

# Oracle Public Sector Licensing and Permitting

---

**Using Community Development  
Planning and Zoning**

22B

Copyright © 2022, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

|  |           |
|--|-----------|
| <b>Preface</b>   | <b>i</b>  |
| <hr/>  |           |
| <b>1 Managing Public Users</b>                                     | <b>1</b>  |
| <hr/>  |           |
| The Public User Registration Process                               | 1         |
| Overview of Public User Accounts                                   | 5         |
| Accessing Public User Account Information                          | 6         |
| Managing Public User Accounts                                      | 7         |
| Verifying Public User Information                                  | 19        |
| Managing Account Conditions  | 21        |
| Overview of Public Landing Pages                                   | 26        |
| <b>2 Completing a Planning Application</b>                         | <b>31</b> |
| <hr/>  |           |
| Security Details for Completing a Planning Application             | 31        |
| Choosing an Application Type                                       | 31        |
| Getting an Online Fee Estimate                                     | 36        |
| Completing an Application  | 36        |
| Making Payments  | 40        |
| <b>3 Using the Agency Springboard and Worklists</b>                | <b>43</b> |
| <hr/>  |           |
| Using the Agency Springboard                                       | 43        |
| Using the Planner Worklist   | 46        |
| Managing Tasks   | 49        |
| <b>4 Managing Applications for Planning and Zoning</b>             | <b>53</b> |
| <hr/>  |           |
| Security Details for Managing Applications for Planning and Zoning | 53        |
| Managing Transactions  | 53        |
| Copying an Application   | 60        |
| Canceling an Application   | 62        |
| Navigating to Planning Application Details                         | 64        |
| Viewing the Planning Application Detail Overview                   | 67        |
| Withdrawing an Application   | 70        |

|   |            |
|---|------------|
| Reopening a Permit or Planning Application                        | 71         |
| Working with Planners   | 72         |
| Working with Property Information                                 | 74         |
| Viewing Application Information                                   | 79         |
| Using Workflow  | 80         |
| Working with Reports  | 96         |
| Working with Meetings   | 98         |
| Working with Pre-application Outcome                              | 104        |
| Working with Conditions of Approval                               | 106        |
| Working with Contractors and Agents in Applications               | 111        |
| Working with Public Hearings                                      | 113        |
| Generating a Hearing Notifications List                           | 120        |
| Working with Appeals  | 121        |
| Adding Contacts to Applications                                   | 123        |
| Applying Conditions to Applications                               | 128        |
| Working with Attachments  | 132        |
| Working with Comments   | 141        |
| Working with Fees and Payments                                    | 147        |
| Viewing Project Summaries   | 152        |
| Working with Communications                                       | 153        |
| Working with Ad Hoc Communications                                | 160        |
| Viewing Application Status History                                | 164        |
| Working with Related Transactions                                 | 165        |
| <b>5 Working with Planning Application Expiration</b>             | <b>171</b> |
| Security Details for Working with Planning Application Expiration | 171        |
| Expiration Overview   | 171        |
| Working with Application Expiration                               | 174        |
| Updating Application Expiration Status                            | 175        |
| <b>6 Recording and Billing Time</b>                               | <b>179</b> |
| Security Details for Recording and Billing Time                   | 179        |
| Adding Time Entries   | 180        |
| Assessing Fees for Time Entries                                   | 182        |
| <b>7 Managing Plan Reviews</b>                                    | <b>185</b> |
| Security Details for Managing Plan Reviews                        | 185        |

|   |            |
|---|------------|
| Plan Review Overview  | 187        |
| Managing Plan Review Cycles                                   | 188        |
| Using the Plan Review Console                                 | 190        |
| Working with Electronic Plan Reviews                          | 195        |
| Managing Plan Reviewers                                       | 195        |
| Managing Plan Review Documents                                | 197        |
| Performing Plan Reviews                                       | 198        |
| Managing Plan Review Comments                                 | 201        |
| <b>8 Managing Projects</b>                                    | <b>203</b> |
| Security Details for Managing Projects                        | 203        |
| Using Projects  | 205        |
| Adding a New Project  | 206        |
| Viewing and Updating Project Details                          | 208        |
| <b>9 Tracking Planning Application Activities</b>             | <b>217</b> |
| Security Details for Tracking Planning Application Activities | 217        |
| Overview of Activity Tracking for Planning Applications       | 217        |
| Working with Planning Application Activities                  | 219        |
| <b>10 Managing Property Information</b>                       | <b>223</b> |
| Security Details for Managing Property Information            | 223        |
| Viewing Transactions Associated with a Parcel                 | 223        |
| Working with Property Attachments                             | 225        |
| Applying Conditions to Parcels and Addresses                  | 227        |
| Working with Parcel Genealogy Transactions                    | 230        |
| Reconciling Provisional Parcels                               | 232        |
| <b>11 Managing Contractor Information</b>                     | <b>237</b> |
| Security Details for Managing Contractor Information          | 237        |
| Contractor License Overview                                   | 239        |
| Adding Licenses to an Application Form                        | 240        |
| Working with Contractor Licenses                              | 242        |
| Adding Contractor Licenses                                    | 244        |
| Managing Contractor License Details                           | 247        |
| Viewing Contractor License Use                                | 249        |

|  |     |
|--|-----|
| Managing Authorized Agents                 | 250 |
| Applying Conditions to Contractor Licenses | 251 |

## **12 Working with Maps** **255**

---

|  |     |
|--|-----|
| Overview of Delivered Maps                   | 255 |
| Using the Map Toolbar                        | 258 |
| Viewing Map Markers                          | 259 |
| Using the Main Map and Explore Your City Map | 262 |
| Creating Map-Based Public Notification Lists | 268 |

## **13 Working with Payments** **271**

---

|  |     |
|--|-----|
| Security Details for Working with Payments | 271 |
| Payment Flow Overview                      | 271 |
| Working with Cashier Sessions              | 273 |
| Reconciling Cashier Sessions               | 274 |
| Printing Deposit Slips                     | 277 |
| Viewing Payment History                    | 278 |
| Viewing Invoice History                    | 280 |
| Viewing and Processing Refunds             | 281 |
| Viewing Payments On Account                | 284 |
| Creating Oracle Receivable Receipts        | 285 |

## **14 Working with Accounting** **289**

---

|  |     |
|--|-----|
| Generating Accounting Transactions and Journal Entries | 289 |
| Viewing Accounting Transactions                        | 292 |
| Reviewing Journal Entries                              | 293 |
| Exporting Journal Entries                              | 294 |

## **15 Working with Processes** **299**

---

|                           |     |
|---------------------------|-----|
| Using the Process Monitor | 299 |
|---------------------------|-----|

## **16 Using the Digital Assistant** **301**

---

|                               |     |
|-------------------------------|-----|
| Overview of Digital Assistant | 301 |
| Asking Details                | 301 |
| Asking Questions              | 301 |

|   |            |
|---|------------|
| <b>17 Using Accessibility Features</b>        | <b>303</b> |
| Overview of Accessibility                     | 303        |
| Using General Keyboard Shortcuts              | 303        |
| Using the Keyboard with Data Collections      | 304        |
| Using the Keyboard to Work with Page Controls | 308        |





# 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

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

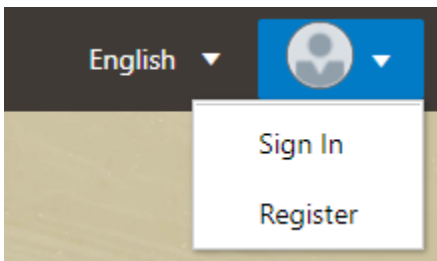


# 1 Managing Public Users

## 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

## 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.<br><br>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.<br><br>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><br/>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><br/>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:

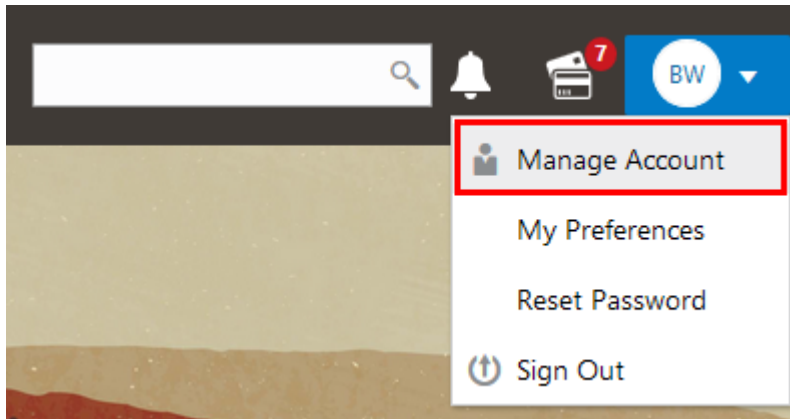
1. Sign in to access the registered public user landing page.



- 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.



- 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<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>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.<br><br>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.<br><br>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.<br><br>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><br/>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><br/>Although public users and agency staff can both see the verification status, only agency staff can update the value.</p> |

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

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

## Updating Trust Accounts

The Trust Accounts section of 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.

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

The Trust Account Details page opens.

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

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

| 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><br/>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 <i>Setting Up Document Categories and Subcategories</i> and <i>Setting Up Document Groups</i>.</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] )

Download icon

| 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<br><b>License Type</b> Electrical<br><b>Issued On</b> 1/1/18<br><b>Expiration Date</b> 1/1/20 | Pending verification ▼ |

Cancel Save

## Managing Verification Requests

To find and manage pending verification requests:

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

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

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

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

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

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

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




- 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.
- Click the **Save** button.

## Managing Account Conditions

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

Agencies define the conditions that their staff can apply to accounts or account profiles. A condition's rules control which activities are limited by the condition. These rules relate to objects such as addresses, parcels, transactions, and contractor licenses in addition to accounts. For information about these rules, see [Setting Up Conditions](#).

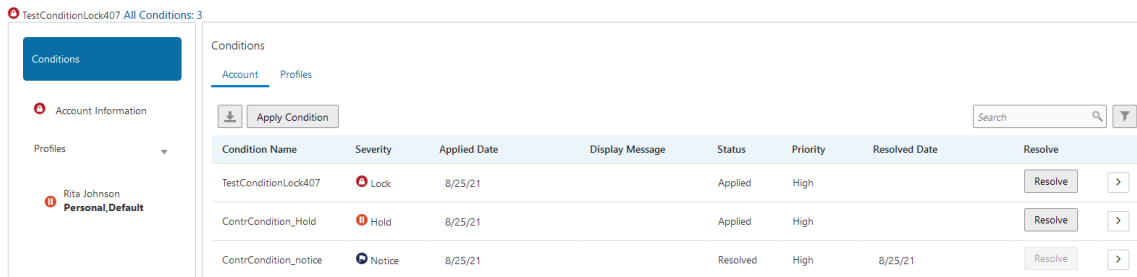
A condition's severity determines how the condition affects activities. This table describes each severity level.

| Severity | Icon  | Description   |
|----------|---|---|
| Lock     |  | The user is prevented from completing any of the activities that are affected by account or profile conditions.                         |
| Hold     |  | The agency user who applies the condition chooses which activities to prevent. You'll see warning messages only for the selected rules. |
| Notice   |  | The user receives warning messages when attempting any of the activities that are affected by account or profile conditions.            |

## Viewing Conditions and Condition Indicators

This example shows condition indicators on the Manage Account page.

Manage Account



To view active conditions for a public user account:

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

The Public User Access page displays lists summary information about public user accounts. If an account or the account profile has active conditions, the icon for the most severe condition appears before the user’s name.

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

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

| Page Element              | Description   |
|---------------------------|---|
| <b>Account or Profile</b> | Displays <i>Account</i> if the condition was applied to the overall account. Account-level conditions are enforced for the account profile.<br><br>Displays the profile name if the condition was applied to the account profile. |
| <b>Display Message</b>    | Displays an agency-defined message with information about the condition.  |

5. Review any icons next to the account or profile name in the left frame.  
The icons indicate the highest level of severity of the active conditions for the account or profile.
6. (Agency staff only) Click the Conditions tab in the left frame.  
This tab is not visible to public users.
7. In the right frame, click the **Account** and **Profiles** links to toggle between a list of account-level conditions and profile-level conditions.

These lists include resolved conditions as well as active conditions.

The following procedures provide instructions for adding conditions, resolving conditions, and reviewing.

## Adding Conditions

To add account and profile conditions:

1. Access the Manage Account page.



2. Click **Conditions** in the left frame.
3. In the right frame, click either **Account** or **Profiles** depending on whether you want to add the condition to the overall account or to the profile.
4. Click **Apply Condition**.
5. If this condition applies to the profile or person:
  - a. Expand the **Select One or More Profiles** section.
  - b. Select the **Apply Condition** check box for the profile that will be subject to the condition.
6. Enter the following condition information:

| Page Element           | Description  |
|------------------------|--|
| <b>Condition Name</b>  | <p>Select one of the conditions that the agency has defined.</p> <p>After you select a condition, the condition information is brought in as it was defined by your agency administrator. You can override the default rules, priority, description, and additional information to customize the condition.</p>  |
| <b>Display Message</b> | <p>Displays an informational message that also appears in the list of all active conditions for an account.</p>  |
| <b>Severity</b>        | <p>Displays the severity of the selected condition:</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>   |
| <b>Condition Rules</b> | <p>Displays check boxes for indicating which actions are locked down. If a check box is not selected, the action is permitted.</p> <p>The check boxes are selected and read-only if the severity is <i>Lock</i>. They are hidden if the severity is <i>Notice</i>.</p> <p>If the condition severity is <i>Hold</i>, the selected check boxes are brought over from the condition definition. You must select at least one check box.</p> <p>The <b>Prevent Application Progress</b> check box is always visible because all conditions affect new applications.</p> <p>Check boxes for these condition rules are visible only if the <b>Apply Conditions to Transactions</b> switch is enabled.</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> </ul> |

| Page Element                  | Description   |
|-------------------------------|---|
|                               | <ul style="list-style-type: none"> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> |
| <b>Priority</b>               | Select <i>High, Medium, or Low</i> .  |
| <b>Description</b>            | The default description comes from the condition definition, but you can change this description as needed.   |
| <b>Additional Information</b> | Enter any additional information or notes regarding the condition that you're applying.   |

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

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

8. Click **Save**.

## Resolving Conditions

To resolve a condition:

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

You need to expand the profile section to see the conditions. The title of the profile section includes the number of active conditions as well as the profile name.

