the page. Only those sections that contain data records to show are displayed in the overview page.

## Working with Case Timeline

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

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

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

### Viewing a Case Timeline

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

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

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

2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Timeline** in the left panel to open the list of case events.

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

## Working with Case Property Information

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

### Viewing Parcel Information

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

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

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

2. On the Cases page, click **View More Details** for the case you are working with.
3. Select the Property Information tab in the left panel to open the detail view of the property.

**Note:** A condition icon is displayed near the Parcel ID if a parcel associated with a case has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.

### Changing Property

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

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

### Updating Property Address

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

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

### Viewing Cases Associated with a Parcel

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

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



## Using Workflow

This topic describes how to manage the underlying workflow associated with permits, planning applications, business licenses, and code enforcement cases.

Workflow provides a defined structure for business licenses, permits, planning applications, and code enforcement life cycles. Each transaction is associated with a workflow process definition that guides the transaction automatically through the process of application submission to completion. The process definition is a collection of tasks completed by humans and tasks completed by the system. For example, humans perform manual steps such as approving a permit application, while the workflow engine performs automated steps such as updating inspection statuses or sending communications.

Managing workflow tasks consists of updating the assignment, status, and priority for a task that a human performs during the transaction cycle. 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.

## Security Details for Using Workflow

This section describes important security roles, requirements, or considerations specific to using workflow.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permit Workflow Administration	Administer permits workflows.	PSC System Administrator PSC Permits Supervisor PSC System Administrator
PSC Permits Workflow User	Participate in permit workflow, add, update comments and attachments on workflow	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Update Permit Workflow Comments added by others and self	Update permit workflow comments added by others and self	PSC System Administrator
PSC Update Permit Workflow Comments added by self	Update permit workflow comments added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Delete Permit Workflow Comments added by others and self	Delete permit workflow comments added by others and self	PSC System Administrator
PSC Delete Permit Workflow Comments added by self	Delete permit workflow comments added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC View Permit Workflow Attachments	View permit workflow attachments	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Update Permit Workflow Attachments that were added by others and self	Update permit workflow attachments that were added by others and self	PSC System Administrator
PSC Update Permit Workflow Attachments that were added by self	Update permit workflow attachments that were added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Delete Permit Workflow Attachments that were added by others and self	Delete permit workflow attachments that were added by others and self	PSC System Administrator
PSC Delete Permit Workflow Attachments that were added by self	Delete permit workflow attachments that were added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC View Hidden from Public sections in the Permit Applications	View hidden from public sections in the permit and planning detail form.	PSC Agency Staff - All agency users

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Add Comments to Permit Workflow Task assigned to anyone	Add comments to permit workflow task assigned to anyone	PSC System Administrator
PSC Add Comments to Permit Workflow Task assigned to self	Add comments to permit workflow task assigned to self	PSC Permits Workflow User Duty

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Planning and Zoning Workflow User	Participate in workflow, add, update,your tasks, comments and attachments	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Finance Administrator PSC Economic Development Officer PSC Principal Planner
PSC Planning and Zoning Workflow Administration	Participate in workflow, manage all tasks, comments and attachments. The user should also be assigned the PCS Service Administrator role in IDCS.	PSC System Administrator
PSC Update Planning and Zoning Workflow Attachments added by others and self	Update planning and zoning workflow attachments added by others and themselves.	PSC System Administrator
PSC Delete Planning and Zoning Workflow Attachments Added by Others and Self	Delete planning and zoning workflow attachments added by others and themselves.	PSC System Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Workflow User	Participate in code enforcement workflow	PSC System Administrator PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician

For more information on creating roles for Public Sector Licensing and Permitting, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## 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 transaction 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 Two-Panel View in Workflow for an Application

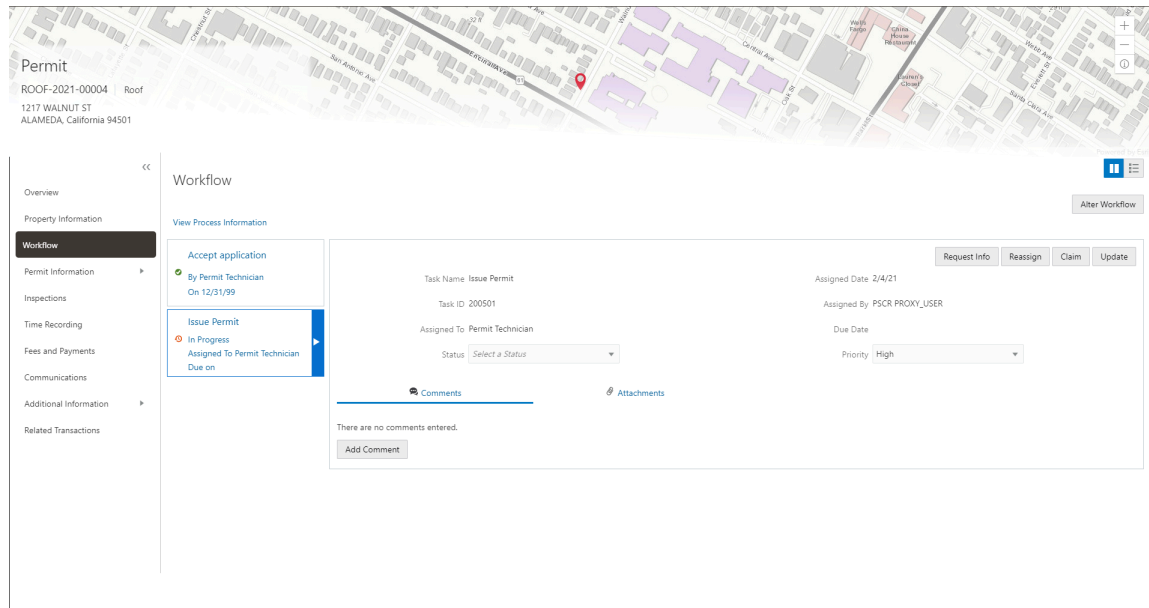
To manage workflow tasks in a two-panel view:

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

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

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

Page Element	Description
<b>Reassign</b>	Click to choose an assignee for the task.  See <i>Managing Tasks</i> .
<b>Claim</b>	Click to assign the task to yourself.  This button is visible only for tasks that are assigned to a group rather than to an individual.
<b>Release</b>	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
<b>Status</b>	<p>Select a status that represents the final outcome of the task.</p> <p>The task statuses depend on the workflow setup. For example, the available statuses for a task that requires a simple approval might be <i>Approve</i> and <i>Reject</i>. The workflow status of each task is defined by the agency using OIC.</p> <p>Other tasks might require different statuses. The sample workflow that Oracle provides includes these statuses for the task where you review an application: <i>Accepted – Plan Review Not Required</i>, <i>Accepted – Plan Review Required</i>, <i>Planner Assigned</i>, <i>Specialist Assigned</i>, <i>More Info Needed</i>, and <i>Reject</i>.</p> <p><b>Note:</b> Task statuses are not the same as application status. However, the workflow engine can update the application status based on the outcome of a task.</p>
<b>Priority</b>	Set the priority to <i>High</i> , <i>Medium</i> , or <i>Low</i> . The priority is informational only.

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 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. With Code Enforcement, the underlying process definition differs from the type used for permits or planning applications. A process definition used for Code Enforcement is a *dynamic* process definition based on stages and milestones.

The two-panel view can further be toggled between a stage view and milestone view. In the stage view, the agency staff gets a quick indication of the number of stages in the workflow as buttons at the top of the page. You can click a stage to view details in the task panels below.

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

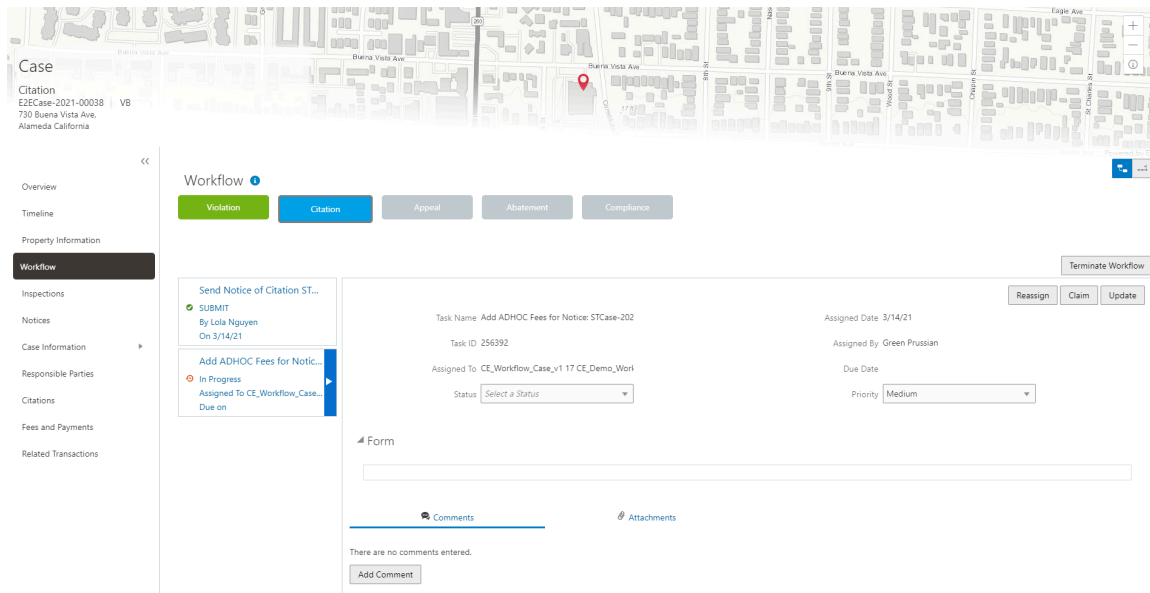


To access Incident or Case Workflow page in the two-panel, stage view:

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

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

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



Page Element	Description
<b>Stage View</b> and <b>Milestone View</b> icons	Use these buttons to toggle between the stage and milestone views.
<b>Stages</b>	<p>Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below.</p> <p>The names of these stages and their labels are displayed as configured in the Oracle Integration Cloud (OIC) that are defined by the agency. The stages are represented in different colors to show their status:</p> <ul style="list-style-type: none"> <li>○ Blue: Active</li> <li>○ Green: Completed</li> <li>○ Gray: Not active or Terminated</li> </ul> <p>You can click the buttons in the active and completed stages to view their details in the Task Details panel.</p> <p>Examples of stages that appear in an incident's workflow include <i>Reported</i>, <i>Inspection</i>, <i>Violation</i>, <i>Legal</i>, and <i>Closed</i>.</p>

Page Element	Description
<b>Terminate Workflow</b>	<p>Click this button to stop or terminate a workflow.</p> <p>Once a workflow has started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p> <p><b>Note:</b> You can't activate a terminated workflow.</p>
<b>Form</b>	<p>Use the form to review any information entered by the code enforcement officer or to enter your own information.</p> <p>Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. The agency can customize the form for their specific requirement.</p>

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

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

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

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

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

Page Element	Description
<b>Stage View</b> and <b>Milestone View</b> icons	Use these buttons to toggle between the stage and milestone views.
<b>Milestones</b>	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> .
<b>Terminate Workflow</b>	<p>Click this button to stop or terminate a workflow.</p> <p>Once a workflow had started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p> <p><b>Note:</b> You cannot make a terminated workflow active again.</p>
<b>Form</b>	<p>Use the form to check or enter information as specified by the agency.</p> <p>Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. This form is customizable by the agency to cater to their specific requirement</p>

## Using 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. Implementation teams can add their own labels if needed, depending on the task. You can hide and provide custom labels using custom properties in the workflow process definition for any human task. For more information on workflow process definition custom properties, see [Using Custom Properties](#).

## Viewing the Overall Workflow (List View) for an Application

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

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

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

To use the list view:

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

The task list displays:

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

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

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

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

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

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

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

## Altering Workflow

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

To alter workflow:

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

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

6. Click **Save**.

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

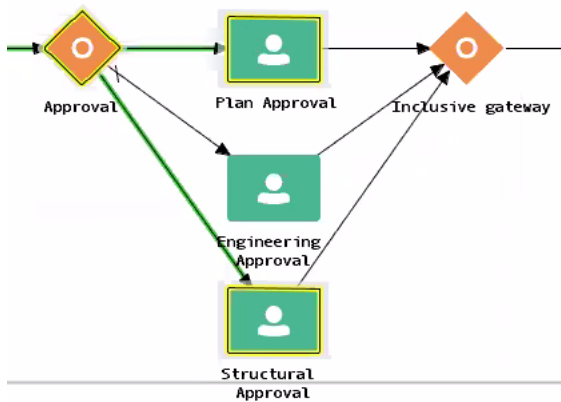
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

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

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

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

This example illustrates a workflow process definition with parallel tasks.



This example illustrates the Alter Workflow tab displaying parallel tasks.

Alter Workflow

▲ Plan Approval

New Workflow Activity Name Plan Approval

▲ Structural Approval

New Workflow Activity Name Structural Approval

Update Transaction Status Submitted

Comments

View Workflow Save Cancel

## Working with Workflow for Reopened Transactions

In some cases, you may have a reason to reopen a transaction to perform additional inspections, plan reviews, and so on. Supervisors or administrators can reopen transactions in the status of:

- Completed
- Expired

For more information on reopening transactions, see *Reopening a Permit or Planning Application*.

When you reopen a transaction, a new workflow instance is assigned to the transaction. The transaction will be set to the workflow state you have set. You can then access, and process the transaction as usual.

**Note:** Any applicable fees or conditions need to be applied manually to reopened transactions.

When working with the reopened transaction, the Workflow tab reflects the currently active workflow instance and all previously closed workflow instances for reference. Use the instance drop-down list to select an instance.

### Workflow

Active workflow - 11/30/21

Active workflow - 11/30/21

Closed workflow - 11/30/21

In Progress

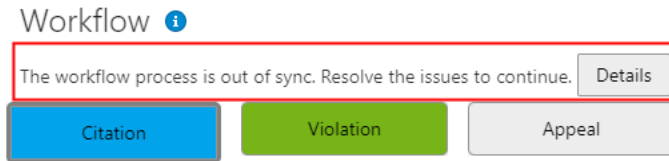
Assigned To Permit Technician

Due on



## Working with Inconsistent Processes

Sometimes, though rare, the workflow process can get out of sync with either the Public Sector Licensing and Permitting offering or the workflow engine. In this case, a message appears at the top of the Workflow tab letting you know that action needs to be taken for that process to resolve the issue.



When you see this message, click the **Details** button to open the Manage Process Instances page where you can take the appropriate action, such as resubmitting, altering workflow, and so on.

For additional information, see [Monitoring Workflow Transactions](#).

### Related Topics

- [Code Enforcement Workflow Basics](#)

## Working with Code Enforcement Inspections

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

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

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

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

## Viewing Inspection Information

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

4. On the Inspections page, you can view inspection information in these fields:

Page Element	Description
<b>Schedule Inspection</b>	<p>Click to open the Schedule page and use the calendar to select from the dates that the assigned inspector is available for an inspection.</p> <p><b>Note:</b> This option is available only if there are no pending inspections scheduled. The status of all the inspection schedules must be either Completed or Canceled.</p>
<b>Inspection</b>	<p>View the number of inspections carried out till date for the case.</p> <p>The format of the inspection count is set up by the agency administrator on the Inspection Count page. See <a href="#">Setting Up Inspection Counts</a>.</p>
<b>Inspection Status</b>	<p>View the status of the inspection:</p> <ul style="list-style-type: none"> <li>○ Completed</li> <li>○ Scheduled</li> <li>○ Canceled</li> </ul>
<b>Assigned To</b>	<p>Identifies the inspector assigned to the case.</p>
<b>Scheduled Date</b>	<p>View the date on which the inspection is scheduled.</p>
<b>Inspection Completion Date</b>	<p>View the date on which the inspection was completed.</p>
<b>Inspection Outcome</b>	<p>View the result of the inspection.</p> <ul style="list-style-type: none"> <li>○ <b>In compliance</b></li> <li>○ <b>Not in Compliance:</b> This value is displayed as the result of inspection for a case in <i>Appeal, Hearing, or Legal</i> status.</li> <li>○ <b>Violation</b></li> <li>○ <b>Referral</b></li> <li>○ <b>Remains in Violation</b></li> <li>○ <b>Issue Citation</b></li> <li>○ <b>Remains in Citation</b></li> <li>○ <b>Extension</b></li> <li>○ <b>Mandatory Abatement</b></li> <li>○ <b>Closed</b></li> </ul>

Page Element	Description
	For more information, see <a href="#">Submitting Code Enforcement Inspection Results</a> .
<b>Reschedule</b>	<p>Click to open the Schedule page and use the calendar to select the next available date for the assigned inspector to schedule the inspection.</p> <p><b>Note:</b> This option is available only for inspections that are not completed.</p>
<b>Canceled</b>	<p>Click to cancel the inspection schedule.</p> <p><b>Note:</b> This option is available only for inspections that are not completed.</p>

## Viewing Inspection Detail

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

## Scheduling Inspection

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

This option is available only if there are no inspections already scheduled for the case.

5. On the Schedule page, use the **Next Schedule Date** field to select a date from the calendar, which shows only those dates that the assigned inspector is available.

## 6. Click **Save**.

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

## Rescheduling and Canceling Inspection

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

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

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

2. On the Cases page, select the case you are working with by clicking the **View More Details** button.
3. Click **Inspections** in the left navigation panel of the case details.
4. To reschedule, click the **Reschedule** button on the inspection row.
5. To cancel the schedule, click the **Cancel** button on the inspection row.

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

## Working with Notices

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

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

- *Notice of Violation and Notice of Citation* tab:

**Agency Springboard > Code Technician Worklist > Notice of Violation** and **Notice of Citation**. The **Generate** or **Continue** option is available in the row. Click **View More Details** if you want to view the complete details.

- *Case Overview* page:

**Agency Springboard > Cases** . Select the case you are working with. On the Overview page, scroll down to the Notices section. The **Generate** or **Continue** option is available in the row. Click **View Details** if you want to view the complete details.


- *Notices Page*:

**Agency Springboard > Cases** . Select the case you are working with. Select **Notices** in the left navigation panel.

## Viewing Notices

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

The **Notices** page shows the list of all notices for the case – including the notices added from the mobile application. You can use the Search option to search for a notice based on its ID or name. View the information and perform actions as described here:

Page Element	Description
<b>Notice ID</b>	View the identifier of the notice.
<b>Notice</b>	View the generated name of the notice, based on the nature of violation.
<b>Type</b>	View the type of notice: <ul style="list-style-type: none"> <li>• Ad hoc</li> <li>• System</li> </ul>
<b>Category</b>	View the category of the notice.
<b>Count</b>	View the reference value that determines when the ad hoc notice must be applied.
<b>Case Status</b>	View the status of the case: <ul style="list-style-type: none"> <li>• Violation</li> <li>• Citation</li> </ul>
<b>Status</b>	View the status of the notice: <ul style="list-style-type: none"> <li>• <i>Pending</i>: Indicates that the notice object is created.</li> <li>• <i>In Progress</i>: Indicates that details are entered in the notice and saved.</li> <li>• <i>Generated</i>: Indicates that the notice is generated and printed.</li> <li>• <i>Sent</i>: Indicates that the notice has been sent to the responsible party.</li> <li>• <i>Received</i>: Indicates that the notice was received by the responsible party.</li> </ul>
<b>Notice Creation Date</b>	View the date on which the notice was created.
<b>Sent Date</b>	View the date on which the notice was dispatched.
<b>Tracking Number</b>	View the tracking number associated with the shipment of the notice.
<b>Actions</b>	Select from available options, which are based on the status of the notice: <ul style="list-style-type: none"> <li>• <i>Generate</i> : Click to open the Generate Notice page and enter details to generate the notice. This option is available only for the notice records in Pending status.</li> <li>• <i>Continue</i>: Click to open the Generate Notice page and complete the details of the previously saved notice. This option is available only for the notice records in In Progress status.</li> <li>• <i>Cancel</i>: Click to cancel the notice.This option is available only for the notice records in <b>Pending</b> or <b>In Progress</b> status. See the section Canceling a Notice</li> </ul>
	Click to open the Edit Notice Details page to enter additional details about the notice, such as tracking details.  This option is available only for the notice records that are in Generated, Sent, or Received status.

## Creating an Ad Hoc Notice

To manually create an ad hoc notice for a case:

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Add Notice** button.
3. On the Add Notice page, use the **Category** field to select a category of the notice, which is set up by your agency in the **Ad Hoc Associations** section on the Notice and Report Group page.
4. Use the **Select** button on the notice record you want to add. You can use the Search option to search for and select the ad hoc notice subtype applicable for the case.
5. The Add Notice page closes and the Notices page now lists the new ad hoc notice record.

## Generating a Notice

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

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Actions** menu and then select the **Generate** button.

**Note:** This option is available only for the notice records in Pending status. If the status is in In Progress, you will see the **Continue** option. Use this option in case the notice was generated earlier and saved for later.

3. On the Generate Notice page, the top section shows notice information such as the name, issue type and subtype.

The middle section has the following page elements:

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

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

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

- *Verify Details:* Enter the compliance date and a description about the violation or citation.
- *Responsible Party and Mailing Address:* The section lists all the responsible parties related to the case. The notice will be sent to all the listed parties. To add a new responsible party, click the **Add Responsible**

**Party** button. On the Add Responsible Party page, you can add a new record by entering the details or you can click the **Select from Parcel Owners** link to search and select an existing parcel owner record. For details, see [Adding Responsible Parties](#).

- **Code Violations**: Review the list of code violations. For a notice of violation, the list shows the violations that are in Open status. The notice of citation list shows all the violations in their current status.

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

4. Click **Save Changes**. You can close the window and return to the notice at a later time. You can use the **Continue** button to access this page later.
5. Click **Complete** on the Generate Notice page. The status of the notice record changes to Generated and the record is removed from the worklist. You can access the record on the Notices page, which lists all the notices records for the case.

## Editing Notice Details

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

1. Select **Cases** on the agency Springboard.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Select **Notices** in the left navigation panel. Select a generated notice row that you want to update by clicking the **View Details** button.
4. On the Edit Notice Details page, the top section shows the notice details such as name, notice ID, status, type and the notice generated date. You can also see the name of the person who last updated the notice, and the date and time of the last update.

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

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

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

## Canceling a Notice

You can cancel a notice when its status is *Pending* or *In Progress*. On the Notices page use the **Cancel** option from the **Actions** menu to cancel the notice. The notice status changes to *Canceled*, and the notice count value reduces by one if it's a system generated notice.

### Workflow Impact

When a Notice is canceled, a new task – **Canceled Notice** is created along with the existing open tasks related to the notice. Agency staff review the workflow tasks and take necessary actions such as closing the tasks manually.

**Note:** The citation object and fees associated with the notice remain unaltered when a notice is canceled.

See [Using Workflow](#).

## Working with Communications

Messages enable agency staff, responsible parties, and applicants to maintain correspondence regarding the progress of applications or cases.

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

### Security Details for Working with Application Communications

This section describes important security roles, requirements, or considerations specific to working with permit and planning application communications.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
Anonymous access	View permit communications that are marked as visible to the public.	All users, including guests who don't log in.
PSC Registered Public User	View communications that are marked as visible to applicants.	PSC Registered Public User
PSC Permits Communication Management	Manage communications in permit applications.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Business Analyst PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician



Primary Role	Access Description	Associated Job Roles and Abstract Roles
Anonymous access	View planning application communications that are marked as visible to the public.	All users, including guests who don't log in.
PSC Registered Public User	View communications that are marked as visible to applicants.	PSC Registered Public User
PSC Planning and Zoning Communication Management	Manage communications in planning applications.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).

## Sending Communications

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

Select an application on the Transactions page. For Code Enforcement, select a Case.