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

3. Locate the condition to be resolved.  
The condition lists include both active and resolved conditions. Active conditions appear at the beginning of the list and have a status of *Applied*.
4. Click the **Resolve** button.
5. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created.  
You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.
6. Use the **View Impacted Transactions** link to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
7. Click **Save** to apply the resolution and close the window.  
The resolved condition moves to the end of the condition list.

## Viewing or Updating Condition Details

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

You need to expand the profile section to see the conditions. The title of the profile section includes the number of active conditions as well as the profile name.

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

3. Review summary information for conditions.  
Active conditions are listed before resolved conditions.  
In addition to the condition name, the severity, and the display message, the following information appears:

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

| Page Element | Description |
|--------------|-------------|
|              |             |

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

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

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

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

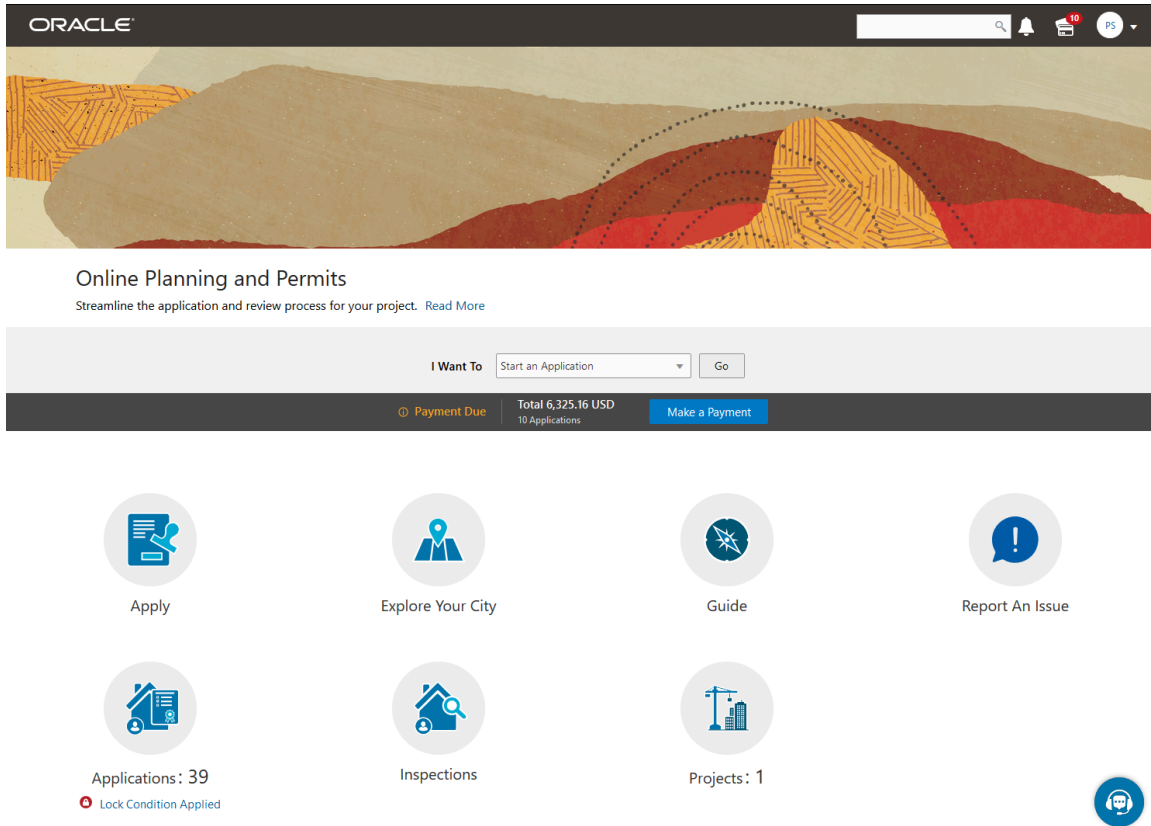
5. Click **Cancel** to return to the Conditions page.

## Overview of Public Landing Pages

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

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

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



## Landing Page Configuration

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

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

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

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

## Tiles on the Anonymous User Landing Page

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

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

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

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

## Tiles on the Registered User Landing Page

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

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

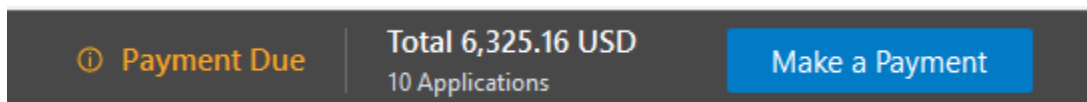
| Menu Link              | Description  |
|------------------------|--|
| <b>Report an Issue</b> | <p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any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

| Menu Link                | Description   |
|--------------------------|---|
| <b>Projects</b>          | <p>Displays a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact.</p> <p>This tile is hidden from users who do not have any projects.</p> <p>The number of active and completed projects appears in the tile label.</p>   |
| <b>Businesses</b>        | <p>Displays a list of the businesses associated with the user's business licenses. This tile is visible only if the user has at least one active business. The number of active businesses appears in the tile label.</p> <p>Users can review summary information about a business and click an individual business for additional details.</p> <p>The list displays the business ID, legal name, mailing address, and location.</p>  |
| <b>Business Licenses</b> | <p>Displays a list of the user's own business licenses. The tile is visible only if the user has at least one active business license. The number of active business licenses appears in the tile label.</p> <p>The list displays summary information about licenses, including the license ID, license type, license status and expiration, the license period, the business name and physical address, a description, and fee information. The user can also initiate an amendment or renewal from the list.</p> <p>The <b>Show All Statuses</b> switch toggles between a list of active licenses and all licenses.</p> <p>Users can click individual licenses for additional details or to take any actions such as viewing the certificate.</p> |

## The Make a Payment Banner

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

This example illustrates the Make a Payment banner.



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

Only a registered user's own applications are reflected in the banner. Their Applications list page shows all of their applications, including the ones for which they are contacts. Agencies must enable full application access for contacts to see these applications in the list.

## The Digital Assistant Button

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

This image shows the digital assistant button.



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

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



## 2 Completing a Planning Application

### Security Details for Completing a Planning Application

This topic describes important security roles, requirements, or considerations specific to completing a planning application.

| Primary Role                  | Access Description             | Associated Job Roles and Abstract Roles   |
|-------------------------------|--------------------------------|---|
| PSC Apply Planning and Zoning | Submit a planning application. | PSC Registered Public User<br>PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Cashier<br>PSC Business Analyst<br>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](#).

### Choosing an Application Type

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

### Working With the Apply Page

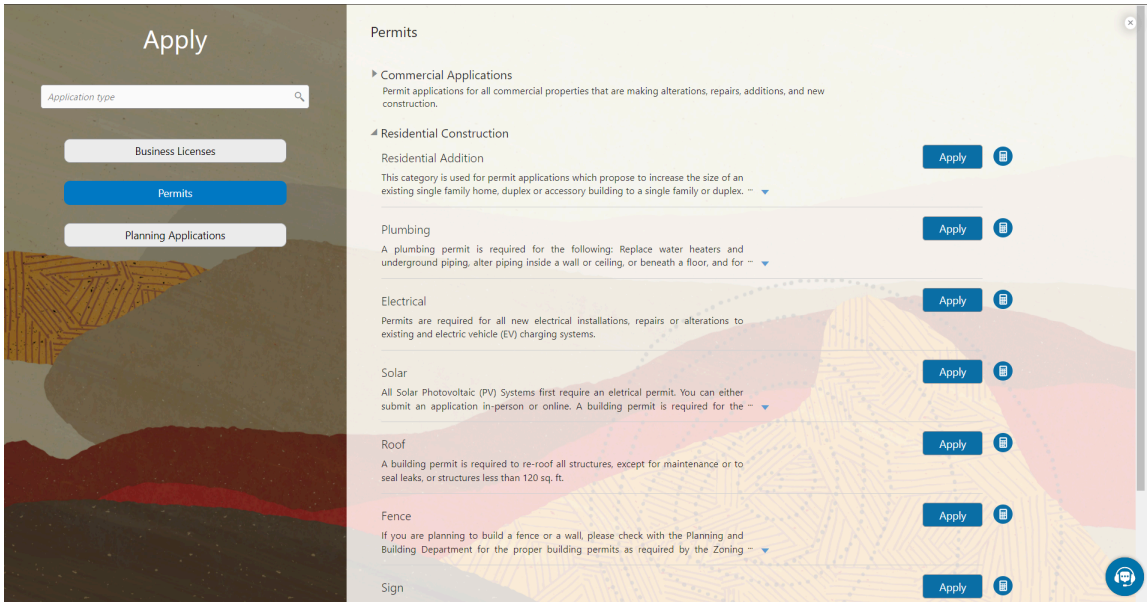
The Apply page offers these options for finding application types:

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

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



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



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

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

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

## Accessing the Apply Page

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

Registered users and agency staff have these additional options

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

## Searching for Application Types By Name

To search for an application type by name:

1. Click in the search field.

A drop-down list shows any matches.

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

## Searching for Popular and Recent Application Types

To search for popular and recent application types:

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

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

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

## Browsing for Application Types

To browse for application types:

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

## Using a Guided Questionnaire to get Application Type Recommendations

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

To find application types using a guided questionnaire:

1. Click the **Guide** button to open the guided questionnaire.

This button appears only if the agency has configured an Oracle Intelligent Advisor policy for recommending application types.

2. Step through the questionnaire.

At the end of the questionnaire, the guide will recommend application types and provide an option to save the recommendations.

3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

- a. Enter a nickname for the recommendations in the **Nickname** field.
- b. Click **Save**.

The recommendations are associated with the user account and can be retrieved from the Apply page.

An anonymous user follows these steps to save the recommendations:

- a. Enter an email address in the **Email ID** field.
- b. Enter a nickname for the recommendations in the **Nickname** field.
- c. Click **Save**.

The system sends the user an email with an acknowledgement number that can be used to retrieve the recommendations from the Apply page.

## Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

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

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

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

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

## Getting an Online Fee Estimate

Agency staff and registered public users can get fee estimates outside of the application process.

### Estimating Fees Using A Simplified Intake Form

There are three ways to access the simplified intake form for estimating fees:

- Agency staff and registered public users can select the Start an Application action from the **I Want To** quick actions drop-down.

On the Apply page, all applications that have fees associated with them displays an **Estimate Fees** icon next to them. You can also search for specific applications. Click the **Estimate Fees** icon to open a simplified intake form.

- Agency staff and registered public users can select the Estimate Fees action from the **I Want To** quick actions drop-down list.

On the Estimate Fees page, only those applications are listed that have a fee associated with it. You can also search for specific applications. Click the **Estimate** button to open a simplified intake form.

- Registered public users can use the **Estimate Fees** tile on their landing page.

On the Estimate Fees page, only those applications are listed that have a fee associated with it. You can also search for specific applications. Click the **Estimate** button to open a simplified intake form.

The simplified intake form lists only the questions necessary to estimate the fees associated with the application type you chose. Fill out and click **Next** to view the fee summary. The estimated fees are calculated and displayed for your review with fee line descriptions and amounts. You'll also see whether a fee is due when you submit the application or payable later when required. The fee estimate may include any tax amounts for the application selected.

You might want to simulate new scenarios simply by entering new values, or by selecting a different type of application. Once you have a fee estimate and decide to move forward, you can begin the application process, if desired.

**Note:** The fee estimate is only for planning purposes and the actual fees might differ based on the project details on the submitted application and the city fees active at the time of application.

## Completing an Application

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

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

This example illustrates an application.

## Single Page View and Multi-Page View

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

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

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

## General Navigation Controls

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

- **Previous** and **Next** buttons enable users to move through the steps.
- On the final step, a **Submit** button replaces the **Next** button.

Submitting an application initiates the workflow for the application. Registered public users can't make changes to submitted applications.

**Note:** After submitting a business license application, you can't make changes to the business information. Once the license is approved, you follow the amendment process for any changes. See [Applying for a Business License Amendment](#).

- The **Save** button lets users save their progress without submitting the application.

You'll see warnings when you save an incomplete application, but you can still save the application and complete it later.

- The **Close Application** button closes the application and discards unsaved changes.

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

## Data Entry Pages

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

The application begins with data entry steps that the agency configures. There can be one or many data entry steps. Agencies configure the sections and fields for each data entry step. For more information, see *Intake Form Designer Topics*. See *Using Predefined Field Groups* for more information about the sections that might be used in an application form.

Data entry sections are generally self-explanatory, but the following information includes notes about certain common sections.

**Note:** Conditions applied by agency staff to an address, parcel, contractor, or person added to the application may prevent you from submitting any new permit or planning application that contains the object. Agency staff must resolve conditions before you can proceed.

## Applicant

All applications include this section, which is used to identify the applicant.

When a registered public user starts an application, this section is prepopulated, and certain identifying fields are read-only. Updates made to the address, phone, or email when applying can be saved to the user's account profile.

Agency staff members who complete an application on behalf of a member of the public must identify the applicant by selecting an active profile for an existing registered user or by registering a new user.

When registering a new user, the staff member can continue with the application after entering and submitting the required registration information. A confirmation email is sent to the account email address so the user can complete the registration process by clicking the provided link and setting an account password. The registration is valid even if the agent abandons the application.

Registered users and agency staff with appropriate permissions can update the applicant's address, phone, or email in subsequent applications and optionally save the changes to the user's account profile. System administrators can also update account information.

See *The Public User Registration Process*.

## Application

The Application section includes the record ID and a field where applicants can enter a description. Agency staff also provide the date the application was received while entering data into the system. The received date field isn't available for applicants applying online.

## Terms and Conditions

If a data entry step includes the Terms and Conditions section, public users must agree to the terms before continuing past that step.

Agency staff can't accept terms on behalf of a public user, so this section is hidden from agency staff. Instead, users are prompted to accept the terms when they first sign in.



## Contacts

### All applications:

- The Contacts section lists people who are contacts for this specific application. These people can be, but aren't required to be, the applicant's profile contacts. The contacts may include the contractor's contact person, if available.
- Select an existing contact from a list, or enter information for a new contact on the Contact Details page.
- All application contacts must have a contact type that describes the role of the person relative to the specific application.