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
<b>Channel Type</b>	Specify what type of ad hoc message you want to send. Values are: <ul style="list-style-type: none"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> </ul>

Page Elements	Definition
	<ul style="list-style-type: none"> <li>○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users.</li> </ul> <p><b>Note:</b> The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
<b>Visibility</b>	<p>Select which users can see this message listed on the application's Communication Details page. All communications can be viewed by agency staff. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction.</li> <li>○ <i>Agency staff only</i>: Includes only agency staff.</li> <li>○ <i>Applicant</i>: Includes agency staff and the applicant on the transaction.</li> </ul> <p><b>Note:</b> This option is presently not applicable for Code Enforcement.</p>
<b>Display Format</b>	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>HTML</i>: Displays rich text, links, and images</li> <li>○ <i>Text</i>: Displays plain, unformatted text.</li> </ul> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<b>Priority</b>	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<b>User Can Delete</b>	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>

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

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

You can also insert variables for contact attributes into fields when composing a communication for contacts with a specific type, the primary contact, or all contacts. Select attributes such as phone, email, user ID, and user name of the contacts and insert the variables into the selected field. For example, if you want to send an email to all of the contacts for an application, you select the email attribute for all contacts and insert the variable into the email **To** field. For information about inserting variables, see [Using Attributes in Communication Templates](#).

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, responsible party, 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, responsible party, 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 or case, including emails, notifications, texts, and web form responses.

1. Click **Business License Transactions, Permits, Planning Applications** , or **Cases** on the Agency Springboard. Select an application on the Transactions page. For Code Enforcement, select a case. Click Communications in the navigation bar. You can view the message reference ID, date and time the message was sent, message subject, channel type, and status, such as *Sent*.
2. For each row on the Communication Details page you can:
  - o Click the **Actions** icon to resend or forward the message. Select the **Resend** action to access the message in the Message Details modal page in display-only mode. Click **Resend** to send the message another time to the same list of recipients.

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

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

## Working with Code Violations

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

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

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

## Viewing and Modifying Code Violations

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

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

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

2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Case Information** and then select **Code Violations** in the left panel to open the list of code violations.

Expand each code violation record to view the description, corrective actions, and the actions available. Each record shows the status of the code violation:

- **Open** – The status of a newly added code violation.
  - **Canceled** – The status of the code violation when the code officer removes the violation record that was added to the case from a previous inspection.
  - **Resolved** – The status of the code violation when the code officer resolves the code violation after confirming compliance.
4. As agency staff you can use the **Edit** icon to modify the summary and descriptions for violations. You can also modify the description for corrective actions. The Description field enables you to use Rich Text formatting options for the text you enter. Use the **Delete** icon to delete a violation and its corrective action.

## Adding Code Violations

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

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

- Click the **Add** button to open the Select Codes page, search, and select violations. The Selections tab shows the code violations you have selected:

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

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

## Resolving, Removing, and Reopening Code Violations

Code technicians use the Actions menu to take actions such as Resolve, Remove from Case, and Reopen.

- Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.
- On the Cases page, click **View More Details** for the case you are working with.
- Click **Case Information** and select **Code Violations** in the left panel to show the list of code violations.

Expand the code violation record and click the three-dot **Actions** menu to take any of the following actions:

Element	Description
<b>Resolve</b>	Select to resolve the code violation.
<b>Remove from Case</b>	<p>Select to remove the code violation from the case. The status of the code violation changes to Canceled.</p> <p><b>Note:</b> You cannot delete a code violation from a case. Also note that you cannot remove a code violation that is associated with a citation.</p> <p>For details about deleting code violations from an inspection, see the section <i>Using the Code Enforcement Inspection Page</i> under the topic <i>Using the Code Officer Worklist</i>.</p>
<b>Reopen</b>	Select to reopen the code violation from its resolved or canceled status. This option is not available if the case is in one of the statuses – Compliance, Closed, or Void.

## 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.

Applicants and contacts with application access can view and add comments to their own applications as well as update and delete the comments they added themselves. See the section "Security Details for Working with Comments" for information about setting up security for agency staff, applicants, and application contacts to manage comments.

### Security Details for Working with Comments

This section describes important security roles, requirements, or considerations specific to working with comments.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Add Comments to Permits	Add comments to permits till they are not closed.	PSC Permits Management with Elevated Access PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permit Management with Elevated Access	Add comments to permits at all times.	PSC System Administrator PSC Permits Supervisor
PSC Update Permit Comments added by others and self	Update permit comments added by others and by themselves.	PSC System Administrator
PSC Update Permit Comments added by self	Update permit comments added by themselves.	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer



Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Delete Permit Comments added by others and self	Delete permit comments added by others and by themselves.	PSC System Administrator
PSC Delete Permit Comments added by self	Delete permit comments added by themselves.	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public.  Add, update, and delete comments till the application is closed.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public.  Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Add Comments to Planning and Zoning	Add comments to planning applications that are not closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Planning Application Management with Elevated Access	Add comments to planning applications at all times.	PSC Zoning Administrator PSC System Administrator
PSC Update Planning and Zoning Comments added by others and self	Update planning and zoning comments added by others and by themselves.	PSC System Administrator
PSC Update Planning and Zoning Comments added by self	Update planning and zoning comments added by themselves.	PSC Apply Planning and Zoning Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Delete Planning and Zoning Comments added by others and self	Delete planning and zoning comments added by others and by themselves.	PSC System Administrator
PSC Delete Planning and Zoning Comments added by self	Delete planning and zoning comments added by themselves.	PSC Apply Planning and Zoning Duty PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician

**Note:** Before application 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 application access for the contact type.

For more information on creating roles for Public Sector Licensing and Permits, see *Creating Custom Roles for Public Sector Licensing and Permitting*.

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the *Security Reference for Oracle Public Sector Licensing and Permitting*.

## Adding Comments

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

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

## Viewing and Modifying Comments

1. Access the detail page for the transaction, contractor license, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.

You view a list of comments in the right panel.

3. You can modify, delete, or hide a comment from public view only if it was entered by you. Click the specific comment row to open the detail view and make changes.
4. Click **Save**.

## Adding a New Comment

1. Access the detail page for the transaction, contractor license, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.
3. Click the **Add Comment** button to open the Add Comment page and enter a new comment.

You can use the **Hide from Public** icon, to hide a comment from public view and also toggle between hide and show.

You can use the **Rich Text Editor** option for formatting your comment with tools such as the numbered list. The Link button allows you to embed a URL to display the text you enter. See *Managing Comments* to enable the option of **Rich Text Editor** formatting.

4. Click **Save** to post the comment and return to the Comments page.

## Adding Favorite, Standard, and Recent Comments

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

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

See [Managing Comments](#).

## Working with Attachments

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

Attachments provide supporting documentation needed by agency staff when processing transactions or managing records. See the section "Security Details for Working with Attachments" for information about setting up security for agency staff, applicants, and contacts with application access to manage attachments.

You can manage attachments associated with a transaction on different pages in Oracle Public Sector Licensing and Permitting. 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](#).

## Security Details for Working with Attachments

This section describes important security roles, requirements, or considerations specific to working with attachments for permits and planning applications.

These security roles apply to permit attachments:

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments to submitted permits until they are closed.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
	View all attachments on applications for which the user is the applicant.	
PSC Agency Permits Inquiry	View permit attachments.	PSC Agency Staff – All agency users
PSC Permits Attachments User	<p>Add attachments to permits.</p> <p>Update and delete attachments added by themselves.</p>	<p>PSC Inspections Supervisor</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Chief Building Officer</p> <p>PSC Cashier</p> <p>PSC Building Inspector</p> <p>PSC Apply Permit Duty</p> <p>PSC System Administrator</p> <p>PSC Principal Planner</p> <p>PSC Planning Coordinator</p> <p>PSC Plan Reviewer</p> <p>PSC Permits Supervisor</p> <p>PSC Permit Technician</p>
PSC Add Permit Attachments	Add permit attachments.	<p>PSC Inspections Supervisor</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Chief Building Officer</p> <p>PSC Cashier</p> <p>PSC Building Inspector</p> <p>PSC Apply Permit Duty</p> <p>PSC System Administrator</p> <p>PSC Principal Planner</p> <p>PSC Planning Coordinator</p> <p>PSC Plan Reviewer</p> <p>PSC Permits Supervisor</p>

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC System Administrator PSC Permit Technician
PSC Update Permit Attachments that were added by others and self	Update permit attachments that were added by others and by themselves.	PSC System Administrator
PSC Update Permit Attachments that were added by self	Update permit attachments that were added by themselves.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Delete Permit Attachments that were added by others and self	Delete permit attachments that were added by others and by themselves.	PSC System Administrator
PSC Delete Permit Attachments that were added by self	Delete permit attachments that were added by themselves.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC System Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician

These security roles apply to planning application attachments:

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments to submitted planning applications until they are closed.  View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Agency Planning and Zoning Inquiry	View planning and zoning attachments.	PSC Agency Staff – All agency users
PSC Add Planning and Zoning Attachments	Add planning and zoning attachments.	PSC Planning Application Management with Elevated Access PSC Planning Attachments User Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner PSC Plan Reviewer
PSC Update Planning and Zoning Attachments Added by Others and Self	Update planning and zoning attachments added by others and by themselves.	PSC System Administrator
PSC Update Planning and Zoning Attachments Added by Self	Update planning and zoning attachments added by themselves.	PSC Planning Attachments User Duty PSC Apply Planning and Zoning Duty



Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner PSC Plan Reviewer
PSC Delete Planning and Zoning Attachments Added by Others and Self	Delete planning and zoning attachments added by others and by themselves.	PSC System Administrator
PSC Delete Planning and Zoning Attachments Added by Self	Delete planning and zoning attachments added by themselves.	PSC Planning Attachments User Duty PSC Apply Planning and Zoning Duty PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner PSC Plan Reviewer
PSC Delete Planning and Zoning Attachments Added by Self	Delete planning and zoning attachments added by themselves.	PSC Planning Attachments User Duty PSC Apply Planning and Zoning Duty PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Economic Development Officer PSC Cashier PSC Principal Planner PSC Plan Reviewer

**Note:** Applicants and contacts with application access can view and add attachments to their own applications as well as update and delete the attachments they added themselves. 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 application access for the contact type.

For more information on creating roles for Public Sector Licensing and Permits, see *Creating Custom Roles for Public Sector Licensing and Permitting*.

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the *Security Reference for Oracle Public Sector Licensing and Permitting*.

## 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
	Displayed when an applicant uploads a PDF document to a permit or planning application that's in a plan review status. Only Permits or Planning and Zoning agency staff can see the indicator, which is available on the Permits tab only.  The icon is displayed until the document is marked as seen in the Plan Review Console or on the Attachments page, or added to a plan review cycle. The indicator isn't available on phones or in the list view on the Permits tab.
	Click the Select to Preview Attachment icon for PDF files (shown here) or a thumbnail for most types of image files (such as BMP, GIF, JPEG, and PNG) to open the Attachment Preview page.

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

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

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

## Adding Attachments

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

You can also update the attachments that you added on the Permits tab. Agency staff with appropriate permissions can update any attachments on the Permits tab. Attachments can't be updated on the All tab.

**Note:** The maximum file size is 150 MB depending on the page that you're uploading to in Oracle Public Sector Licensing and Permitting. It may take several minutes to upload large files. The maximum file size in the Oracle Inspector mobile app is 25 MB.

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

To download a single attachment from the Attachments page:

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

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

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

## Deleting Attachments

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

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

To delete selected attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.  
You may need to expand the section that includes the Attachments link.
3. Click the **Select Multiple** icon above the grid.
4. Select one or more documents to delete.
5. Click the **Delete** icon.

To delete a single attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.  
You may need to expand the section that includes the Attachments link.
3. In the attachments grid, click the **Action** icon for the document you want to delete.
4. Select *Delete* from the action menu.