### Permits and planning applications:

- On the Contact Details page for new contacts, use the **Add to Profile** switch to replicate the new contact to the applicant's list of profile contacts.
- On the Contact Details page for already-added contacts, use the **Update Profile** switch to replicate any changes (such as an updated email or phone number) to the profile contact. This switch appears only if the contact is already a profile contact.
- Contact information for the contractor entered in the Contractor section in the application appears in both the Contractor and Contacts sections.
- If configured by your agency, the system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission.

### Permit and planning application access:

- If the contact type is configured to allow permit or planning application access, and the contact email matches the account email for a registered user, then that registered user can access the permit or planning application.
- When prompting for a contact type, the user can see which types allow permit or planning application access.
- The list of contacts for the application includes columns that display the contact type and whether permit or planning application access is enabled for that type.
- The page where you enter or edit contact details includes explanatory text to ensure that users are aware when the selected contact type confers permit or planning application access.
- For more details about a contact's access to a permit or planning application, see [Setting Up Contact Types](#).

## Contractor

Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are required to select a contractor license. Applicants can search by license number, business, or owner to retrieve information about the license from the agency's main contractor records, if the information already exists there. If the agency integrates with an external licensing body, the information can be retrieved from the licensing body's records.

When applicants add the contractor license from the agency's contractor records, they select a contact person from a list of verified contractors associated with the license. Once the applicant selects **Done** for the license information, the selected contact person also appears in the **Contacts** section of the application.

Applicants who are not contractors or authorized agents, such as homeowners, can optionally add contractors to their applications. The same is true for agency staff who are applying on behalf of this type of applicant. Only system administrators can modify contractor information in an application.

For more information, see [Contractor License Overview](#).

## Review

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

## Confirmation

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

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

## Making Payments

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

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

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

For information about fees payment from the registered public user's Applications page or from the agency staff's Transactions page, see *Managing Transactions*.

For information about fees payment from the application's Fees and Payments page, see *Working with Fees and Payments*.

## Viewing Fees from the Registered User Landing Page

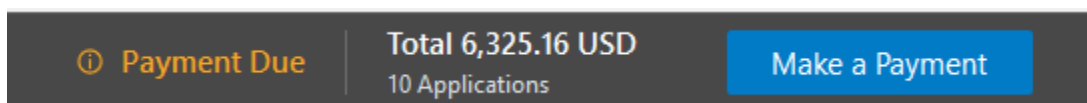
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

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



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

This example illustrates the Make a Payment banner.



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

## Paying Fees on the Make a Payment Page

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

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


This example illustrates the Make a Payment page.

The screenshot shows the 'Make a Payment' interface. At the top, there's a navigation bar with the City of Innovation logo and user profile 'BW'. Below the title 'Make a Payment', a summary bar indicates 'Total Selected | 3 Applications | 743.65 USD'. A blue 'Make a Payment' button is on the right. A search and filter bar is present above the application table.

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

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

| Page Element                   | Description   |
|--------------------------------|---|
| <b>Select All/Deselect All</b> | Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied.<br><br>The <b>Total Selected</b> field above the grid shows the number of applications selected and the total amount due for the selected applications.   |
| <b>Application</b>             | Each item on the page is identified by the application number. Click the application number to open the overview page with the application summary and access to details.<br><br>The type of application, such as <i>Residential Addition</i> , appears under the application number.<br><br>If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see <a href="#">Applying Conditions to Applications</a> . |
| <b>Property</b>                | View the location of the property for the application.  |
| <b>Description</b>             | View a description of the application.  |

| Page Element  | Description   |
|---|---|
| <b>Amount</b>   | View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.                                    |
|  | The Balance Changed alert indicates the fees for the application have been adjusted. Adjusted fees are updated automatically before checkout processing.                |
| <b>Make a Payment</b>   | Click to continue to the checkout page after selecting fees for payment.<br><br>For information about the checkout process, see <a href="#">Payment Flow Overview</a> . |

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

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

# 3 Using the Agency Springboard and Worklists

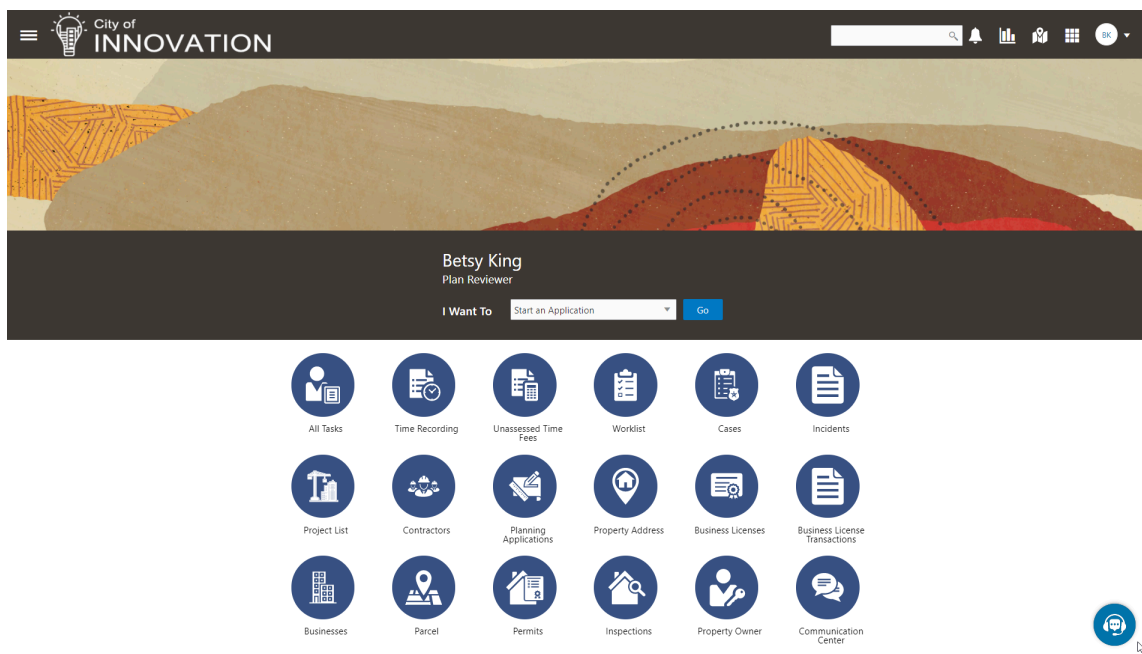
## Using the Agency Springboard

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

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

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

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









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



## Global Header

The global header appears:

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

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

| Page Element  | Description   |
|---|---|
|    | <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><br/>Public users also have access to the global search, but their search results do not include code enforcement objects (citations, incidents and cases).</p> |
|  | <p>Click the <b>Notifications</b> icon to open a pop-up window that lists the most recent unread notifications. Each notification row includes an action menu for marking the notification as read and a details button for opening the Notification Details page. The pop-up window also has a <b>View All</b> button that opens the Notifications list page, where you can access all of your notifications.</p> <p>A badge on the icon indicates the number of unread notifications. If there are more than 99 unread notifications, the badge displays 99+.</p>   |
|  | <p>Click the <b>Reports and Analytics</b> icon to access the Oracle Business Intelligence Catalog (BI Catalog) or access predefined dashboards.</p>   |
|  | <p>Click the <b>Maps</b> icon to access these maps:</p> <ul style="list-style-type: none"> <li>• The main agency map lets you view existing transactions or start new applications for properties that you select.</li> <li>• The Public Hearing map lets you generate hearing notifications by defining an area and generating lists of parcels, owners, and addresses for that area.</li> </ul> <p>If you only have security access to one map, clicking the Maps icon opens that map. If you have access to both maps, clicking the Maps icon opens a menu so you can choose which map to open.</p>  |

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

## Alerts

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

## Quick Actions (I Want To)

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

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

| Action                        | Description   |
|-------------------------------|---|
| <i>Start an Application</i>   | Opens the Apply page, where you can chose an application type and start an application. See <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.

## Using the Planner Worklist

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

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

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

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

The planner worklist has the following tabs:

| Tab                     | Displays   | Available Actions  | Additional Information  |
|-------------------------|--|--|---|
| Unassigned Applications | <p>Submitted and In Process planning applications that do not have an assigned planner.</p> <p>This tab includes a map view for displaying application locations.</p>  | Assign   | <p>This tab is visible only to users who have assigning privileges.</p> <p>Assigning an application removes it from this tab.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <a href="#">Applying Conditions to Applications</a></p> |
| My Applications         | <p>Submitted and In Process planning applications that are assigned to the current user.</p> <p>Comments and attachments pertaining to this application.</p> <p>This tab includes a map view for displaying application locations.</p> | <ul style="list-style-type: none"> <li>Send Message<br/>See <a href="#">Working with Communications</a>.</li> <li>Reassign<br/>See <a href="#">Working with Planners</a>.</li> <li>Copy Application<br/>See <a href="#">Copying an Application</a>.</li> <li>Withdraw<br/>See <a href="#">Withdrawing an Application</a>.</li> </ul> | <p>This tab is visible only to users who have the <i>Planner</i> Job Function (ORA_PLANNER) and the attribute <i>Planning Application Types</i> (ORA_PLANNING_APPLICATION_TYPES).</p> <p>Review or add your own comments and attachments.</p> <p>See <a href="#">Working with Attachments</a> and <a href="#">Working with Comments</a>.</p> <p>Reassigning an application to a different user removes it from this tab.</p>  |



| Tab                 | Displays   | Available Actions  | Additional Information  |
|---------------------|--|--|---|
|                     |  | <ul style="list-style-type: none"> <li>Update Description</li> </ul>                   | <p>Users with access to this tab can reassign applications even if they don't have the additional security that provides access to the Unassigned Applications tab.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <a href="#">Applying Conditions to Applications</a></p> |
| Planning Activities | <p>Open activities that are associated with the current user's assigned planning applications.</p> <p>Activities are open if they are pending or in progress. Also, incomplete application review activities are open if they haven't been resubmitted.</p>  | <p>Update</p> <p>See <a href="#">Working with Planning Application Activities</a>.</p> | <p>Completing an activity removes it from this list, but does not affect the application status.</p> <p>Activities are initially sorted by due date, with the soonest due date at the top of the list.</p> <p>This tab has subtabs that further filter the activities by due date: <i>Overdue, Due Today, Due This Week, and Due Next Week</i>.</p> <p>Subtab action menus have the same actions as the main tab. To return from a subtab to the main tab, click the Back icon next to the Search icon.</p>   |
| Plan Reviews        | <p>All applications owned by the current user that have tasks pending for review.</p> <p>The Plan Reviews tab displays a set of essential details related to the plan review, including the:</p> <ul style="list-style-type: none"> <li>application ID and type</li> <li>application status</li> <li>application description</li> <li>property information</li> <li>plan review details</li> <li>assigned date and due date</li> <li>icons to the left to indicate if any fees are due or conditions have been applied.</li> </ul> | <p>No actions.</p>   | <p>This tab is visible only if the user has the following:</p> <ul style="list-style-type: none"> <li>Role: ORA_PSC_PLAN_REVIEWER_JOB</li> <li>Access to the list: PSC_ACCESS_MY_PLAN_REVIEWS_TASK_LIST_PRIV</li> </ul>   |

| Tab            | Displays  | Available Actions  | Additional Information   |
|----------------|---|--|--|
| Inspections    | All applications owned by the current user that have tasks in the Inspection status.  | No actions.  | <p>This tab is visible only if the user has the following:</p> <ul style="list-style-type: none"> <li>• Role: ORA_PSC_BUILDING_INSPECTOR_JOB</li> <li>• Access to the list: PSC_ACCESS_MY_INSPECTIONS_TASK_LIST_PRIV</li> </ul>  |
| Incoming Tasks | All active applications assigned for the group.   | <p>If the incoming task is for the group then the planner has the following actions:</p> <ul style="list-style-type: none"> <li>• Claim</li> <li>• Reassign</li> </ul> <p>If the task is already assigned to the planner, then the planner has the following actions:</p> <ul style="list-style-type: none"> <li>• Update</li> <li>• Release</li> <li>• Reassign</li> </ul> <p>If you update the task by assigning or reassigning to a planner, the workflow task – <b>Assign Planner</b> will be updated to <i>Planner Assigned</i> status using the Business Rules Framework configuration. For more details, see <i>Using Workflow</i>.</p> |  |
| Calendar       | <p>Shows the meeting schedules for the agency on a calendar or on a list.</p> <p>Planner meetings show the schedules for pre-application, planning application, and public hearing.</p> | <ul style="list-style-type: none"> <li>• View meetings assigned to the planner logged in.</li> <li>• View all meeting schedules.</li> </ul>  | <p>Calendar View shows the meetings scheduled for the month. You can choose to view the calendar by month, week, or day.</p> <p>List view shows the list of pre-application and planning application meetings in the Meetings tab and the list of public hearing meetings in the Hearings tab.</p> <p>See the section <i>Viewing Meetings on the Calendar</i> in <i>Working with Meetings</i>.</p> |

## Viewing Additional Application Information

Both the Task Management page and the worklists display icons in the left column to indicate additional information an agency user might need to view immediately regarding a transaction. For example, the icons can indicate whether conditions have been applied, if additional fees are required, and so on. Click the icon to view details.

If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the application's Conditions details page in a new window.

*Related Topics*

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

## Managing Tasks

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

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

- The permit lifecycle
- Inspections
- Plan reviews
- The planning application lifecycle

## Security Details for Managing Tasks

This section describes important security roles, requirements, or considerations specific to managing tasks.

| Primary Role                        | Access Description                   | Associated Job Roles and Abstract Roles   |
|-------------------------------------|--------------------------------------|---|
| PSC Access Task Management Worklist | Access the task management worklist. | PSC Inspections Supervisor<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Business Analyst<br>PSC Building Inspector<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor |

| Primary Role | Access Description | Associated Job Roles and Abstract Roles           |
|--------------|--------------------|---|
|              |                    | PSC System Administrator<br>PSC Permit Technician |

| Primary Role                        | Access Description                   | Associated Job Roles and Abstract Roles   |
|-------------------------------------|--------------------------------------|---|
| PSC Access Task Management Worklist | Access the task management worklist. | PSC Inspections Supervisor<br>PSC Building Inspector<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit 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](#).