## Working with Appeals and Hearings

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

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

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

## Viewing Appeals and Hearings

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

Page Element	Description
<b>Source</b>	<p>Review the details of the record:</p> <ul style="list-style-type: none"> <li>○ Source – Appeal or Hearing</li> <li>○ Responsible Party</li> <li>○ Date of creation</li> </ul>
<b>Hearing Body</b>	<p>Review the name of the hearing body that is assigned to the case hearing.</p>
<b>Hearing Date</b>	<p>Review the date on which the hearing is scheduled.</p>
<b>Status</b>	<p>View the status of the hearing:</p> <ul style="list-style-type: none"> <li>○ <i>Not Scheduled</i>: The hearing is not scheduled.</li> <li>○ <i>Scheduled</i>: The hearing is scheduled.</li> <li>○ <i>Completed</i>: The hearing is completed with a decision outcome.</li> </ul>
<b>Responsible Party</b>	<p>Review the name of the responsible party for the case.</p>
<b>Attachments</b>	<p>View, add, or delete attachments related to the hearing.</p> <p>A numeric value on the badge shows the number of attachments added. If there are no attachments, no value is shown.</p> <p>Click the icon with the badge to open the Attachments page and view the list of attachment files with the details of description and name of the uploader.</p> <p>The <b>Actions</b> menu allows you to view details, download, or delete attachments.</p> <p><b>Note:</b> You can delete only the attachments uploaded by yourself.</p> <p>Click the <b>Add</b> button to upload a new attachment. For details, see <i>Working with Attachments</i>.</p>
<b>Actions</b>	<p>Click to view the actions you can perform on the record, which are based on the status of the case – Hearing or Appeal:</p> <ul style="list-style-type: none"> <li>○ <i>Schedule Hearing</i>: Select to schedule a hearing by selecting a hearing body and an available date.</li> <li>○ <i>Reschedule Hearing</i>: Select to change the hearing date.</li> <li>○ <i>Update Hearing Decision</i>: Select to enter the decision made in the hearing and add corrective actions.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Cancel</i>: Click to cancel the appeal or hearing.</li> </ul>

3. You can also click on an appeal or hearing row to view additional details.

Page Element	Description
<b>Hearing Body</b>	The name of the hearing body that is assigned to the case hearing.
<b>Hearing Date</b>	The date on which the hearing is scheduled.
<b>Hearing Purpose</b>	The purpose for which the hearing is scheduled.
<b>Responsible Party</b>	The name of the responsible party for the case.
<b>Hearing Decision</b>	The decision made on a previous hearing.
<b>Decision Date</b>	The date on which a hearing decision was made.
<b>New Compliance Due Date</b>	The date by which the responsible party must ensure compliance.
<b>Comments</b>	View any comments regarding the appeal or hearing.
<b>Last Updated By</b>	The name of the person who last updated the appeal or hearing details.
<b>Last Updated Date</b>	The date on which the last update to the appeal or hearing was made.
<b>Appellant</b>	The name of the responsible party.
<b>Appeal Date</b>	The date on which the appeal was made.
<b>Appeal By</b>	The date by which an appeal has to be made.
<b>Appeal Reason</b>	The reason for requesting an appeal.
<b>Corrective Actions</b>	The corrective actions taken for the violation found.
<b>Attachments</b>	View attachments related to the hearing.



Page Element	Description
	<p>The <b>Actions</b> menu allows you to view details on the Attachment Details page or delete the attachment. The Attachment Details page gives you the file name, description, name of the uploader and the date on which the file was uploaded.</p> <p><b>Note:</b> You can delete only the attachments uploaded by yourself.</p>

## Adding an Appeal

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

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

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

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

## Adding a Hearing

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

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

Page Element	Description
<b>Appeal Source</b>	View the source of the appeal, which is Hearing

Page Element	Description
<b>Hearing Body</b>	Select the hearing body from the available list.
<b>Hearing Date</b>	Select a hearing date from the available options, which is determined by the schedules of the hearing body and the agency.
<b>Hearing Purpose</b>	Select a purpose for adding this hearing.
<b>Responsible Party</b>	View the name of the responsible party related to the case.

- Click **Save**. The new hearing for the case is scheduled with a case status of *Hearing*, and any scheduled inspection is now available for reschedule on the Inspections page. If there is no scheduled inspection, then the **Schedule Hearing** button is available. For details, see *Working with Code Enforcement Inspections*.

Also, the **Attachment** icon is enabled on the Appeals and Hearings page so that you can add any attachments related to this hearing.

You can reschedule a hearing by changing the date of the hearing. Click the **Reschedule** button available on the hearing record and select the new date of hearing.

The **Reschedule** option is also available on the:

- Code Technician Worklist: On the Hearings tab select Reschedule from the **Actions** menu.
- Code Officer Worklist: On the Hearings tab select Reschedule from the **Actions** menu.

## Updating Hearing Decision

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

- Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab.

Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **Actions** and select **Update Hearing Decision**.

You can also navigate using the case list. Select **Cases** on the Agency Springboard to view a list of all cases. On the Cases page, click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.

- Click the **Action** button on the row of the appeal or hearing you are working with and click **Update Hearing Decision**.

**Note:** This option is not available for a completed appeal row.

3. Enter the decision related information on the Update Hearing Decision page:

Page Element	Description
<b>Hearing Body</b>	View the name of the hearing body assigned for the hearing.
<b>Hearing Date</b>	Select an available date for the hearing.
<b>Responsible Party</b>	View the name of the responsible party for the case.
<b>Hearing Decision</b>	<p>Select the hearing decision from options set up by your administrator.</p> <p>Examples of decision options can be <i>Compliance</i>, <i>Not in Compliance</i>, <i>Continue</i>, <i>No Outcome</i>, and others.</p> <p>If you select the option related to non compliance, you must change the status of the case in the <b>New Case Status</b> field.</p>
<b>Decision Date</b>	Enter the date on which the hearing decision was taken.
<b>New Case Status</b>	<p>Select the new status for the case from the list of available statuses. Depending on the status you select, the workflow stages and their tasks are accordingly updated.</p> <p>The list of transaction statuses along with each of its associated system status are set up by your administrator. See <a href="#">Setting Up Transaction Statuses</a>.</p> <p><b>Note:</b> The <b>Update Status</b> option is available only if your agency has enabled the <b>Available to Manually Select as New Status</b> option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p>
<b>Comments</b>	Enter any text for reference.
<b>New Compliance Due date</b>	Select a date by which the responsible party must ensure compliance. This option appears if the new status of the case is violation, citation or abatement.
<b>New Citation Due date</b>	Select a date by which the responsible party must pay the citation fee. This option appears if the new status of the case is citation.
<b>Corrective Actions</b>	Click <b>Add</b> to open the Corrective Actions page, search and select one or more corrective actions from a list. You can edit the description of each of the actions using the Rich Text formatting option.

Page Element	Description
<b>Attachments</b>	Click <b>Add</b> to open the Attachments page and include any documents.

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

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

## Adding Responsible Parties


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

### Viewing Responsible Parties

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

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

- On the Cases page, select the **View More Details** button for the case you are working with.
- Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.

Page Element	Description
	Indicates that the person is the primary responsible party.
<b>Responsible Party</b>	View the name of the party responsible for the reported violation.
<b>Mailing Address</b>	View the address of the responsible party.  You can view the location of the address on a map at the top of the page.
<b>Email</b>	View the email address of the responsible party.
<b>Phone</b>	View the phone number of the responsible party.
<b>Status</b>	Shows the status of the responsible party – <i>Active</i> or <i>Inactive</i> .
<b>Type</b>	View the type of the responsible party. For example, owner.

Page Element	Description
<b>Online Access Status</b>	<p>Displays the status of the online access that was requested by the responsible party:</p> <ul style="list-style-type: none"> <li>○ <i>Not Requested</i></li> <li>○ <i>Pending Approval</i></li> <li>○ <i>Issued</i></li> <li>○ <i>Denied</i></li> </ul>
<b>Actions</b>	<p>Select from these options:</p> <ul style="list-style-type: none"> <li>○ <i>Allow Access</i></li> <li>○ <i>Deny Access</i></li> <li>○ <i>Inactivate</i>: Access to the case is removed and a communication is sent to the responsible party. The person will not be included in the notice process.</li> </ul> <p>The Access options are available only if a responsible party has requested access to this case. Also, once approved, the <b>Actions</b> menu shows only the <i>Deny</i> and <i>Inactivate</i> options. Similarly, after denying the access, the <b>Actions</b> menu shows only the <i>Approve</i> and <i>Inactivate</i> options. Once the access is issued, the responsible party can access their case details using the Resolve Issue page and take actions such as submitting appeals. See <a href="#">Resolving Issues</a>.</p> <p><b>Note:</b> The Access actions are also available to the assigned code technician on the <b>Access Requests</b> tab in the Code Technician Worklist.</p>

4. To view more information about the responsible party record, click **View Details**. The Responsible Party Details page also gives the date on which the record was created and when it was last updated. If applicable, the detail page shows information about the access request, such as, the name of the person who approved or denied the access request, the date, and any comments.

A separate Online Access section is displayed if the responsible party has requested for online access, using the Resolve Issue page. Review the requester’s user name, email, phone, and the status of online access.

## Managing Online Access Requests

The Online Access Requests section on the Responsible Parties page lists all the responsible parties who have requested access to the case. You can approve or deny the access for each request or drill down to the request details.

To approve an access request, click the **Actions** menu on the record and select Approve Access. On the Approve Access page you select one of the options:

- Link the request to an existing responsible party: Use the checkbox to select a responsible party from the list identified by the agency and click **Save**. The existing responsible party row detail is updated with the email address as per the access request and the online access status changes to *Access Allowed*. The Online Access section shows the details.

- Create a new responsible party: Select the check box and click **Save**. The Add Responsible Party page opens for you to enter the details and save. A new record is added to the Responsible Party grid, with the online access status as *Access Allowed*.

To deny an access request, click the **Actions** menu on the record and select Deny Access. The record is removed from the Online Access Requests grid and a new record is added to the Responsible Parties grid with online access status as Access Denied. To approve the request, you can use the Actions menu on the row and select Approve Request.

Once the request is approved or denied, the record is removed from the Online Access Requests grid.

**Note:** Approved and inactive responsible parties are not listed in the Approve Access page.

## Adding Responsible Parties

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **Add Responsible Party** button. On the Add Responsible Party page, you can add a new responsible party by entering the details or you can click the **Select from Parcel Owners** link to search and select an existing parcel owner record.

**Note:** You must enter a value for the **Type** field if you have selected an existing parcel owner.

5. Select the **Primary** switch if you want to assign the newly added responsible party as the primary responsible party. Such an assignment will automatically update the earlier primary responsible party as not primary.
6. Click **Save** to add the responsible party and return to the list page, which always lists the primary responsible party with an indicator.

New responsible parties are active by default. You can set a responsible party as inactive by using the **Inactivate** option available in the **Actions** menu in each record. Inactive responsible parties are not included in the notices and they will not have access to the case.

## Updating Responsible Party Detail

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, select the **View More Details** button for the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **View More Details** button on the responsible party row to update the details.
5. On the Edit Responsible Party page, enter new values for the fields you want to change.

To enter an address, begin by entering the **Postal Code**. As you enter the code, the type-ahead list shows values that include appropriate state and city combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.

If you don't know the postal code, click the **Don't know** link that appears when the postal code field is blank. Clicking this link displays a full set of address fields.

6. Turn off the **Active** switch if you want to set the responsible party as inactive.
7. The Online Access section appears only if there is an access request from the responsible party, which is pending approval, approved, or denied. You can approve or deny the access depending on the status of the request.
8. Click **Save** to save the changes and return to the Responsible Parties page.

## Working with Citations

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

### Viewing Citations

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

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

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

2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Citations** in the left panel to open the list of citations.

Page Element	Description
<b>Citation ID</b>	View the identifier of the citation.
<b>Description</b>	View the description of the citation as entered at the time of issuing the citation.
<b>Comments</b>	View comments entered at the time of creating the case.
<b>Due Date</b>	View the due date for paying the citation fee.
<b>Created By</b>	View the name of the agency staff who created the case.
<b>Code Violations</b>	View the number of code violations related to the case.