## Reviewing and Managing Tasks

The Task Management page enables agency users to view a list of all task types assigned to them.

1. On the agency springboard, select the **All Tasks** tile.
2. Use the search, filter, and sort options to refine the list of tasks as needed.
3. Use these fields to review task information:

| Page Element           | Description  |
|------------------------|--|
| <b>Fees/Conditions</b> | If any fees are due or conditions are applied, icons indicating this appear in the left column of the grid.<br><br>See the section, "Viewing Additional Transaction Information" for more information. |
| <b>Task Name</b>       | Identifies the nature of the task to be performed. Values include <i>Application Acceptance</i> , <i>Permit Completion</i> , and so on.  |
| <b>Task ID</b>         | The unique identifier of the task.   |

| Page Element            | Description  |
|-------------------------|--|
|                         |  |
| <b>Application ID</b>   | The application ID for the individual submitted transaction being worked, such as the permit ID.   |
| <b>Application Type</b> | The type of application being worked, such as <i>Solar Permit</i> , <i>Building Permit</i> , and so on.  |
| <b>Status</b>           | Displays the task status. Different types of tasks can have different statuses. For example, permit tasks may have a status of <i>Assigned</i> , while inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks. |
| <b>Assigned To</b>      | Displays to whom the task is assigned.   |
| <b>Assigned Date</b>    | Displays the date on which the task was assigned.  |
| <b>Actions</b>          | Click to display the actions you can take for that task, such as <i>Claim</i> , <i>Reassign</i> , and so on.   |
| >                       | Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.                        |

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

## Viewing Additional Transaction Information

Both the Task Management page and the worklists display icons in the left column to indicate additional information an agency user might need to view immediately regarding a transaction. For example, the icons can indicate whether conditions have been applied, if additional fees are required, and so on. Click the icon to view the details.

If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the transaction's Conditions details page in a new window.

### Related Topics

- [Viewing Tasks in the Worklist](#)



# 4 Managing Applications for Planning and Zoning

## Security Details for Managing Applications for Planning and Zoning

This topic describes important security roles, requirements, or considerations specific to managing applications for Planning and Zoning.

| Primary Role   | Access Description  | Associated Job Roles and Abstract Roles  |
|--|---|--|
| PSC Planning and Zoning Management                       | Allows the users to have the planning and zoning management duty.             | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Planning Application Management with Elevated Access | Provides users elevated access to manage public sector planning applications. | PSC System Administrator<br>PSC Zoning Administrator<br>PSC System Administrator   |
| PSC Reopen Planning Application                          | Allows users to reopen completed planning applications.                       | PSC System Administrator<br>PSC Planning and Zoning Application 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](#).

## Managing Transactions

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

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

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

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

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

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

## Registered User View

The Applications page contains basic application and fees information for the logged in registered public user.

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

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

### Using the Applications Page

Applicants can apply for a new permit or planning application and also view the details of their submitted applications on their Applications list page. Contacts with application access who were added to an application by the applicant or by the agency staff can view the application detail and pay the fees. Contacts also see the applications they applied for themselves.

For information about adding and removing contact users, see [Adding Contacts to Applications](#)

**Note:** If the applicant or the agency staff removes a contact from an application, then the application is no longer listed on the contact user's Applications page.

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



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

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

## Using the Transactions Page

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

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

| Page Element            | Description   |
|-------------------------|---|
| <p><b>Sort By</b></p>   | <p>In the <b>List View</b>, you can use the <b>Sort By</b> button to arrange the permits or planning applications.</p> <p>Here are some of the sorting options:</p> <ul style="list-style-type: none"> <li>○ <i>Application</i></li> <li>○ <i>Type</i></li> <li>○ <i>Status</i></li> <li>○ <i>Creation Date</i></li> <li>○ <i>Submission Date</i></li> <li>○ <i>Description</i></li> <li>○ <i>Applicant</i></li> <li>○ <i>Created By</i></li> <li>○ <i>Submitted By</i></li> <li>○ <i>Total Fees</i></li> <li>○ <i>Total Due</i></li> <li>○ <i>Expiration Date</i></li> </ul> |
| <p><b>List View</b></p> | <p>View the inventory of permits or planning applications in a list.</p>  |
| <p><b>Grid View</b></p> | <p>In the <b>Grid View</b>, you can sort by selecting the column header. Some columns will have multiple sort fields. You can reset the sort order, by refreshing the page.</p>   |
| <p><b>Map View</b></p>  | <p>View the inventory of permits or planning applications on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See <i>Viewing Map Markers</i>.</p>  |




## Managing Application Activity

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

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




Here are some of the information you can look at:




| Page Element                  | Description  |
|-------------------------------|--|
| <b>Application</b>            | <p>View the application ID, application type, and status.</p> <p>Review the application status, for example, <i>Payment Pending</i>, <i>Submitted</i>, <i>Pending</i>, <i>Permit Issued</i>, and so on.</p>  |
| <b>Property</b>               | <p>View parcel information.</p> <p>Review the parcel information, including the street address, if available.</p> <p>The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.</p> <p>You can sort the Property column based on property details, such as street, address, and city. You can also sort the Additional Information column on the basis of dates, such as creation, submission and expiration, as well as names of applicant, created by and submitted by users.</p> |
| <b>Description</b>            | <p>View the description of the application entered on the application form or on the Overview page in the permit or planning application details.</p>  |
| <b>Additional Information</b> | <p>Review the name of the person who created or submitted the application, and the corresponding date. For example, the application was <i>Created by John Doe on 12/20/2018</i>.</p> <p>Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, <i>Applicant: John Doe</i>.</p> <p>View expiration notifications. For example, <i>Expires in 1 day</i> or <i>Expired on 10/01/2019</i>.</p>  |
| <b>Planner</b>                | <p>View the planner assigned to a planning application. This field appears only on the <b>Planning Applications</b> list.</p>  |
| <b>Fees</b>                   | <p>Review the total fees that are applicable to the permit or planning application and a fee balance if the total has not been paid.</p>   |

| Page Element   | Description   |
|--|---|
|   | <p>Select the <b>Pay</b> button in the <b>Actions</b> column to submit a payment on behalf of the applicant.</p> <p>The <b>Pay</b> button takes agency staff to the Pay Fees page where you can initiate a full or partial payment for the application fees. The <b>Pay</b> button on the Applications page takes applicants and contacts with application access directly to the Checkout page. Only agency staff can initiate partial payments.</p> <p>If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p>For more information about paying fees, see the <a href="#">Payment Flow Overview</a>.</p> |
|   | <p>Select the <b>Resubmit</b> button to resubmit an application.</p> <p>The application status is <i>Pending Submit</i> because there may be a problem initiating workflow. Click the <b>Resubmit</b> button to retry initiating workflow.</p> <p>Resubmitting the application does not affect the fee calculations.</p>  |
|  | <p>Select the <b>Actions</b> button for options:</p> <ul style="list-style-type: none"> <li>○ <i>Copy Application</i>: Click to copy the details of the selected application to a new application.</li> <li>○ <i>Cancel Application</i>: Click to cancel an application with a pending or payment pending status. The button appears only when the application has a pending status.</li> </ul> <p><b>Note:</b><br/>This option is available only for applicants and agency staff.</p>  |

## Identifying Transactions Page Icons

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

| Icon  | Description  |
|---|--|
|  | Indicates that there was an error during the submittal process and the application status is pending submittal. There may be a problem initiating workflow. Click the <b>Resubmit</b> button to retry initiating workflow. |
|  | Indicates that the permit or planning application is part of one or more projects. For more information, see <a href="#">Viewing Project Summaries</a> .   |
|  | Indicates the planning application is classified as a pre-application.   |

| Icon  | Description  |
|---|--|
| <br>(Hold)   | Indicates that a condition has been placed on the application.   |
| <br>(Lock)   | If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the application's Conditions details page in a new window. |
| <br>(Notice) | A <b>Lock</b> condition enforces all rules to restrict permit and planning application activity associated with a license. A <b>Hold</b> condition indicates that one or more rules apply. And the <b>Notice</b> condition shows there's an issue but no restrictions.   |
|   | The agency sets up conditions. For more information about conditions, see <a href="#">Applying Conditions to Applications</a> .  |

## Starting an Application

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

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

Click **Apply** on the Transactions page.

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

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

## Updating an Application

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

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

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

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

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

## Canceling a Pending Application

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

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

## Entering Application Fee Payments

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

**Note:** Contacts can initiate payments only for individual applications, using the **Pay** button for the application on the Applications page or on the application's Fees and Payments page.

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

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

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

## Copying an Application

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

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

## Accessing Application Details

You can access application details from the Transactions page.

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

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

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

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

## Copying an Application

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

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

To copy an application:

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

| Page Element                        | Description  |
|-------------------------------------|--|
| <b>Copy From</b>                    | Displays the application ID and the application type for the source application.   |
| <b>Copy To Applicant</b>            | Use the <b>Edit</b> button to open the Select Applicant modal window. From the modal window, use the search field to select the applicant and click the <b>Add Applicant</b> button.<br><br><b>Note:</b><br>Registered public users cannot edit The Copy To Applicant option. For them, the applicant name is automatically copied over from the source application. |
| <b>Application Type</b> (enterable) | Select the application type for the new application. The application type from the source application is the default value.  |
| <b>Description</b>                  | Review and optionally modify the description of the source application to create the description for the new application.  |

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

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

| Page Element               | Description  |
|----------------------------|--|
| <b>Application Details</b> | Select this check box to copy application data from predefined field groups other than the ones that are controlled by separate check boxes (that is, field groups other than property, contacts, contractor, and authorized agents).<br><br>If the new application type is different from the source application type, copying only occurs for sections that exist in both the application types. |
| <b>Contacts</b>            | Select this check box to copy contacts from the source application.  |

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

7. Click **Copy Application**. The new application intake form opens.

You can view this form in either a *Single-Page View* or *Multi-Page View* of the sections. In the new application intake form, you can see the information copied from the source application. You can also add further details to the new application. The intake form contains a **Fee Summary** section which displays the types of fees and the total fees associated with the new application. From the **Review** page, you can take a final look at the application before submitting. You can use the **Edit** button in each section to enter any missing information and submit the form.

## Canceling an Application

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



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



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

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

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

|   |                 |                          |   |
|---|-----------------|--------------------------|---|
| Created by Joe Green on 12/5/19<br>Applicant: William Brown   | Fees<br>Balance | 158.13 USD<br>158.13 USD |   |
| Created by Lola Nguyen on 12/5/19<br>Applicant: William Brown | No fees         |                          | <div style="border: 1px solid gray; padding: 2px;"> <p>Copy Application</p> <p style="border: 2px solid red; padding: 2px;">Cancel Application</p> </div>               |

## Security Details for Canceling an Application

This section describes important security roles, requirements, or considerations specific to canceling an application.

| Primary Role                  | Access Description  | Associated Job Roles and Abstract Roles  |
|-------------------------------|---|--|
| PSC Cancel Permit Application | Allows an agency user to cancel a pending permit application. | <ul style="list-style-type: none"> <li>PSC System Administrator</li> <li>PSC Registered Public User</li> <li>PSC Principal Planner</li> <li>PSC Permits Supervisor</li> <li>PSC System Administrator</li> <li>PSC Permit Technician</li> </ul> |

| Primary Role                    | Access Description  | Associated Job Roles and Abstract Roles  |
|---------------------------------|---|--|
| PSC Cancel Planning Application | Allows an agency user to cancel a pending planning application. | <ul style="list-style-type: none"> <li>PSC System Administrator</li> <li>PSC Zoning Administrator</li> <li>PSC Planning Assistant</li> <li>PSC Associate Planner</li> <li>PSC Registered Public User</li> <li>PSC Principal Planner</li> </ul> |

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*.

## Canceling Pending Applications

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

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

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

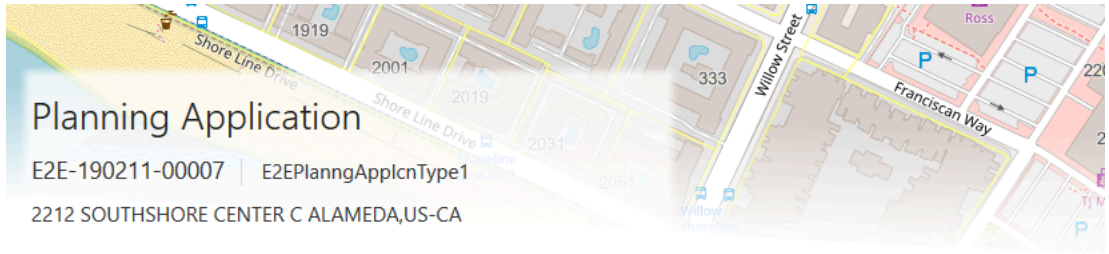
**Note:** When you cancel an application, the system also cancels any plan reviews that are associated with the application.

## Navigating to Planning Application Details

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

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

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



<<

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

## E2EPlanngApplcnType1 Permit

▲ Site and Zoning

- Planning Case Required
- Required Planning Case Type
- Total Acreage
- Disturbed Acreage
- Base Flood Elevation
- In Flood Zone
- Flood Zone

To access the planning application detail pages:

1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application.
3. Navigate to planning application information using the links in the left panel.

The information for a planning application comprises these pages:

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

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

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

## Viewing the Planning Application Detail Overview

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

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

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

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

### Using the Overview Page

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the selected application to open the Overview page.

**Note:** A condition icon is displayed on the row if a planning application has a condition applied to it. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.

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

| Page Element | Description                    |
|--------------|--------------------------------|
| Status       | Review the application status. |

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

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

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

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

## Withdrawing an Application

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

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

You can withdraw permit applications with one of these statuses:

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

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

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

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

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

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

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

## Security Details for Withdrawing an Application

This section describes important security roles, requirements, or considerations specific to withdrawing an application.

| Primary Role                    | Access Description   | Associated Job Roles and Abstract Roles  |
|---------------------------------|--|--|
| PSC Withdraw Permit Application | Allows an agency user to withdraw a permit application after submission. | PSC System Administrator<br>PSC Principal Planner<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit Technician |



| Primary Role | Access Description | Associated Job Roles and Abstract Roles |
|--------------|--------------------|---|
|              |                    |   |

| Primary Role                      | Access Description   | Associated Job Roles and Abstract Roles  |
|-----------------------------------|--|--|
| PSC Withdraw Planning Application | Allows an agency user to withdraw a planning application after submission. | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>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](#).