4. Click a citation record if you want to open the Citation Details page and view the details including the list of code violations in their current status and the related citation fees.

### Issuing a Citation

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

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

- Click the **Issue Citation** button to open the Issue Citation page and enter values for the fields:

Page Element	Description
Description	Enter a description about the citation.
Due Date	Enter the due date by which the citation fee must be paid.
Compliance Date	Enter the date by which the responsible party must ensure compliance.
Comments	Enter any optional comments related to the citation.

- The **Code Violations** section lists only those applied code violations that are in open status. Expand a record to view its details and the corrective action.
- Click **Done**. The Citations page now shows the new record.

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

Once a citation is issued, the corresponding citation fee items are listed in the Fees and Payments page, along with the fee amount. The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see [Setting Up Fee Items](#) and [Setting Up Issue Subtypes](#)

For details about a code enforcement inspector issuing citation using a mobile device, see [Overview of Mobile Oracle Municipal Code Officer](#).

## Working with Code Enforcement Fees and Payments

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

### Viewing Fees and Making Payments for a Case

The Fee and Payments page from the case details shows the details of the payments due for the case. Separate fee items are listed based on the source and type of the applicable fees. Payable amounts can include fees for case status changes such as for violation, citation, or any other case status changes.

The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see [Setting Up Fee Items](#) and [Setting Up Issue Subtypes](#).

You use the **Pay** button to open the Pay Fees page and make the payment.

**Tip:** You can also make a payment for a case or citation from the agency springboard by selecting the *Make CE Payments* option in the **I want to** field. Registered public users can make payments for a case or citation using the CE Payments tile on their landing page.



The attributes on the case details – Fees and Payments page are updated once the payment is successful.

To view the fee details for a case and make payment:

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

Page Element	Description
<b>Total Fees, Total Payable, Total Payments in Process, Total Paid, Balance Due, and Pay</b> button	The top section on the page displays the consolidated details for all the fee items displayed in the grid below. Use the <b>Pay</b> button to open the Pay Fees page and pay the total balance due or pay for selected fee items.
<b>Calculate Late Fee</b> button	When there are overdue fee items, a late fee is associated with them, which the responsible party must pay. Click to calculate late fees for fee items, if any.
<b>Fee Source</b>	Shows the source from which the fee item was generated. For example, case status change, citation, and late fee.
<b>Fee Item</b>	The identifier of the fee.
<b>Fee Reference ID</b>	<p>The unique identifier of the fee reference generated for each fee item. The values are generated based on the fee autonumber rule set up on the Code Enforcement Options page.</p> <p><b>Note:</b> The fee reference ID for a late fee will remain same as the value generated for the fee item it is applied on.</p> <p>See <i>Setting Up Agency-Level Options for Code Enforcement</i>.</p>
<b>Amount</b>	<p>The amount due for the fee.</p> <p><b>Note:</b> Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see <i>Setting Up Issue Subtypes</i>.</p>

Page Element	Description
<b>Currency</b>	The currency in which the fees are paid.
<b>Status</b>	Shows the status of the fee payment: <ul style="list-style-type: none"> <li>○ <b>Paid</b></li> <li>○ <b>Processing payment</b></li> <li>○ <b>Due</b></li> </ul>
<b>Due Date</b>	The date by which the payment must be made.
<b>Assessed Date</b>	The date on which the fee was assessed.
<b>Payment Reference ID</b>	The identifier of the payment.

**Note:** Grids are rendered in either a condensed or expanded format based on the FSM option selection made by the agency during implementation. On the Fee and Payments page, each agency staff member can now personalize expanded grids to display information in a manner that suits their own requirement. See *Personalizing Grid Displays*.

## Viewing Fee Item Details

1. Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the case.
4. On the Fees and Payments page, select the fee item for which you want to view details.
5. On the Fee Item Details page, view additional information about the fees such as fee reference ID, description about the fee item, and department. You can edit to make changes to the fields for fee amount, status, department, assessed and due dates, as well as enter comments.

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

## Adding an Ad Hoc Fee Item

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

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

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

## Paying Code Enforcement Fees

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

**Note:** When overdue fee items are present, the late fees for these are automatically calculated as you click the **Pay** button and the total amount to be paid is shown.

5. Click the Information icon next to the **Total Amount to Be Paid** to preview the fee items before making the payment.

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

## Calculating Late Fees

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Cases tab.  
  
Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click **Calculate Late Fee** at the top of the grid.
5. The Calculate Late Fee pop-up window lists only the overdue fee items. Select the fee items for which you want to calculate the late fees.
6. Click **Submit** to return to the **Fees and Payments** page. The page now lists the late fee as a separate record with the same **Fee Reference ID** as its associated fee.

### Related Topics

- [Setting Up Calculate Overdue Case Fee Actions](#)
- [Generating Journal Entries](#)
- [Viewing Accounting Transactions](#)
- [Reviewing Journal Entries](#)
- [Exporting Journal Entries](#)

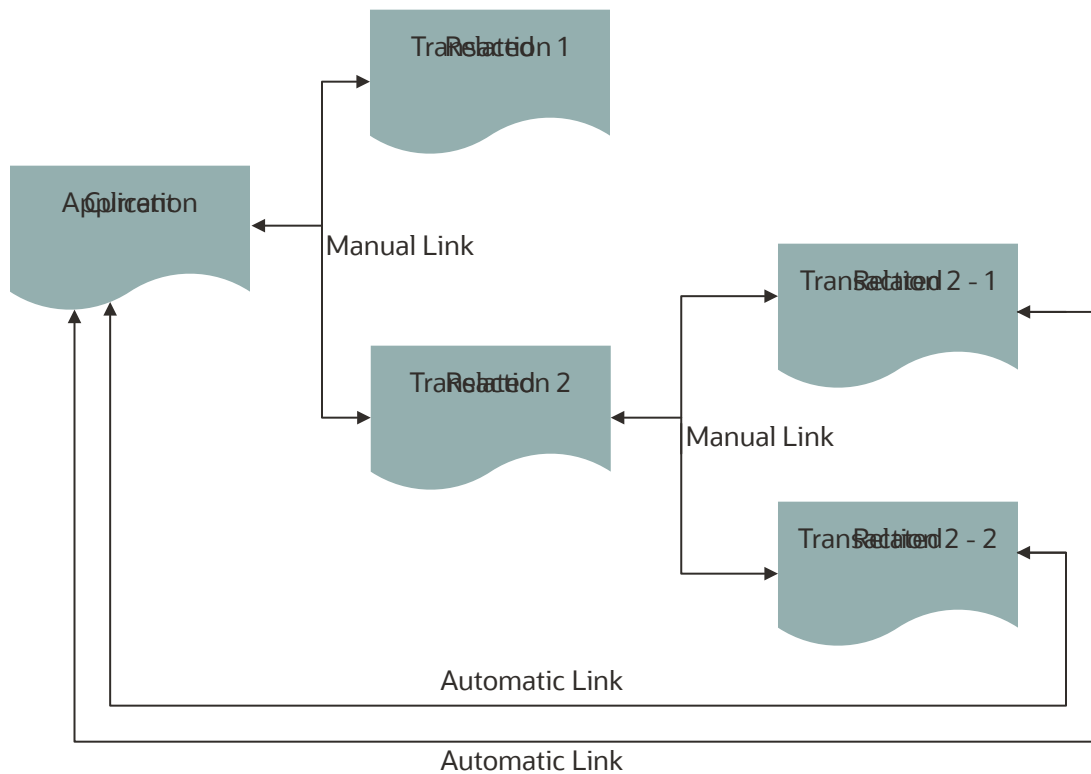
## Working with Related Transactions

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



## Security Details for Working with Related Transactions

This section describes important security roles, requirements, or considerations specific to working with related transactions.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Related Transactions	Manage related transactions.	PSC Agency Staff - All agency users PSC System Administrator
PSC Registered Public users	Manage related transactions. Access is also dependent on the related transactions configuration in agency setup.	PSC Registered Public users

For more information on creating roles for Public Sector Licensing and Permits, see [Creating Custom Roles for Public Sector Licensing and Permitting](#).

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Public Sector Licensing and Permitting](#).


## 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.  <b>Note:</b> 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: <ul style="list-style-type: none"> <li>○ <i>Manual or Automatic</i> linking: The transactions that are manually linked to this application show as <b>Manual</b> and the other transactions that are indirectly linked show as <b>Automatic</b>. 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>.</li> <li>○ <i>Primary or Sub-application</i>: The relationship of the linked transaction with the selected application</li> <li>○ <i>Linked by &lt;user&gt; with &lt;date&gt;</i>: The user (staff or public user) who linked the transaction, with the date of linking.</li> </ul>

Page Element	Description
	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.



# 9 Working with Accounting

## Generating Accounting Transactions and Journal Entries

Depending on the accounting framework implemented by your agency, you use accounting batch processing to generate subledger accounting events or accounting transactions and journal entries from source transactions such as payments and refunds.

Accounting transactions and journal entries are created if the offering-level Accounting Framework Option is *Public Sector Accounting*, and subledger accounting events are created if the offering-level Accounting Framework Option is *Financials Cloud Subledger Accounting*. For more information, see [Selecting an Accounting Framework](#).

Before you run the Generate Accounting process, set up accounting event definitions and accounting rules. Processing includes only source transactions with active accounting event definitions to create subledger accounting events or accounting transactions and journal entries. If an accounting event is enabled for Public Sector Accounting, you must activate the relevant accounting rules to create accounting transactions and journal entries. For more information, see [Managing Accounting Events](#) and [Setting Up Accounting Rules](#).

**Note:** You must enable accounting event definitions for the FeeReceipts and FeeRefunds events to process source transactions in Code Enforcement. These events must also be enabled to support overpayments and payments made with multiple payment methods.

**Note:** If the source transaction is a cash reconciliation adjustment, accounting transactions are created at the time the reconciliation adjustment is made. However, batch processing is required to generate the resulting journal entries. If journal entries aren't created, verify that the ReconAdjustment event definition is enabled.

The transaction status of accounting transactions that are created without journals is *Created*. The status of accounting transactions after journal entries are generated is *Generated*. The Generate Accounting process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.

You set up and run batch processing on the Generate Accounting page, which you can access by selecting **Accounting > Generate Accounting**.

### Entering Generate Accounting Process Parameters

1. Access the Parameters tab on the Generate Accounting page.
2. Use the **Date From** and **Date To** fields to process source transactions such as payments or refunds made during the date range that require accounting. The system configuration determines which source transactions will be processed.

The payment or refund accounting date is based on the next available date in the accounting calendar. You can review the accounting details after processing on the Accounting Transactions page. For more information, see [Viewing Accounting Transactions](#).

## Scheduling the Process

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

Page Element	Description
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>

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

## Setting Up Process Notifications

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

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

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

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

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

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## 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:

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

## 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 <i>Setting Up Data Format Exchange Maps</i> .
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.

### 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:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<b>By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p>

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

## Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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



## Submitting the Process

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

## 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](#).



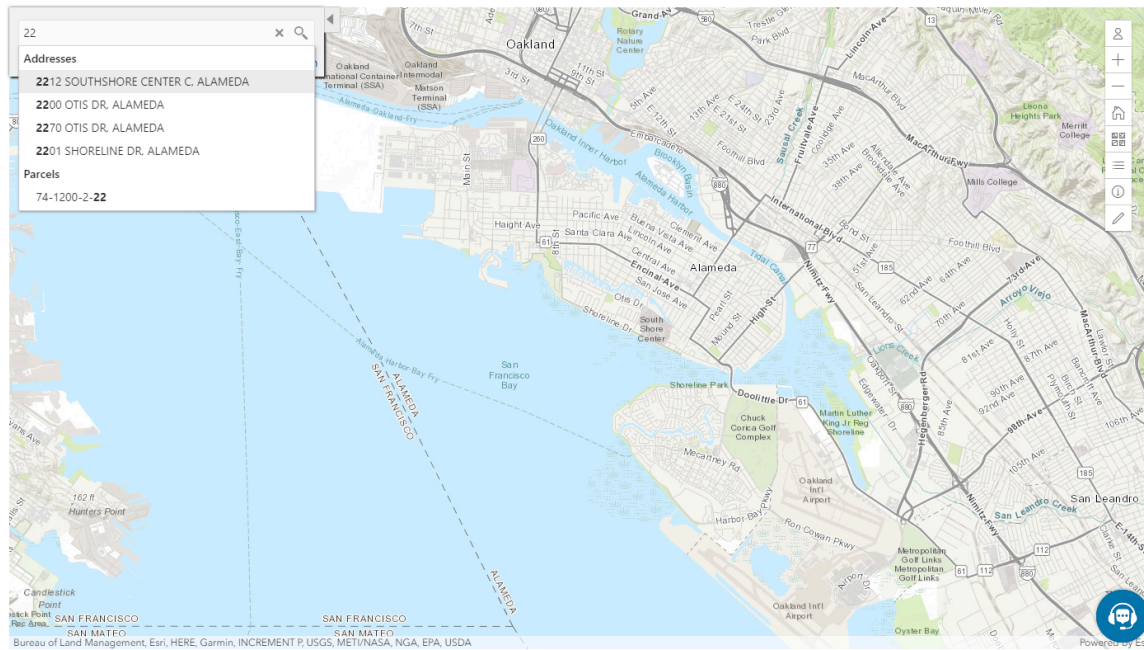
# 10 Working with Maps

## Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. For example, maps can show the locations of parcels and addresses as well as the 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) and configuration in Oracle Public Sector Licensing and Permitting. For more information, see the *Implementing Your Cloud Integrations* guide.

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 Licensing and Permitting system.

### Main Maps

This table lists the main maps that display the agency's business licenses, permits, planning applications, and projects. There are separate maps for different users. For more information, see *Using the Main Map and Explore Your City Map*.

Map Name	Users	Navigation	Usage
Agency main map	Agency staff	Click the Map icon in the page header, then click <b>Main Map</b> in the drop-down menu that appears.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> </ul>

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

## Additional Maps for Applications

This table lists additional maps that support applications:

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

## Maps for Code Enforcement

This table lists additional maps that support code enforcement:

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

Map Name	Users	Navigation	Description
Public - code enforcement	Registered and anonymous public users	On the code enforcement landing page, click the <b>View Recent Issues</b> tile.	View recent code enforcement issues.  See <i>Viewing Recent Issues</i> .

## Maps in Transaction Headers

This table describes the map that appears in transaction headers:

Map Name	Users	Navigation	Description
Transaction header	Agency staff  Registered public users	Access the detail page for the transaction.	The map that appears at the top of various detail pages. For example, this map appears in the detail pages for business licenses, permits, planning applications, projects, incidents, cases, parcels, addresses, and owners.  If the transaction is not associated with a location, the map displays the initial extent that is defined on the map profile.

## Using the Map Toolbar

The general toolbar for maps has tools that relate to the map itself, without regard to specific transactions. This topic describes these general-purpose tools.

**Note:** Use map profiles to configure which tools are available on a map. For information on configuring which tools appear, see *Setting Up Map Profiles*.

These are the generic map tools that can appear on the main toolbar:


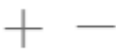






Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options.  When you click this icon, a list of map profiles appears. The list displays the profile name and a thumbnail image of the map that illustrates its general appearance.

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

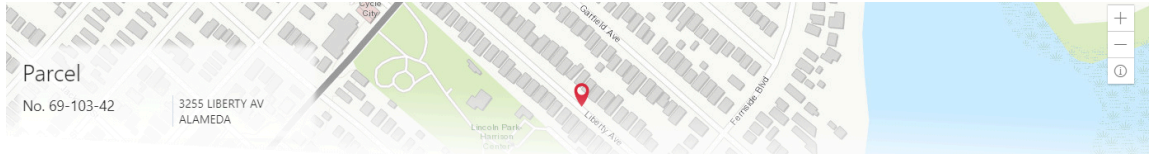
## Viewing Map Markers

Map markers identify the location of an object such as an application, project, incident, case, parcel, or address.

## Marker on the Transaction Header Map

The map in the header of a transaction page shows a single marker for the current object.

This example illustrates the Parcel page, where the map marker shows the parcel's location.

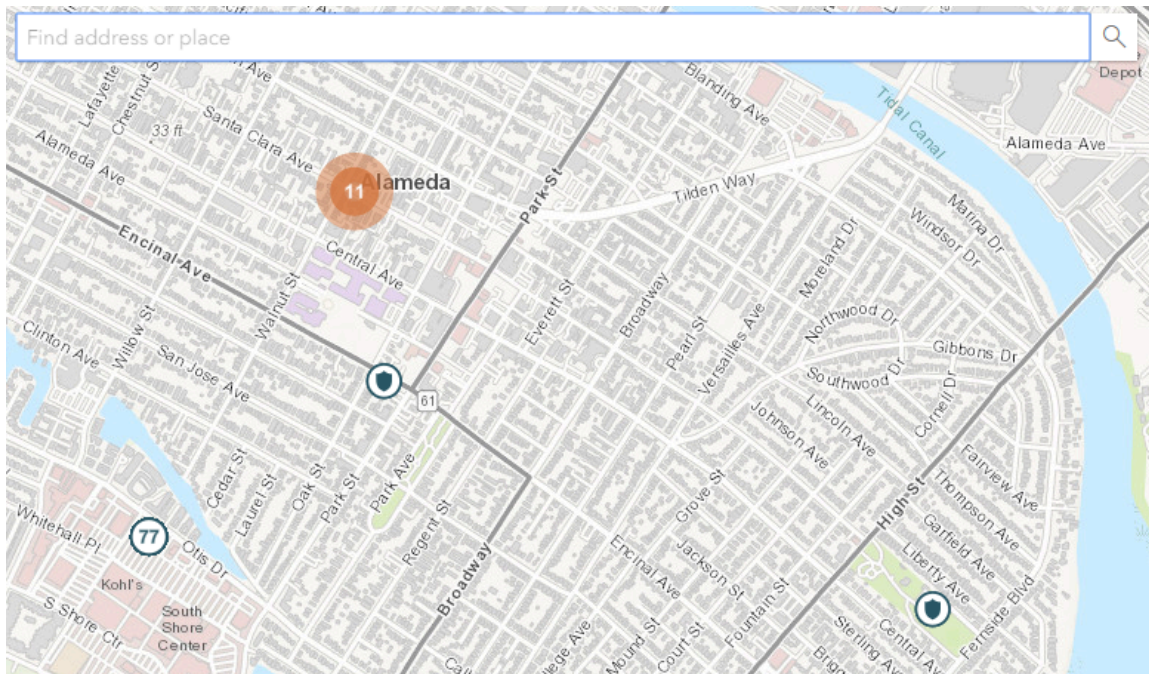


## Other Map Markers


Maps other than the ones in transaction headers have these markers:

- Transaction-specific icons to mark the locations of single transactions.
- Numbered circles to mark locations with multiple transactions.
- Orange-shaded double circles to represent multiple neighboring locations that are clustered together because of the map zoom level.






This example is from the View Recent Issues map, where map markers represent code enforcement issues.



The following table provides a key to the marker icons:

Map Marker	Description
	The location has a single code enforcement issue.



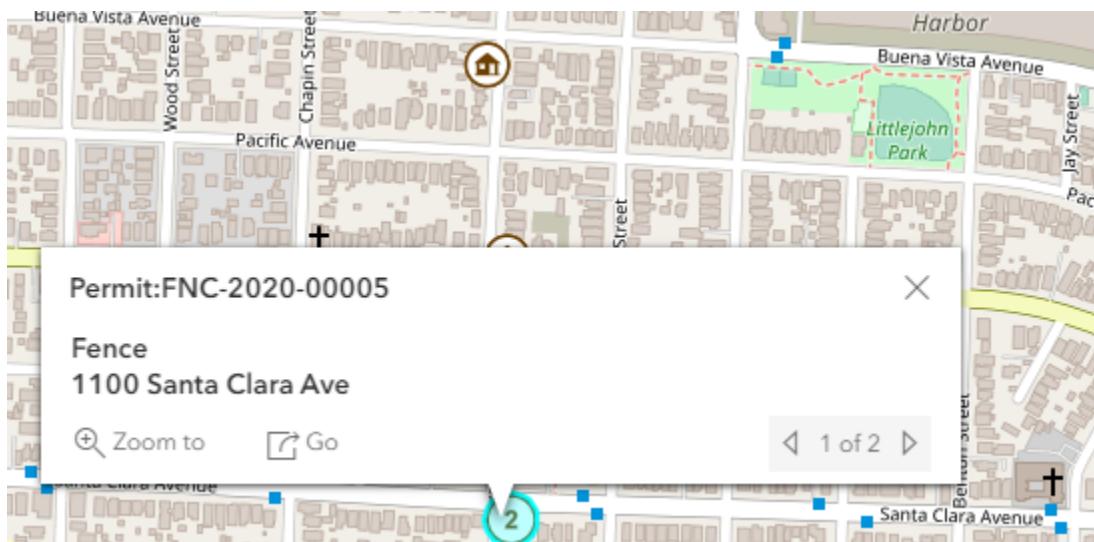
Map Marker	Description
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions.  The marker is the same color as it would be for a single transaction. For example, the marker is brown for multiple business licenses.

## Viewing Details for a Marker

Clicking a marker displays a pop-up window with additional details.

**Note:** If the selection toolbar is visible and a selection tool is active, clicking a marker selects the location rather than opening the details pop-up.

This example illustrates the detailed information for a map marker. The location of the pop-up window depends on the docking settings in the map profile



The detail window includes different information for different objects. Here is some of the information that can appear:

- The object ID

On maps that show multiple types of objects, the object type (such as “Permit”) appears along with the object ID.

- The object status.

Status information appears for incidents and cases, but not for other objects.

- Any applicable categorization, such as a permit type or an issue type and subtype.

- The address for the location.

- Controls for paging through multiple objects, if applicable.

When there are multiple objects, the paging controls appear around the text *<sequence number> of <total number of objects>*.

- A **Zoom To** icon for zooming in on the map location.
- A **Go** icon for opening the corresponding detail page in a new window.

## Using the Main Map and Explore Your City Map

The agency-facing Main Map and the public-facing Explore Your City map provide options for viewing existing applications and projects on the map and for selecting properties so that you can start new applications.

With these maps, users can do the following:

- Select a property and view existing transactions for that property.
- Start an application for a selected property (public users and agency staff only).

Users who aren’t sure what type of application is needed can launch the guide that provides recommendations based on questionnaire answers.

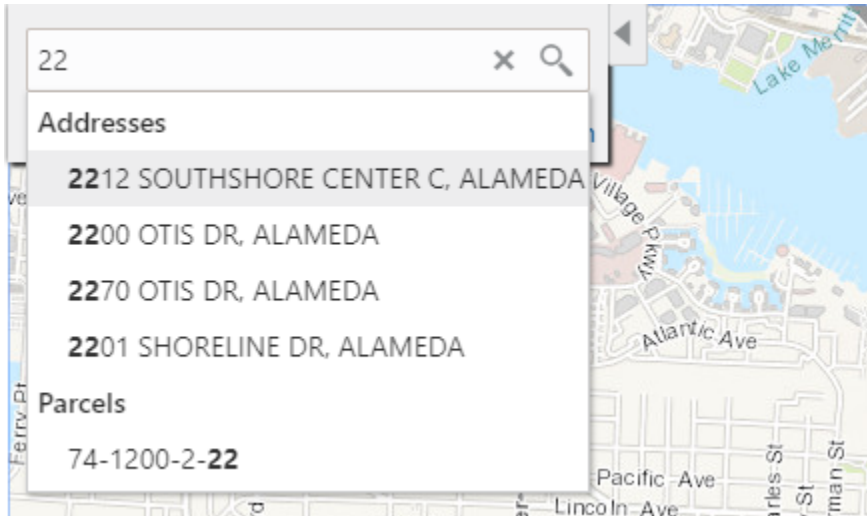
- Search for transactions and view transaction markers on the map.