## Withdrawing In-Progress Applications

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

To withdraw an application:

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

## Reopening a Permit or Planning Application

Agency administrators can reopen permits or planning applications to add a new inspection, plan review or perform other actions based on the transaction status.

Agency administrators with the appropriate access can reopen applications from the Transactions page or the overview page using the Reopen Permit or Reopen Application option. You can reopen permits which are in either expired, completed or closed status. You can reopen the planning applications in the completed status. Once reopened, the agency administrator can edit or update the permit or planning application to add a new inspection, plan review or perform other actions based on the transaction status.

To reopen a permit or planning application:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, find the permit, planning application, or pre-application that you want to reopen.
3. Click the Actions icon in the row of the application you want to reopen.

4. Click the **Reopen Permit** or **Reopen Application** action.
5. On the Reopen Application page, use the following fields to update the permit or application information:

| Page Element              | Description   |
|---------------------------|---|
| Select workflow task      | Select the workflow task to be updated.   |
| Update transaction status | By default, this field displays the status in which the permit or application was before it was reopened. From the drop-down menu, select the status to which you want to update the permit or application. |
| Update Expiration date    | Enter a new date to provide an updated expiration date.<br><br><b>Note:</b><br>Only permits which had an expiration date associated with it before it was reopened, will display this field.                |
| Reopen Reason             | Enter a reason for reopening the permit or planning application.  |

6. Click **Reopen**. You can now open the permit or planning application from the Transactions page.

**Note:** Permits and planning applications can have conditions applied to them. Once reopened, the permits and planning applications will not have any previously applied conditions associated with them. After reopening, if you want, you must manually apply the conditions to the permits and planning applications.

*Related Topics*

- [Applying Conditions to Applications](#)

## Working with Planners

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

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

## Assign Planner

PreApp-2019-00008

PreAppMeeting

The assigned planner is Susan Anderson.

| Planner List                                       |                    | History |
|--|--------------------|---------|
| Name   | Job Title          |         |
| <input type="checkbox"/> Andy Jones                | Plan Coordinator   |         |
| <input type="checkbox"/> Angela Williams           | Permit Technician  |         |
| <input type="checkbox"/> Black Swan                | Planning Assistant |         |
| <input checked="" type="checkbox"/> Susan Anderson | Principal Planner  |         |

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

## Security Details for Working with Planners

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

| Primary Role       | Access Description  | Associated Job Roles and Abstract Roles  |
|--------------------|---|--|
| PSC Assign Planner | Assign a planner to planning application and pre-application. | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |

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](#).

## Assigning a Planner


1. Select **Planning Applications** on the Agency Springboard.
2. Click the row for a planning application on the Transactions page.
3. On the Overview page, click the **Assign** link in the **Planner** field.  
If a planner has already been assigned, you can click the **Reassign** link to select a different planner.
4. Select the check box for the planner to assign them to the planning application.
5. Click **Save** to save your selection.

When you update the task by assigning or reassigning to a planner, the workflow task can optionally be updated to an assigned status using the Business Rules Framework configuration. The business rules you set up for the *Planner Assigned* and *Planner Reassigned* events use the *Update Workflow* action. For more information, see [Setting Up Update Workflow Actions](#). See also [Using Workflow](#).

## Viewing Planner Assignment History

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

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

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

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

### Related Topics

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

## Working with Property Information

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

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

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

## Security Details for Working with Property Information

This section describes important security roles, requirements, or considerations specific to working with property information in Permits and Planning and Zoning.

| Primary Role                                | Access Description                                 | Associated Job Roles and Abstract Roles   |
|---|--|---|
| Anonymous access                            | View property information on permits.              | All users including users without login   |
| PSC Permit Property Management              | Manage property information until it isn't closed. | PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit Technician |
| PSC Permits Management with Elevated Access | Manage property information at all times.          | PSC Permits Supervisor<br>PSC System Administrator  |

| Primary Role   | Access Description                                  | Associated Job Roles and Abstract Roles                                  |
|--|---|--|
| Anonymous access   | View property information on planning applications. | All users including users without login                                  |
| PSC Planning and Zoning Property Management              | Manage property information until it isn't closed.  | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Planning Application Management with Elevated Access | Manage property information at all times.           | PSC Zoning Administrator<br>PSC System Administrator                     |

For more information on creating roles for Public Sector Permitting and Licensing, 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 Property Information

The Property Information page displays a list of properties associated with the application as well as GIS attributes and values from map layers collected during the application process.

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click **Property Information** in the left panel.
4. Search for an existing property using the **Search Property** field. You can click the **Select from List** link to search for and select a property from the Search Property page.

The **Contains** and **Starts with** options allow you to refine your search results further using one of the check box options.

You can also use the Map icon to view a map and select the location.


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

5. Click a row to view detailed parcel, address, and owner information for the property on the Property Information modal page.
6. View the **Additional Property Reference** grid that contains GIS information for each property associated with the application.

The GIS attributes are retrieved from map layer content and saved in this grid in the application details after you select a property on the application. For each additional property that you select, the respective GIS attributes and values intersecting that property are also collected. The captured attributes may only be visible to agency staff, depending on the application design.

**Note:** The agency sets up the map services, map layers, and object attributes for collecting GIS information on the Map Layer Content tab of the GIS Attribute Mapping page. For more information, see [Setting Up GIS Attribute Mapping](#). For information about selecting the attributes to collect on an application form, see "Working with Property Field Groups" in [Using Predefined Field Groups](#).

| Page Element       | Description  |
|--------------------|--|
| <b>Map Service</b> | Displays the name of the map service used to collect the GIS attributes and values from the map layers.                                      |
| <b>Layer</b>       | Displays the name of the layer that contains the attribute. For example, <i>Flood Zone</i> or <i>Fire District</i> .                         |
| <b>Attribute</b>   | Displays the name of the GIS object attribute in the map layer. For example, <i>Risk Level</i> .   |
| <b>Value</b>       | Displays the value of the attribute from the map layer. For example, the value for the <i>Risk Level</i> attribute label can be <i>Low</i> . |

| Page Element  | Description   |
|---|---|
|   | <p><b>Note:</b><br/>Agency staff can manually update the <b>Value</b> field. Click <b>Edit</b> for the GIS information row.</p>   |
| <b>Location Type</b>  | Displays whether this property is a parcel, address, or object.   |
| <b>Location Reference</b>   | Displays the reference number for the property.   |
|  | <p>Click the button to recover the GIS attributes and their values from the map service.</p> <p><b>CAUTION:</b><br/>Clicking <b>Refresh</b> overwrites any manually updated values with the map service values.</p> |

## Adding New Properties

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

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

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

## Adding Existing Properties

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

5. To add multiple properties:
  - a. Click **Select from List** to access the Search Property modal page.
  - b. Search for the properties that you want to add and select the check box next to them.  
You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.  
You can view all of the selected properties in the Selections tab.
  - c. Click **Done**. All of the properties that you selected appear in the grid on the Property Information page.

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

## Adding Properties and Other GIS Objects from the Map View

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

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

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

## Modifying Property Details

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

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

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

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

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

## Deleting a Property

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



- 4. On the Property Information page, click the **Delete** icon next to the property that you want to remove from the application.

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

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

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

### Related Topics

- [Setting Up Agencies](#)

## Viewing Application Information

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

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

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

Planning Application  
AUP-2019-00002 Administrative Use Permit  
2160 OTIS DR ALAMEDAUS-CA  
● HOLD\_2019021271030054 All Conditions: 1

Administrative Use Permit

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

Site Data [Edit]

Site Use [Edit]

Existing Setbacks [Edit]

Proposed Setbacks [Edit]

- Proposed Front
- Proposed Sides
- Proposed Rear

Parking [Edit]

- Required Parking Spaces
- Proposed Parking Spaces

Submittal Requirements [Edit]

**Describe all applicable requests for this project, such as variances, flex or reserve units, zoning changes, special exceptions, or incentives. If applicable, provide justification for each. Use additional sheets if necessary.**

Provide one complete 11'X17' set, including the following documents and drawings: Conceptual Overview (including site and project description), Survey, Preliminary Site Plan, and Elevations, to the Planning Division two business days prior to the conference. An additional 10 sets (11'X17') shall be provided at the time of the Conference

Description

## Updating Application Details

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

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

## Using Workflow

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<br>PSC Permits Supervisor<br>PSC System Administrator  |
| PSC Permits Workflow User          | Participate in permit workflow, add, update comments and attachments on workflow | PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer |

| Primary Role   | Access Description                                       | Associated Job Roles and Abstract Roles  |
|--|--|--|
|  |  | PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permit Technician  |
| 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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permit Technician |

| Primary Role  | Access Description  | Associated Job Roles and Abstract Roles  |
|---|---|--|
| PSC View Permit Workflow Attachments                                      | View permit workflow attachments                                      | PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator   |

| Primary Role  | Access Description   | Associated Job Roles and Abstract Roles                              |
|---|--|--|
|   |  | PSC Plan Reviewer<br>PSC Permits Supervisor<br>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                                  |
| 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<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>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<br>PSC Code Enforcement Supervisor<br>PSC Code Enforcement Officer |

| Primary Role | Access Description | Associated Job Roles and Abstract Roles |
|--------------|--------------------|---|
|              |                    | 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

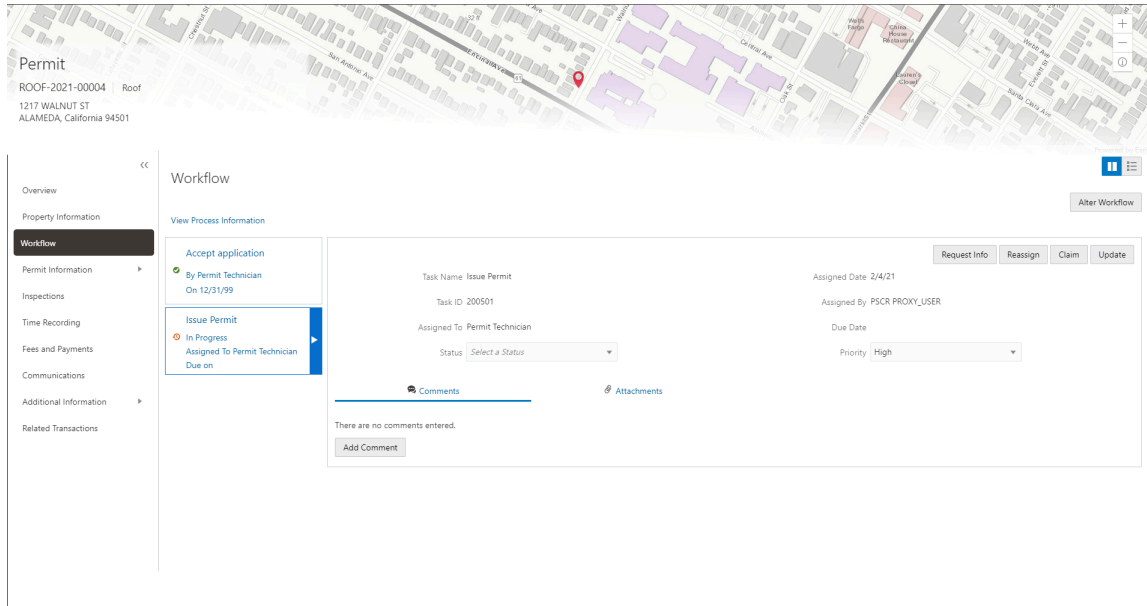
To manage workflow tasks in a two-panel view:

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.<br><br>See <i>Managing Tasks</i> .  |
| <b>Claim</b>    | Click to assign the task to yourself.<br><br>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.<br><br>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   |
|------------------------|---|
| <p><b>Status</b></p>   | <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><br/>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> |
| <p><b>Priority</b></p> | <p>Set the priority to <i>High</i>, <i>Medium</i>, or <i>Low</i>. The priority is informational only.</p>   |

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

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

- o Sends an update to the workflow engine in 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.
- o 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.

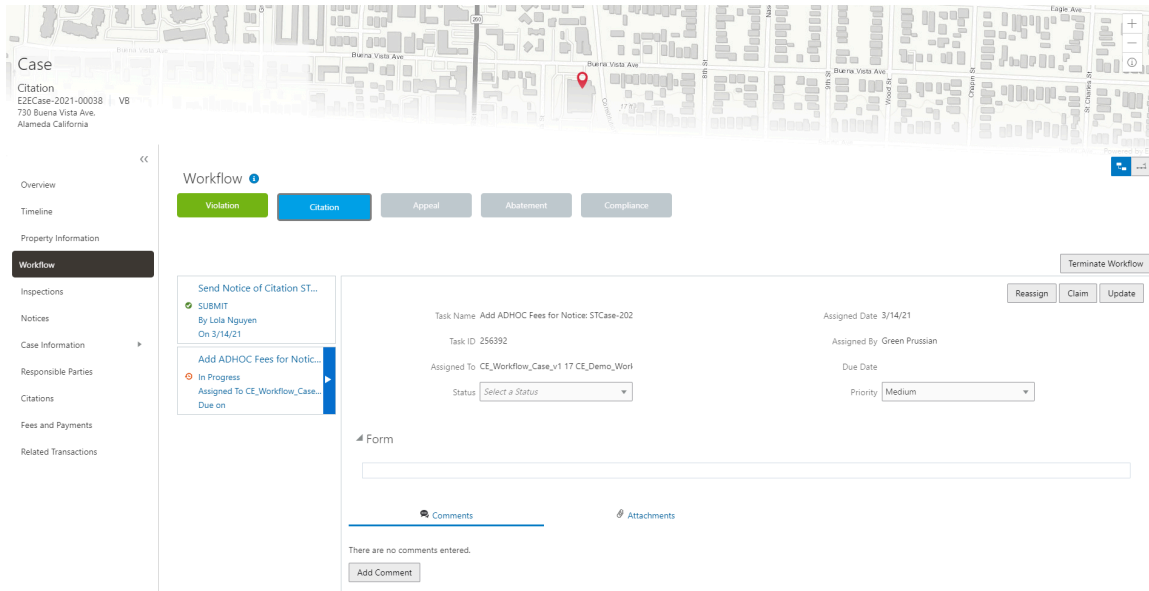
In the milestone view, the agency staff can see a time line of tasks and dates on which they were completed for the selected incident or case at the top of the page. Details are displayed in the task panels below. By default, the Code Enforcement – Incident and Case Workflow pages display a stage view.

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><br/>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>  |

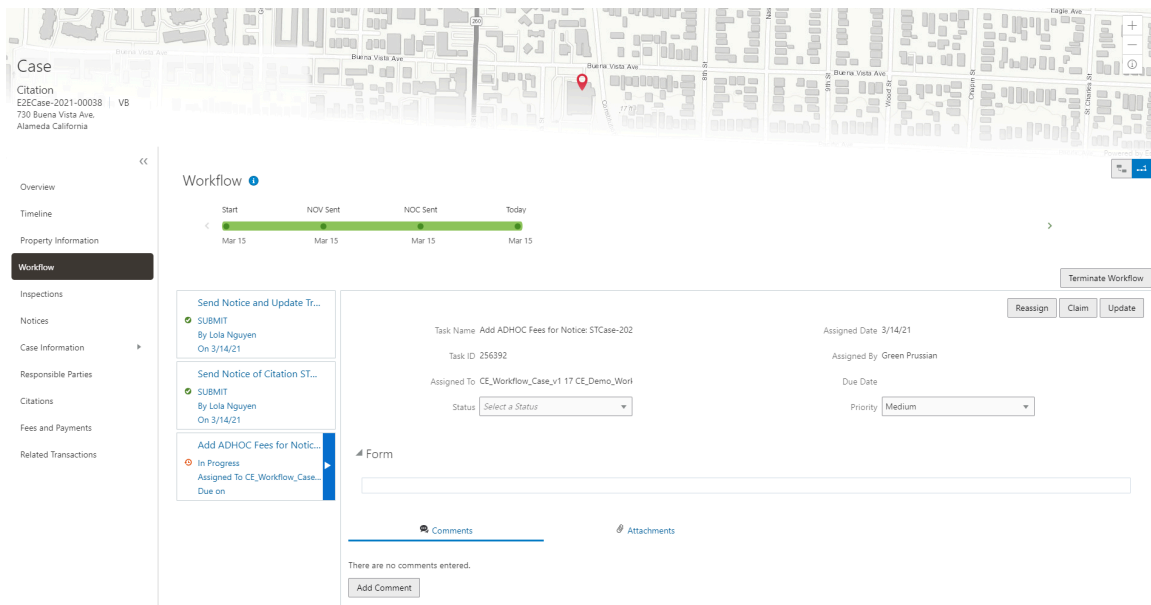
To access the Incident or Case Workflow page in the two-panel, milestone view:

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><br/>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.

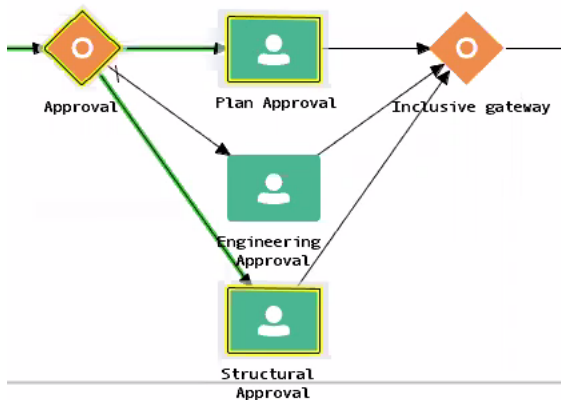
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- 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

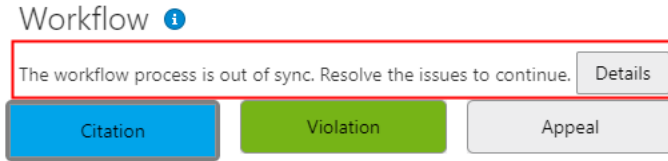
In Progress

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 Reports

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

To access the report:

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

## Security Details for Working with Reports

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

| Primary Role                         | Access Description  | Associated Job Roles and Abstract Roles              |
|--------------------------------------|---|--|
| PSC Planning Reports Management All  | Manage reports on planning applications assigned to anyone.     | PSC System Administrator<br>PSC Zoning Administrator |
| PSC Planning Reports Management Self | Manage reports on planning applications assigned to themselves. | PSC Associate Planner<br>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*.

## Viewing Reports

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

| Page Element              | Description   |
|---------------------------|---|
| <b>Report Name</b>        | View the name of the report.  |
| <b>Report Type</b>        | View the type of report: <ul style="list-style-type: none"> <li>• <i>Ad hoc</i></li> <li>• <i>System generated</i></li> </ul>   |
| <b>Application Status</b> | View the status of the application: <ul style="list-style-type: none"> <li>• <i>Pending</i></li> <li>• <i>Submitted</i></li> <li>• <i>Accepted</i></li> </ul>   |
| <b>Status</b>             | View the status of the report: <ul style="list-style-type: none"> <li>• <i>Pending</i>: Indicates that the report object is created.</li> <li>• <i>In Progress</i>: Indicates that details are entered in the report, and saved.</li> <li>• <i>Generated</i>: Indicates that the report is generated and printed.</li> <li>• <i>Sent</i>: Indicates that the report has been sent to the concerned party.</li> <li>• <i>Received</i>: Indicates that the report was received by the concerned party.</li> </ul> |
| <b>Attachment</b>         | Icon to indicate that a report was generated.   |
| <b>Actions</b>            | Select from the available options, which are based on the status of the application: <ul style="list-style-type: none"> <li>• <i>Generate</i>: Click to open the Generate Report page and generate the report. This option is available only for reports in the Pending status.</li> <li>• <i>Continue</i>: Click to open the Generate Report page of a previously saved report. This option is available only for reports in the In Progress status.</li> </ul>  |

## Creating an Ad Hoc Report

To manually create an ad hoc report for an application:

1. Navigate to **Agency Springboard > Planning Applications** . Select the application. Select **Reports** in the left navigation panel.
2. Click the **Add Ad Hoc Report** button.

3. On the Add Ad Hoc Report page, use the Category field to select a category of the report, which is set up by your agency in the Ad Hoc Associations section on the Notice and Report Group page. You can select a report from the generated list.  
Use the Search option to search for and select the ad hoc report type. Selecting the ad hoc report type returns you to the Reports page.
4. The new ad hoc report is now listed on the Reports page.

## Generating a Report

To generate a report:

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

## Viewing Report Details

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

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

## Working with Meetings

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

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

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

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

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

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

## Security Details for Working with Meetings

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

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles  |
|--|--|--|
| PSC Access Planner Calendar                              | Access the planner calendar.   | PSC Agency Staff – All agency users  |
| PSC Planning Application Meeting Inquiry                 | View a planning application meeting.                                   | PSC Agency Staff – All agency users  |
| PSC Planning Application Meeting Management              | Schedule and reschedule planning application meetings.                 | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Pre-Application Meeting Inquiry                      | View a pre-application meeting.  | PSC Agency Staff – All agency users  |
| PSC Pre-Application Meeting Management                   | Schedule and reschedule pre-application meetings.                      | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Review Summary Inquiry                               | View pre-application outcome.  | All users including users without login  |
| PSC Review Summary Management Self                       | Manage pre-application outcome of applications assigned to themselves. | PSC Associate Planner  |
| PSC Review Summary Management All                        | Manage pre-application outcome for all the applications.               | PSC Zoning Administrator<br>PSC Principal Planner<br>PSC System Administrator                        |
| PSC Planning Application Management with Elevated Access | Manage pre-application outcome for all the applications.               | PSC Zoning Administrator<br>PSC Principal Planner<br>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](#).

## Scheduling a Meeting

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

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

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

To schedule a meeting:

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

| Page Element           | Description   |
|------------------------|---|
| <b>Meeting Subject</b> | <p>Review the subject for the meeting.</p> <p><b>Note:</b><br/>Only specialists or planners can change the subject of the meeting.</p>  |
| <b>Meeting Agenda</b>  | <p>Review the agenda for the meeting.</p> <p><b>Note:</b><br/>Only specialists or planners can change the agenda of the meeting.</p>  |
| <b>Scheduled Date</b>  | <p>Select a date to schedule the meeting. The dates available for scheduling your meeting are based on the meeting template applied and the agency's holiday calendar.</p> <p>See <a href="#">Setting Up Planning Application Types</a> for the pre-application meeting template and <a href="#">Setting Up Business License Types</a> for the consultation meeting template.</p> <p>For more details about templates, see <a href="#">Setting Up Meetings</a>.</p> |

| Page Element                     | Description   |
|----------------------------------|---|
|                                  |   |
| <b>Scheduled Time</b>            | Select the start time of the scheduled meeting. The time values available for scheduling your meeting are based on the template applied by the administrator. |
| <b>Meeting Duration in Hours</b> | View the duration of the meeting, which is set up by the administrator in the template applied.   |
| <b>Meeting Location</b>          | View the location of the meeting. Only specialists or planners can change the location of the meeting.  |
| <b>Invitees</b>                  | View the list of additional invitees for the meeting. Agency staff can add or remove invitees.  |

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

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

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

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

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

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

## Adding Comments to a Meeting

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

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

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

## Modifying and Deleting Comments in a Meeting

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

## Viewing Meetings

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

## Viewing Meetings through Transactions Page

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

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





## Viewing Meetings on the Calendar

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

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

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

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

| Page Element  | Description  |
|---|--|
| <b>View</b>   | View the meeting schedules for consultation, pre-application, public hearing, and planning applications for: <ul style="list-style-type: none"> <li>○ My meetings (Default)</li> <li>○ All meetings</li> </ul>   |
|  | Select to view the meeting schedules on a calendar. You can choose to view the calendar by month, week, or day. This view is the default selection.  |
|  | Select to view the meeting schedules in a list format, with the current meeting displayed at the top followed by the future schedules. You use the <b>Filter</b> option to search the past and future meeting schedules. Use the <b>Sort By</b> and <b>Search</b> options to refine your search results. |

## Rescheduling a Meeting

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

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

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, planning application, or the pre-application for which you want to reschedule the meeting.
3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.

4. Navigate to the **Meetings** link to view the meetings page for the application.
5. On the record of the meeting you want to reschedule, click the **Reschedule** button.
6. On the meeting request page you can select a new available date and time for the meeting.  
**Note:** Only specialists or planners can edit the subject, agenda, and location of the meeting.
7. Click **Schedule**.

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

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

## Canceling a Meeting

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

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

## Working with Pre-application Outcome

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

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

## Adding a Required Application

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

1. Select **Planning Applications** on the Agency Springboard.
2. Select the pre-application record for which you want to add the required applications. The pre-application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Pre-application Outcome** link to access the Pre-application Outcome page, which lists all the required application types added for the submitted planning application.
5. Click the **Add** button to open the Required Application page and enter values for the following fields:

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

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

## Adding a Review Comment

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


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

## Viewing the Pre-application Outcome

To view the summary information:

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

| Page Element            | Description   |
|-------------------------|---|
| <b>Application Type</b> | View the type of application required.  |
| <b>Application</b>      | Use the available options: <ul style="list-style-type: none"> <li>○ <i>Create</i>: Click to open the Create Application page. The system automatically populates the application form with values copied from the applicant's pre-application. You can make changes and save or submit the application.</li> <li>○ <i>Link</i>: Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click <b>Save</b>. The Pre-application Outcome page now lists the application you just selected.</li> </ul> |

| Page Element    | Description  |
|-----------------|--|
|                 | <ul style="list-style-type: none"> <li>◦ <i>&lt;Application&gt;</i>: Click to open the Overview page of the linked planning application.</li> <li>◦ : Click to remove the link from the required application type.</li> </ul>   |
| <b>Status</b>   | View the status of the application type. For example, Not Started and Inspection. The Not Started status Indicates that no application has been created or linked for the identified application type.   |
| <b>Comments</b> | View the comments included by the planner regarding the application type.  |
| <b>Action</b>   | <p>Select an action you want to perform on the transaction:</p> <ul style="list-style-type: none"> <li>◦ <i>Edit Comments</i>: Click to open the Required Application page and update the comments.</li> <li>◦ <i>Delete</i>: Click to delete the required application type. you can't delete a required application type that is linked to an application.</li> </ul> <p><b>Note:</b><br/>These actions are available only to planners.</p> |

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

## Working with Conditions of Approval

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

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

### Security Details for Working with Conditions of Approval

This section describes important security roles, requirements, or considerations specific to working with conditions of approval.

| Primary Role                              | Access Description  | Associated Job Roles and Abstract Roles |
|---|---|---|
| PSC Conditions of Approval Inquiry        | View conditions of approval on planning applications.                     | PSC Agency Staff – All agency users     |
| PSC Conditions of Approval Administration | Administer conditions of approval on planning applications in any status. | PSC System Administrator                |

| Primary Role                               | Access Description   | Associated Job Roles and Abstract Roles |
|--|--|---|
| PSC Conditions of Approval Contributor     | Manage conditions of approval on planning applications on which the user is assigned as a plan reviewer.<br><br>Users can update and delete only the conditions added by themselves. | PSC Plan Reviewer                       |
| PSC Conditions of Approval Management All  | Manage conditions of approval on planning applications assigned to others and to themselves.   | PSC Principal Planner                   |
| PSC Conditions of Approval Management Self | Manage conditions of approval on planning applications assigned to themselves.   | PSC Associate Planner                   |

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](#).

## Viewing and Updating Conditions of Approval





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

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to view the conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page, which lists all the conditions applied to the submitted planning application.  
The conditions that are applied by the system are identified as *Automatic* in the **Updated By** attribute. The remaining conditions show the name of the agency staff who applied them.
5. Select a condition row to view its complete details on the Conditions of Approval detail page.
6. If you want to update the details of a condition, select the record row to open the Conditions of Approval detail page. You can change the values for status, category, subcategory, and compliance period.
7. Click **Save** to save the changes and return to the Conditions of Approval page.