All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user’s own transactions appear.

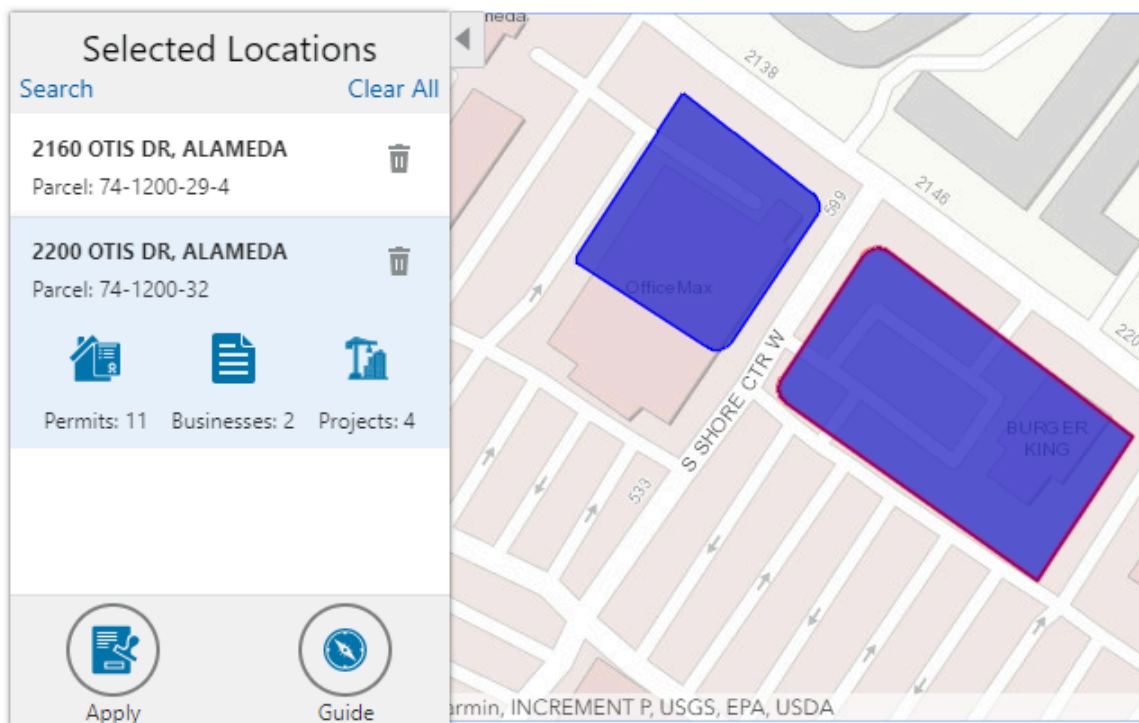
**Note:** To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience. See [Setting Up Map Profiles](#).

## Selecting Properties Using the Basic Search

This example illustrates the basic property search on the map.



This example illustrates the map when properties have been selected.



To search for properties and select them:

1. Enter a full or partial address or parcel number in the search field that appears when you first access the map.

As you type, up to five matching addresses and parcels appear in a type-ahead drop-down list. The type-ahead list includes headings to indicate which items are **Addresses** and which are **Parcels**.


2. Press the Return key or click the magnifying glass icon to perform a full search.  
The Search window expands to show lists for Addresses and Parcels with a count for each type of result. Initially a maximum of five items appears in each list.  
If more results exist, click **More** to show all results in a scrolling list. When the list is expanded, click **Less** to shrink the list back down to five locations.
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
<b>Delete</b>	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
<b>Clear All</b>	Click this link to deselect all properties. The link appears at the top of the list.





## Selecting Properties Using the Selection Toolbar

To select properties directly from the map, without searching, use the drawing tools. You can use the search and the drawing tools together to add properties to (and remove properties from) your list.

To select and deselect properties using drawing tools:

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

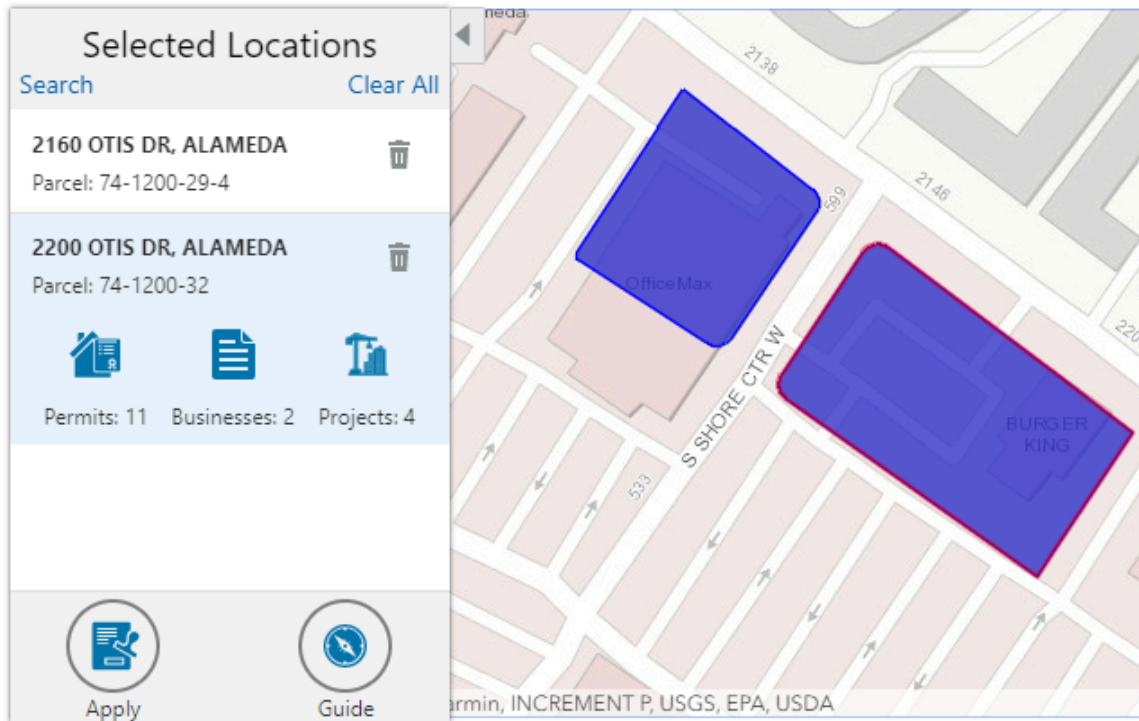
**3.** Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever properties are selected. This is a single list that also includes properties that you adding using the search.

## Using the Selected Locations List

The Selected Locations overlay enables you to review information about selected properties and the transactions that are associated with those properties.

In this example of the Selected Locations list, the addresses and parcel numbers of selected locations are links to the corresponding detail pages. These links are only present for agency staff. When public users see the Selected Locations overlay, the addresses and parcel numbers appear as plain text.



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address. Agency staff can access the detail pages for selected addresses and parcels by clicking the address or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.

**Note:** If an address has multiple parcels, each parcel appears on a separate card and all parcels are selected on the map. If a parcel has multiple addresses, a link below the parcel number indicates the number of addresses. Click the link to see a list of addresses.

2. Click a card to select it and learn more about the property.

If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits, Planning Applications, Businesses** (business licenses), **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.

- To start an application for the selected properties, click the **Apply** button (not available to anonymous users).

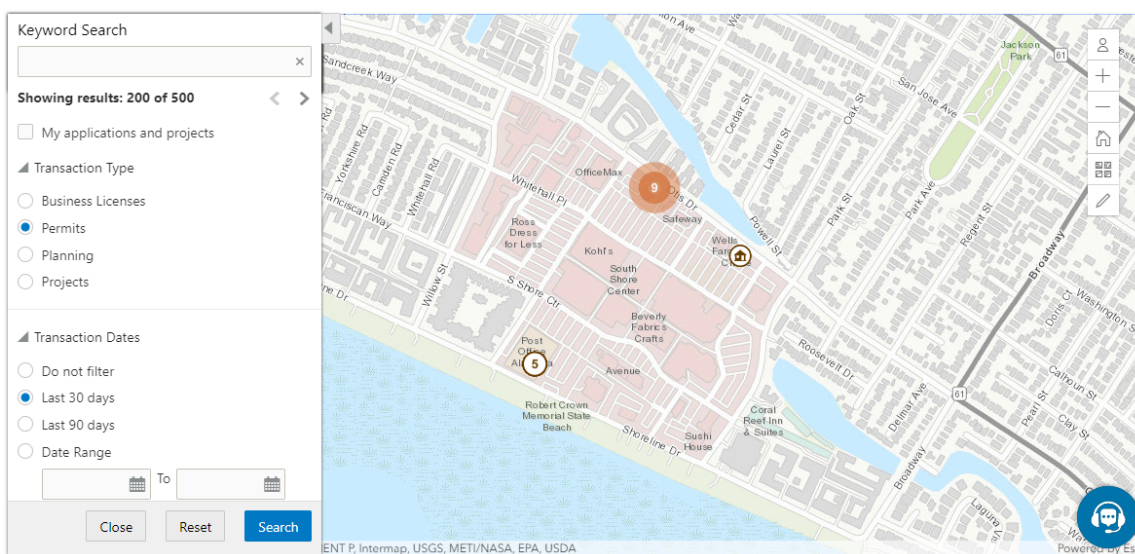
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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:

- Click the **Advanced Search** link on the basic search overlay.  
A new overlay appears.
- 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.
- 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:

- o The application submission date must fall in the specified time period.
- o 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.

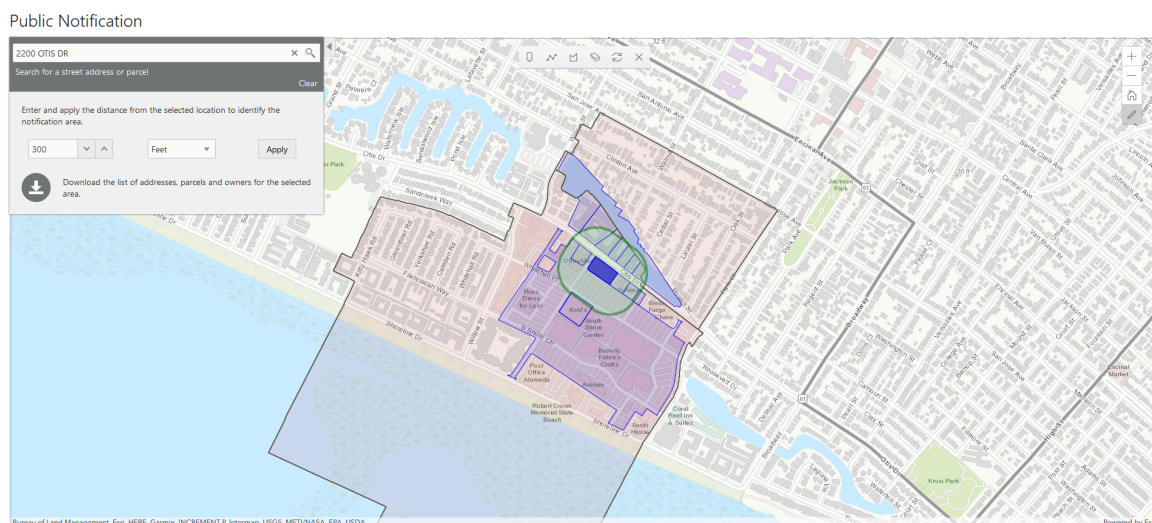
6. To clear search criteria, click **Reset**.
7. To close the advanced search and return to the simple location search, click **Close**.