## Reordering Conditions of Approval

The Conditions of Approval page lists the conditions of approval sorted by the date on which they were applied, showing the latest record at the top. To reorder the conditions:

1. Access the application for which you want to reorder the conditions of approval.
2. Click the Conditions of Approval link to access the Conditions of Approval page, which lists all the conditions applied to the submitted planning application.
3. Click the Reorder button to open the Reorder Conditions of Approval page and then select a condition record.  
You can reorder the conditions in two ways:
  - (a) Use the reordering icons:

| Page Element  | Description  |
|---|--|
|  | Click to move the selected record to the top of the list.    |
|  | Click to move up the selected record by one step.            |
|  | Click to move down the selected record by one step.          |
|  | Click to move the selected record to the bottom of the list. |

(b) Drag and drop the selected record to a new position in the list.

**Note:** You can also sort the conditions by their type, category, and subcategory using the column headers.

- Click **Save** to save and return to the Conditions of Approval page, which refreshes to show the reordered condition list.

## Adding New Conditions

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

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

| Page Element          | Description  |
|-----------------------|--|
| <b>Name</b>           | Enter a name for the new condition. You can add more information and use the Rich Text formatting options.     |
| <b>Status</b>         | Select a status: <ul style="list-style-type: none"> <li>○ <i>Applied</i></li> <li>○ <i>Resolved</i></li> </ul> |
| <b>Condition Type</b> | Displays <i>Custom</i> as this condition is added manually by an agency staff.                                 |

| Page Element             | Description  |
|--------------------------|--|
| <b>Category</b>          | Select a category of the condition.                                |
| <b>Subcategory</b>       | Select a subcategory of the condition.                             |
| <b>Compliance Period</b> | Select one or more compliance period values using the check boxes. |

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

## Applying Existing Conditions

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

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

## Resolving Conditions

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

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

## Deleting Conditions

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

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record from which you want to delete the conditions of approval. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.

5. Click the **Actions** button for the condition you want to delete and select **Delete**.
6. The condition row is removed from the Conditions of Approval page.

## Generating the Conditions of Approval Report

The conditions of approval report records the details of the planning application followed by the details of the conditions of approval. Review the description of the application, the name of the assigned planner, and the list of all the conditions applied to the application. The list follows the sequence of conditions as you see them listed in the Conditions of Approval page, grouped by the condition type.

To generate and view the conditions of approval report:

1. Select **Planning Applications** on the Agency Springboard.
2. Select the application record for which you want to generate the conditions of approval report. The application details page opens.
3. Click **Planning Application** in the left panel.
4. Click the **Conditions of Approval** link to access the Conditions of Approval page.
5. Click the **Generate Report** button. The conditions of approval report opens in a new window. You can print or save the report.

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

## Adding Comments to a Condition

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

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

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

## Modifying and Deleting Comments in a Condition

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

## Adding Attachments to a Condition

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

1. Access the condition of approval.



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

## Deleting Attachments from a Condition

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

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

## Accessing Plan Reviews for Planning Applications

Click the **Plan Reviews** link to access the plan reviews page for the planning application. For more information on plan reviews, see [Plan Review Overview](#).

# Working with Contractors and Agents in Applications

Use the Contractor page to view or update license information for contractors who are performing work for a permit or planning application. If the intake form for the application collects contractor or authorized agent information, the Contractor page initially displays the data provided during the intake process.

Agency staff and contractors or contacts with permit or planning application access working on their own applications can make updates until the transaction is closed or canceled. They can designate a contact person for a contractor license and give the contact access to the permit or planning application. They can indicate whether a contractor is currently performing work and also refresh contractor data from the agency's contractor records or integration with an external source. Other contractor information is read-only except for system administrators.

## Adding Contractors to a Transaction

The fields on the Add Contractor page for a license associated with a transaction correspond to the same-named fields on the main contractor pages. For descriptions of these fields, see [Working with Contractor Licenses](#).

To add contractors and their license information to a transaction:

1. Access the detail page for the permit or planning application you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. If the applicant is either a contractor or a contractor's authorized agent, turn on the switch to indicate yes.
4. Click **Add Contractor**.
5. On the Add Contractor search page, enter values for a contractor. You can search by **Business Name**, **Owner Name**, or **License Number**.

When you want to retrieve the contractor information by the exact license number, enter the number and select **I know the exact license number**. This option is only available when your agency integrates with a licensing body. The search looks for matches in the agency-maintained contractor list then in the licensing body's database.

6. Click **Find Contractors**.
7. On the Add Contractor results page, click **Select** to add a contractor. Only approved contractors appear in the results.  
  
If one or more conditions have been applied to the license, you can click the **View More Details** button for the condition on the Add Contractor page. Click **Cancel** on the Add Contractor page to exit if you want to find a different contractor.
8. Review the contractor details, such as business information, classifications, bonds, insurance, and so on. You can make these changes:
  - o Indicate whether the selected contractor is performing work by selecting the **In Use** check box. Contacts for contractors that are in use appear on the Contacts page in the application details.
  - o Select whether the applicant is a contractor or authorized agent in the **Applicant Role** field. This field is only available if you turned on the switch in step 3 to indicate that the applicant is a contractor or a contractor's authorized agent.
  - o Add or change the contact person for the contractor. When multiple contacts exist, you must select one. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact will have permit or planning application access depending on the **Contact Type** that you select.
9. Click **Done** to close the contractor details.
10. Click **Save** to save the contractor to the transaction.

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

A condition icon next to the license in the grid indicates that at least one condition is applied to the contractor license. The icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.

## Updating Contractor Information for a Transaction

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. If you're agency staff, turn the switch on for yes or off for no to answer **Is the applicant either a contractor or a contractor's authorized agent?**. Public users, who are usually homeowners, are not contractors or authorized agents.
4. Click **Refresh** in the **Actions** menu to retrieve any updated contact information from the agency's contractor records,
5. Select the row for the contractor's license that you want to edit.
6. On the contractor information page, you can make these changes:
  - o Indicate whether the selected contractor is currently performing work by selecting the **In Use** check box. Contacts for contractors that are in use appear on the Contacts page in the application details.
  - o Indicate whether the applicant is a contractor or authorized agent in the **Applicant Role** field. This field is only available if you turned on the switch in step 3 to indicate that the applicant is a contractor or a contractor's authorized agent.
  - o Add or change the contact person for the contractor. When multiple contacts exist, you select one. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact will have permit or planning application access depending on the **Contact Type** that you select.
7. Click **Done** to close the contractor details.
8. Click **Save** to save the contractor to the transaction.

## Removing Contractors from a Transaction

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

1. Access the detail page for the transaction you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. Click the **Actions** icon and select **Delete**.

## Working with Public Hearings

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

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

## Security Details for Working with Public Hearings

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

| Primary Role  | Access Description   | Associated Job Roles and Abstract Roles  |
|---|--|--|
| Anonymous access  | View hearings that are final.                                      | All users including users without login  |
| PSC Agency Planning and Zoning Inquiry                          | View hearings on all planning applications.                        | PSC Agency Staff - All agency users.   |
| PSC Appeal Hearings of Applications Assigned to Others and Self | Appeal hearings of applications assigned to others and themselves. | PSC System Administrator   |
| PSC Appeal Hearings of Applications Assigned to Self            | Appeal hearings of applications assigned to themselves.            | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Cancel Hearings of Applications Assigned to Others and Self | Cancel hearings of applications assigned to others and themselves. | PSC System Administrator   |
| PSC Cancel Hearings of Applications Assigned to Self            | Cancel hearings of applications assigned to themselves.            | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles  |
|--|--|--|
| PSC Hearings Management All                              | Manage hearings of applications assigned to others and themselves. | PSC System Administrator   |
| PSC Hearings Management Self                             | Manage hearings of applications assigned to themselves.            | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner     |
| PSC Planning and Zoning Hearings Custom Dates Management | Insert and remove custom dates.                                    | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Business Analyst<br>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](#).

## Viewing Public Hearing for a Planning Application

To view a public hearing:

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

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

| Page Element                | Description   |
|-----------------------------|---|
| <b>Decision Date</b>        | View the date on which the hearing is scheduled for a decision to be made. If there is no date displayed, the hearing is in the <b>Not Scheduled</b> status. You can schedule a hearing for your application using the <b>Schedule</b> option under the <b>Action</b> menu. |
| <b>Decision Making Body</b> | View the hearing or decision making body that will evaluate the application.  |

| Page Element                | Description   |
|-----------------------------|---|
| <b>Schedule Status</b>      | View the status of the schedule: <ul style="list-style-type: none"> <li>○ Not Scheduled</li> <li>○ Tentative</li> <li>○ Final</li> <li>○ Canceled</li> </ul>  |
| <b>Schedule Status</b>      | View the status of the hearing schedule: <ul style="list-style-type: none"> <li>○ Not Started</li> <li>○ Completed</li> </ul>   |
| <b>Staff Recommendation</b> | View the recommendation made by the staff.  |
| <b>Decision</b>             | View the decision made by the decision making body.   |
| <b>Action</b>               | The options under this menu is determined by several factors such as the user logged in, the schedule status, the decision status, and the decision.<br><br>For details about the <b>Action</b> menu, see the section Finalizing the Hearing. |

## Scheduling and Finalizing a Public Hearing

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

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

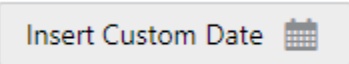

**Note:** You should first ensure that hearings are applicable to the application you have selected. On the Planning Application Type page select the value *Applicable* in the Hearing field (In the Navigator select **Planning and Zoning Setup** and then select **Planning Application Type**).
  - e. Click **Add Hearing** on the Decision and Hearing page to open the Hearing Scheduler page. The applicable decision making bodies and their schedule dates are available for scheduling the hearing.

**Note:** Once a hearing is scheduled, the Decision and Hearing page for the application is updated to show the new schedule.

## Using the Hearing Scheduler Page

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

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

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

## Finalizing the Hearing

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

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

### Performing Actions

The Actions menu on the Decision and Hearing page enables you to perform the following:

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

## Updating Decision

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

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

| Page Element                | Description   |
|-----------------------------|---|
| <b>Decision Making Body</b> | View the name of the decision making body.  |
| <b>Schedule Status</b>      | View the status of the hearing schedule: <ul style="list-style-type: none"> <li>○ Tentative</li> <li>○ Final</li> </ul> <p><b>Note:</b><br/>Once the hearing schedule is finalized, the status cannot be changed to <b>Tentative</b>.</p> |
| <b>Decision Date</b>        | View the date on which the hearing was scheduled.   |
| <b>Decision</b>             | Update the hearing decision: <ul style="list-style-type: none"> <li>○ <b>Approved</b></li> <li>○ <b>Continue</b></li> <li>○ <b>Denied</b></li> <li>○ <b>None</b></li> </ul>   |
| <b>Comments</b>             | Enter comments regarding the decision.  |

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

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

## Updating Staff Recommendation

Agency staff who are aware of a particular planning application may give their independent recommendation on the application. These staff recommendations may aid the decision making body to make their decision. Depending on the



agency, staff recommendations may or may not be a pre-requisite to the decision. Agency staff can add or update a staff recommendation once the schedule status is finalized.

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

| Page Element                     | Description   |
|----------------------------------|---|
| <b>Decision Making Body</b>      | View the name of the decision making body.  |
| <b>Schedule Status</b>           | View the status of the heading schedule.  |
| <b>Staff Recommendation</b>      | Update the staff recommendation: <ul style="list-style-type: none"> <li>○ <b>Approved</b></li> <li>○ <b>Denied</b></li> </ul>                         |
| <b>Staff Recommendation Date</b> | Click to open the calendar and select a date. You can select any date from the date on which the hearing was scheduled to add a staff recommendation. |
| <b>Comments</b>                  | Enter comments regarding the staff recommendation.  |

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

## Viewing the Details

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

| Page Element                | Description                                      |
|-----------------------------|--|
| <b>Decision Making Body</b> | View the name of the decision making body.       |
| <b>Schedule Status</b>      | View the status of the schedule.                 |
| <b>Decision Date</b>        | View the date on which the hearing is scheduled. |
| <b>Decision</b>             | View the decision status.                        |
| <b>Comments</b>             | Enter comments regarding the hearing decision.   |

| Page Element              | Description  |
|---------------------------|--|
| Appeal Status             | View the appeal status.                                  |
| Appeal Date               | View the date on which an appeal was filed.              |
| Staff Recommendation Date | View the date on which a staff recommendation was added. |
| Staff Recommendation      | View the staff recommendation added.                     |
| Comments                  | View any comments for the staff recommendation.          |

## Generating a Hearing Notifications List

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

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

To generate a hearing notification list:

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

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

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


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

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

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

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

In brief, the two selection methods are:

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

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

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

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

9. Click **Apply**.

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

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

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

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

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

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

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

The notification process is not part of the Oracle system.

## Working with Appeals

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

## Security Details for Working with Appeals

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

| Primary Role       | Access Description                                   | Associated Job Roles and Abstract Roles |
|--------------------|--|---|
| PSC Request Appeal | Allows registered public users to request an appeal. | PSC Registered Public User              |

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](#).

## Requesting an Appeal

Use the Hearings page to request an appeal:

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

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

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

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

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

| Page Element             | Description   |
|--------------------------|---|
| <b>Appeal Date</b>       | Choose any day within the appeal period to request an appeal.<br><br>The appeal period extends from the day the hearing was scheduled to the current day. |
| <b>Select Appellant</b>  | Click to search and select the appellant.   |
| <b>Appellant Type</b>    | Available values are <b>Applicant</b> and <b>Non-applicant</b> . Agency staff can override the default selection.   |
| <b>Appeal Fee (USD)</b>  | Displays the appeal fees to be paid.  |
| <b>Reason for Appeal</b> | Enter a reason for the requested appeal.  |

| Page Element | Description   |
|--------------|---|
| Attachments  | Click the <b>Add</b> icon to browse and select a document attachment. |

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

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

## Viewing an Appeal Request

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

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

## Viewing Appeal Fee Details

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

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

## Adding Contacts to Applications

The Contacts page displays the applicant’s contact information and lists additional people who were added as contacts during the intake process or after the application was submitted. Agency staff can use the Contacts page to view, update, and add contacts for submitted applications.

Applicants and contacts with application access can view and add contacts to their own permits and planning applications as well as update and make the contacts inactive. See the section "Security Details for Adding Contacts to Applications" for information about setting up security for agency staff, applicants, and application contacts to manage contacts.

There are two options for adding more contacts:

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

When a contractor license is added to a permit or planning application in the intake form or after the application was submitted, the contractor's contact person is added to the list of application contacts. Application contacts have permit or planning application access depending on the selected contact type, which is set up by your agency.