## 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.

# 11 Working with Reports

## Generating Reports

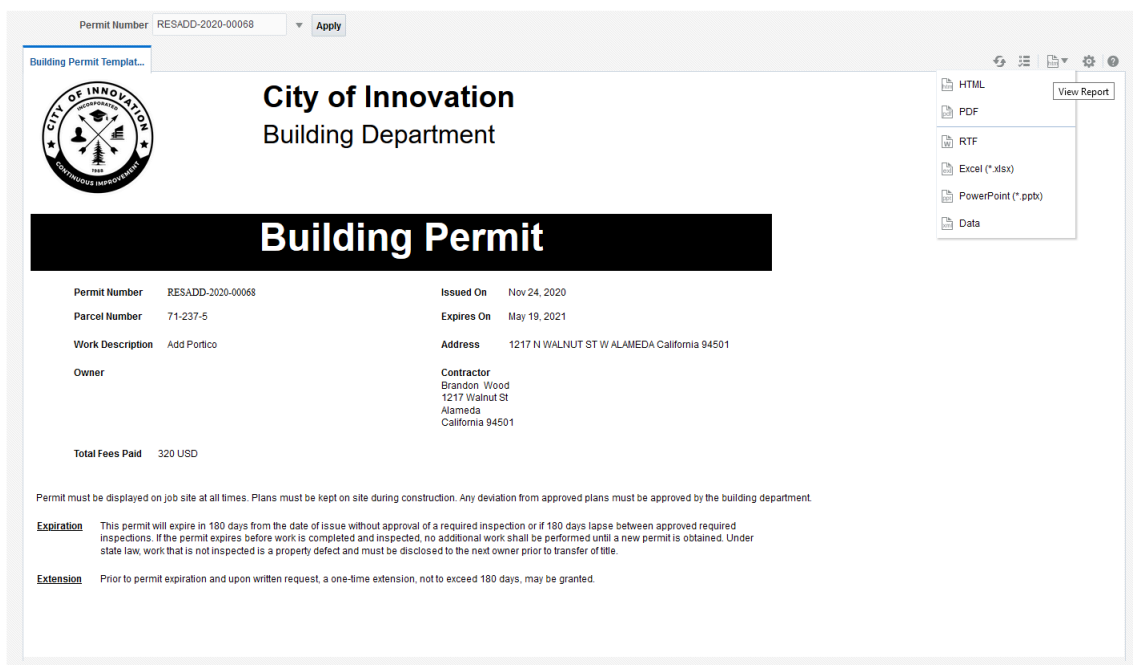
Agency staff have the option of generating BI Publisher reports from a central location instead of navigating to the various pages where reports are found. The report list includes all reports, such as permit activity, building permits, business license certificates, receipts, deposit slips, inspection summaries, code enforcement case history, and many more.

You can only access the reports that are available to you based on the permissions setup for the reports in the BI catalog. System administrators can generate all reports and also edit them. For more information about setting up permissions, see [Granting Catalog Permissions](#).

For a list of delivered reports, see [Public Sector Compliance and Regulation Analytics](#).

This example illustrates the generated report for a building permit from the report list.

The report generated with the selected parameters appears on the left and the view options are accessible through the View Report menu on the right.



Here's how to generate a report from the Report List page:

1. Click the Reports and Analytics icon in the global header on the agency springboard. Select the **Report List** link. Or select **Common > Report List** in the Navigator.
2. Expand the Public Sector section in the left panel of the Report List page.
3. Click the category that the report is filed under. For example, you'll find the Building Permit Report in the Permits category.
4. Click the report name in the right panel. The report loads in a new browser tab.

5. Select values for the available parameters and click **Apply**. For example, if you're logged in as a cashier, you can enter the session ID and reconciliation ID for the Cashier Session Reconciliation Report. Processing generates the report in the browser window in HTML.
6. Click the **View Report** icon in the upper right corner of the page to open the generated report in PDF in your browser. You can also open the generated report as a file by selecting RTF, Excel, or PowerPoint. To open the report in XML without a stylesheet, select the Data option.
7. If you're a system administrator, you can click the **Actions** icon to edit the report.

# 12 Using Accessibility Features

## Overview of Accessibility

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

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

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

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

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

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

## Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

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

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

## Using the Keyboard with Data Collections

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

### Tables

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

### Country

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

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

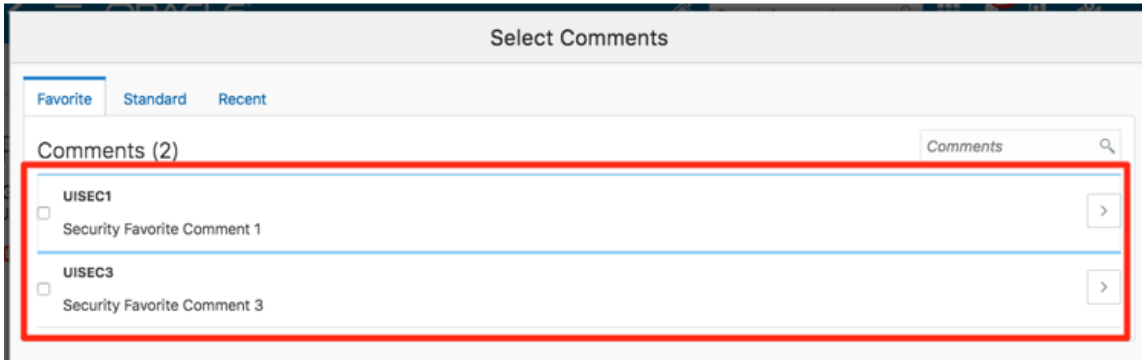
Target	Key	Description
Cell	Tab	<p>The first Tab into the table moves focus to the first column header.</p> <p>The second Tab moves focus to the next focusable element outside of the table.</p> <p>If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row.</p> <p>If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.</p>
	Shift+Tab	<p>The first Shift+Tab into the table moves focus to the first column header.</p> <p>The second Shift+Tab moves focus to the previous focusable element outside of the table.</p> <p>If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row.</p> <p>If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.</p>
	Down Arrow	Move focus to the next row.
	Shift+Down Arrow	Select and move focus to the next row.

Target	Key	Description
	Up Arrow	Move focus to the previous row. If at the first row, then move to the column header.
	Shift+Up Arrow	Select and move focus to the previous row.
	Home	Move focus to first row.
	End	Move focus to last row.
	Space	If chevron icon is used, drill down to the detail.
	Enter	Toggle the current row to actionable mode if there exists a tabbable element in the row.  Once toggled to actionable mode, focus will be moved to be first tabbable element in the row.
	F2	Toggle the current row to actionable mode if there exists a tabbable element in the row.
Column Header	Tab	Navigate to next focusable element on page (outside table).
	Shift+Tab	Navigate to previous focusable element on page (outside table).
	Down Arrow	Move focus to the first row.
	Left Arrow	Move focus to previous column header.
	Right Arrow	Move focus to next column header.
	Home	Move focus to first column header.
	End	Move focus to last column header.
	Space	Select column.

## List View

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





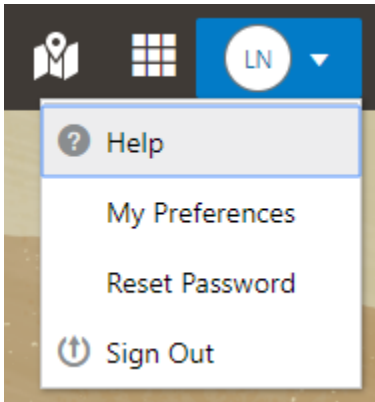
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item, unless the item is already selected.

# Using the Keyboard to Work with Page Controls

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

## Buttons

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



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

## Calendar

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

Auto Number Rule | Electrical Permit 🔍

\* Valid from Date  📅

Valid to Date 📅

Public User Enabled

\* Department

Workflow Space Name

Workflow Application ID

< July 2018 >

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

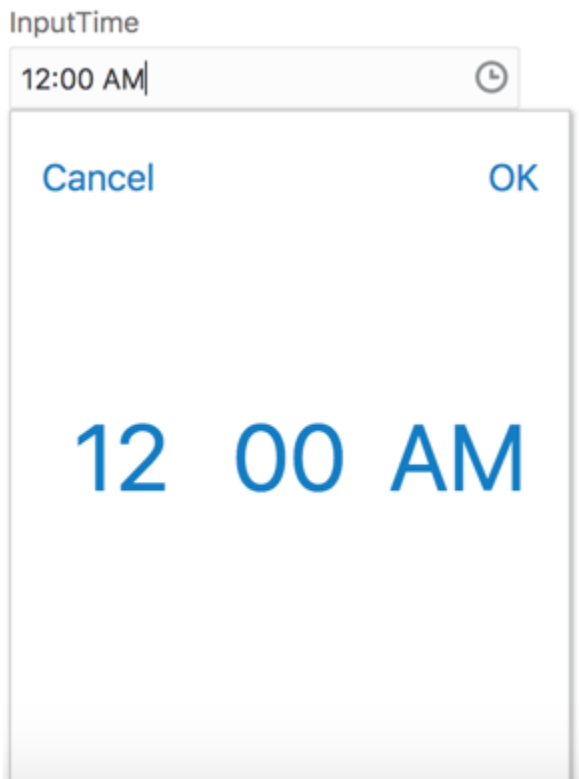
Today

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

Target	Key	Description
	Esc	Close the grid.
	Home	Move focus to first day of the month.
	End	Move focus to last day of the month.
	Page Up	Switch to previous month.
	Page Down	Switch to next month.
	Alt+Page Up	Switch to previous year.
	Alt+Page Down	Switch to next year.
	Ctrl+Alt+T	Places focus on the Today button if it exists.

## Time

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



Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker
Tab In	Set focus to the input. If hints, title, or messages exist in a note window, displays the note window.

## Accordion

This section describes the hot keys you can use when working with the accordion control to expose and access items. An accordion is a set of expandable sections where only one section can be expanded at a time. When a new section gets expanded, the previous section automatically closes.

### Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements

Group box

Text field

Number field

Date time field

Switch

Text area

Radio button set

Check box set

Drop-down list

Multi-Select list

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

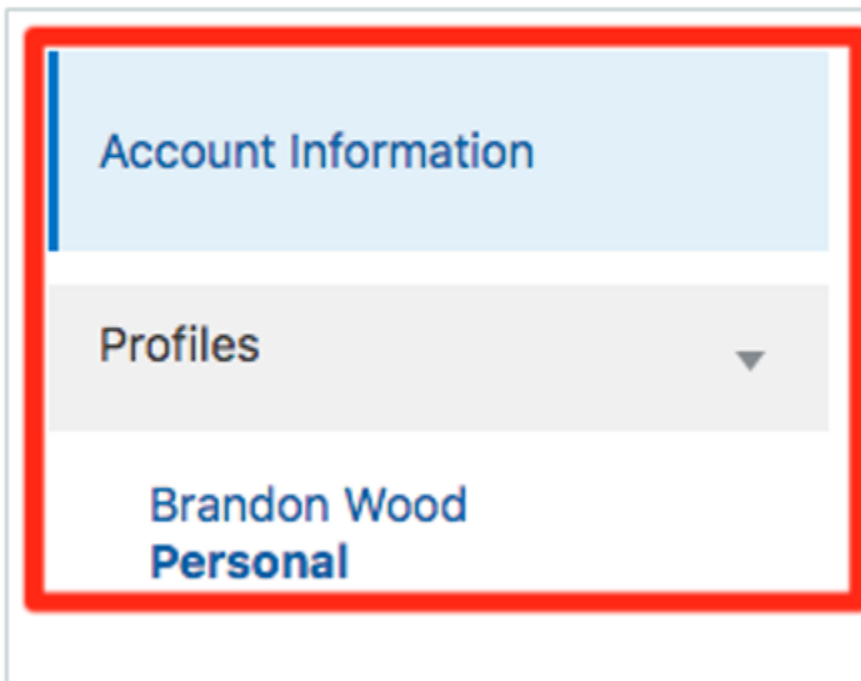
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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

Key	Description
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.
Home	Move focus to the first collapsible header.
End	Move focus to the last collapsible header.

## Navigation Lists

This section describes how to use the keyboard to work with navigation lists to access items used take you to different locations or display additional content.

# Manage Account



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

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

Key	Description
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift+Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

## Tab Bars

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



Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.

Key	Description
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl+X	Marks the current item to move if the reorderable feature is enabled.
Ctrl+V	Paste the item that are marked to directly before the current item
Delete	Delete the current item.