Your agency may also configure communications to contacts on permit and planning applications. The system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission. Contacts added to the contractor contacts in the license details also receive email notifications. For information about setting up these contact communications, see *Delivered Communication Events* and *Setting Up Send Communication Actions*.

## Security Details for Adding Contacts to Applications

This section describes important security roles, requirements, or considerations specific to adding contacts to applications.

| Primary Role                                | Access Description  | Associated Job Roles and Abstract Roles   |
|---|---|---|
| PSC Registered Public User                  | Add and update contacts in permit applications on which they have been assigned as an applicant or a contact with access while the application is open and currently being processed. | PSC Registered Public User  |
| PSC Permit Contacts Management              | Add and update contacts in permit application while the permit is open and currently being processed.   | PSC Principal Planner<br>PSC Plan Reviewer<br>PSC Planning Coordinator<br>PSC Permit Technician |
| PSC Permits Management with Elevated Access | Add, update, and delete contacts in permit applications at all times, whether it is open and being processed, closed, or complete.  | PSC System Administrator<br>PSC Permits Supervisor  |
| PSC System Administrator                    | Add, update, and delete contacts in permit applications at all times, whether it is open and being processed, closed, or complete.  | PSC System Administrator  |

| Primary Role           | Access Description  | Associated Job Roles and Abstract Roles |
|------------------------|---|---|
| Registered Public User | Add and update contacts in planning applications on which they have been assigned as an applicant or a contact with access while the application is open and currently being processed. | Registered Public User                  |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles                                  |
|--|--|--|
| PSC Planning and Zoning Contacts Management              | Add and update contacts in planning applications while the application is open and currently being processed.                        | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Planning Application Management with Elevated Access | Add, update, and delete contacts in planning applications at all times, whether it is open and being processed, closed, or complete. | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Planning Application Management with Elevated Access | Add, update, and delete contacts in planning applications at all times, whether it is open and being processed, closed, or complete. | PSC System Administrator<br>PSC Zoning Administrator                     |

**Note:** Before contacts can manage other contacts, your agency must add the PSC Contact User duty role (ORA\_PSC\_CONTACT\_USER\_DUTY) to the PSC Custom Registered Public User role (CUSTOM\_PSC\_REGISTERED\_PUBLIC\_USER) and enable application access for the contact type.

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*.

## Managing Application Contacts

To manage application contacts:

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

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

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

The Contact Details page has two sections:

- o The **Add from registered contacts** section lists existing contacts from the user's account profile that can be added to the application.
- o The **Add brand new contact manually** section provides a **Create** button for creating new contacts from scratch.

7. To add existing contacts to the application:

- a. Click the **Add** button.
- b. On the Contact Details page, click the row of the contact you want to select from the user's account profile in the **Add from registered contacts** grid.
- c. In the Select Contact Type modal window, enter the following information:

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

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

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

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

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

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

- d. Enter the following additional information:

| Page Element | Description  |
|--------------|--|
| <b>Type</b>  | <p>Select the role or position of the contact person relative to the current application. For example, a contact might be a property owner, a business owner, or a contractor.</p> |



| Page Element  | Description  |
|---|--|
|   | <p>When you add contacts for an application, pay close attention to whether the contact type grants the person access to the permit or planning application. You can see the <b>Permit Access</b> or <b>Planning Access</b> field when you prompt for the contact type and when you review the list of contacts on the main Contact page. This information doesn't appear in the context of non-permit or planning applications.</p> <p>If the contact type allows permit or planning application access <i>and</i> the contact email matches the account email for a registered user, then that user can access the permit or planning application. For more information, see <a href="#">Setting Up Contact Types</a>.</p> |
| <p><b>This person is Primary Contact for this application</b></p> | <p>Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.</p>  |
| <p><b>Business</b></p>  | <p>If the contact represents a business, enter the business name.</p>  |
| <p><b>Active</b></p>  | <p>Select the check box to indicate that the contact is active.</p> <p>When a contractor for a permit or planning application is no longer in use, the contact associated with the license isn't active. Also, when a system administrator deletes a contractor after application submission, the contact becomes inactive.</p>  |

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

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

- 9. To modify information about an application contact:

- a. Click the row for the contact.
- b. On the Contact Details page, update the contact type and detail information.

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

- c. Use the **Active** check box to indicate a contact is active or inactive.
- d. Select the **Add to Profile** check box to make this contact a profile contact in addition to a contact for the current application. Only applicants can add a contact to their own profile.
- e. Click **Save**.

10. To remove a contact from an application:

**Note:** Only system administrators and supervisors have permissions to delete contacts.

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

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

## Applying Conditions to Applications

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

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

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

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

## Security Details for Applying Conditions to Applications

This section describes important security roles, requirements, or considerations specific to applying conditions to applications.

| Primary Role                     | Access Description                       | Associated Job Roles and Abstract Roles   |
|----------------------------------|--|---|
| PSC Permit Conditions Management | Apply and resolve conditions on permits. | PSC Inspections Supervisor<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Business Analyst<br>PSC Building Inspector<br>PSC System Administrator<br>PSC Registered Public User |

| Primary Role | Access Description | Associated Job Roles and Abstract Roles   |
|--------------|--------------------|---|
|              |                    | PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit Technician |

| Primary Role                                  | Access Description                                     | Associated Job Roles and Abstract Roles   |
|---|--|---|
| PSC Planning and Zoning Conditions Management | Apply and resolve conditions on planning applications. | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Cashier<br>PSC Business Analyst<br>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*.

## Automatically Applying Conditions

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

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




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

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

## Applying a Condition to a Transaction

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

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

| Page Element   | Description   |
|--|---|
| <b>Condition Name</b>  | <p>Use the lookup prompt to search and select the condition that you want to apply. The search page lists all available conditions along with their severity, display message, and description.</p> <p>After you select a condition, the condition information is brought in as it was defined in the condition definition. You can override the default rules, priority, description, and additional information to customize the condition.</p> <p>For more information on conditions, see <a href="#">Setting Up Conditions</a>.</p>   |
| <b>Display Message</b>   | Displays the message associated with the selected condition. This message is entered by your agency administrator in the condition definition and can't be updated here.  |
| <b>Severity</b><br><br> Lock  Hold<br><br> Notice | <p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>  |
| <b>Condition Rules</b>   | <p>Select one or more rules from:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one</p> |

| Page Element                  | Description  |
|-------------------------------|--|
|                               | <p>condition rule, and for a condition with Lock severity, all condition rules are automatically applied.</p> <p>The condition rule <i>Prevent Application Progress</i> is only applicable to conditions on persons, parcels, property addresses, and contractor licenses.</p> <p>See <a href="#">Setting Up Conditions</a>.</p> |
| <b>Priority</b>               | Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .   |
| <b>Description</b>            | Displays the description as entered by your agency administrator in the condition definition, but you can update the text here.  |
| <b>Additional Information</b> | Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.   |

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

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

## Resolving a Condition

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

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

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

## Modifying a Condition

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

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

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

6. Click **Save**.

## Viewing a Resolved Condition

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

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

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

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

### Related Topics

- [Working with Conditions](#)

## Working with Attachments

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

Attachments provide supporting documentation needed by agency staff when processing transactions or managing records. 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.<br><br>View all attachments on applications for which the user is the applicant. | PSC Registered Public User  |
| PSC Agency Permits Inquiry   | View permit attachments.  | PSC Agency Staff – All agency users   |
| PSC Permits Attachments User | Add attachments to permits.<br><br>Update and delete attachments added by themselves.   | PSC Inspections Supervisor<br><br>PSC Geographical Information System Administrator<br><br>PSC Finance Administrator<br><br>PSC Economic Development Officer<br><br>PSC Chief Building Officer<br><br>PSC Cashier<br><br>PSC Building Inspector<br><br>PSC Apply Permit Duty<br><br>PSC System Administrator<br><br>PSC Principal Planner<br><br>PSC Planning Coordinator<br><br>PSC Plan Reviewer<br><br>PSC Permits Supervisor<br><br>PSC Permit Technician |
| PSC Add Permit Attachments   | Add permit attachments.   | PSC Inspections Supervisor  |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles   |
|--|--|---|
|  |  | PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Apply Permit Duty<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>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<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Apply Permit Duty<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permit Technician |



| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles   |
|--|--|---|
| 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<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Apply Permit Duty<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>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.<br><br>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<br>PSC Planning Attachments User Duty<br>PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner |

| Primary Role  | Access Description  | Associated Job Roles and Abstract Roles  |
|---|---|--|
|   |   | PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Cashier<br>PSC Principal Planner<br>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<br>PSC Apply Planning and Zoning Duty<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Cashier<br>PSC Principal Planner<br>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<br>PSC Apply Planning and Zoning Duty<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer  |

| Primary Role   | Access Description  | Associated Job Roles and Abstract Roles  |
|--|---|--|
|  |   | PSC Cashier<br>PSC Principal Planner<br>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<br>PSC Apply Planning and Zoning Duty<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Cashier<br>PSC Principal Planner<br>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  |
|---|--|
|  | <p>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.</p> <p>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.</p>  |
|  | <p>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.</p> <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>.</p> <p>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> |

| Page Element                    | Description   |
|---------------------------------|---|
|                                 | <p><b>Note:</b><br/>This column appears only on the All tab for permits.</p>  |
| <b>Uploaded By</b>              | View the name of the person who uploaded the file along with the date and time that the person uploaded the file.   |
| <b>Category and Subcategory</b> | <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><br/>This field is not available for case and business license attachments.</p>   |
| <b>Actions</b>                  | <p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> <li>○ <i>View Details</i></li> <li>○ <i>Download</i></li> <li>○ <i>Delete</i></li> </ul> <p><b>Note:</b><br/>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 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<br>PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit Technician |
| PSC Permit Management with Elevated Access          | Add comments to permits at all times.                     | PSC System Administrator<br>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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Apply Permit Duty<br>PSC Principal Planner   |



| Primary Role  | Access Description  | Associated Job Roles and Abstract Roles  |
|---|---|--|
|   |   | PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>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<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Apply Permit Duty<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>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.<br><br>Add, update, and delete comments till the application is closed. | PSC Registered Public User                           |
| PSC Registered Public User              | View comments on your own planning applications that are marked as visible to public.<br><br>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<br>PSC Zoning Administrator |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles  |
|--|--|--|
|  |  | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permit Technician                       |
| PSC Planning Application Management with Elevated Access         | Add comments to planning applications at all times.                    | PSC Zoning Administrator<br>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<br>PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles  |
|--|--|--|
|  |  | PSC Plan Reviewer<br>PSC Permits Supervisor<br>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<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Inspections Supervisor<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>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 Fees and Payments

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

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

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

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

When fees are updated, fee notices are automatically sent out as set up by your agency. Your agency may send out notices with a consolidated list of fees on a regular basis. For more information, see [Setting Up Fee Notices](#).

### Viewing Fees and Payments for an Application

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

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

| Page Element                         | Description  |
|--------------------------------------|--|
|                                      | <ul style="list-style-type: none"> <li>○ <i>Payment in Process</i>: Indicates that the fee payment was initiated but not yet resolved. Typically this status is temporary and resolved to <i>Paid</i> once the payment is recorded in the application. When the status changes to <i>Paid</i>, click the <i>Paid</i> link to download and view the payment receipt in the format set up by your agency.</li> </ul>   |
| <b>Department</b>                    | The department within the agency requiring the payment.  |
| <b>Assessed Date</b>                 | The date the request for payment was issued.   |
| <b>Payment Date</b> (and payer name) | <p>The date payment was received.</p> <p>This field also displays the payer name, which depends on the payment method:</p> <ul style="list-style-type: none"> <li>○ Cash: The name provided by the customer to the cashier.</li> <li>○ Check: The name recorded during payment processing, usually the name on the check.</li> <li>○ Credit or debit card: The name returned by the payment processor.</li> <li>○ Offline: The name recorded during payment processing.</li> <li>○ PayPal: The name returned by the PayPal.</li> <li>○ Trust account: No name is displayed.</li> </ul> |
| <b>Payment Reference</b>             | The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.  |
| <b>Invoice</b>                       | The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.   |
| <b>Total Fees</b>                    | The total amount of fees that may be applicable to the application.  |
| <b>Total Payable</b>                 | <p>The amount of fees that are designated as payable.</p> <p>The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.</p>   |
| <b>Total Paid</b>                    | The amount of the total fees already collected.  |
| <b>Balance Due</b>                   | The remaining portion of the fees yet to be collected.   |
| <b>Pay</b>                           | Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment.  |

| Page Element | Description   |
|--------------|---|
|              | <p>If you want to make a partial payment, deselect the <i>Select All</i> check box to clear the check boxes for all the fee items and then select individual items. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p><b>Note:</b><br/>The <b>Pay</b> button takes applicants and contacts with application access directly to the Checkout page in payment services.</p> |

## Adding Ad Hoc Fees

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

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

To manually add a fee:

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

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

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

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

## Calculating Additional Fees

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

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

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

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

**Note:** This button may be disabled if the OIC is temporarily inactive. Once the OIC is active, you can start the Calculate Fees process.

6. On the Add Fees page, you'll see the calculated amounts and department for each fee item. If you want to add the calculated fee to the fees due for the application, select the fee and click **Add Selected**.

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

## Adjusting Fees

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

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

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

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

**Note:** Fees are also recalculated when agency staff or applicants click the **Pay** button on the Transactions page or Applications page, respectively, or on the Fees and Payments page. Applicants will also see the adjusted fees on their Make a Payment page. Contacts with application access can initiate payments and see adjustments only by using the **Pay** button for the application record on the Applications page or on the application's Fee and Payments page.



## Paying Fees

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

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

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

## Incomplete Payments

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

**Note:** You can reconcile card payments using the Sync Card Payment Status process. See [Reconciling Orphaned Card Payments](#).

## Refunding Fees

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

Here's how to refund permit fees:

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

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

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

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

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

You can process multiple partial refunds to PayPal, credit, or debit cards. Note the following for reconciliation purposes:

- The first refund (partial or full refund of the settlement amount) is posted as follow-on credit to the original settlement transaction in CyberSource.
- Subsequent partial refunds are posted as stand-alone credits in CyberSource.

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

### Related Topics

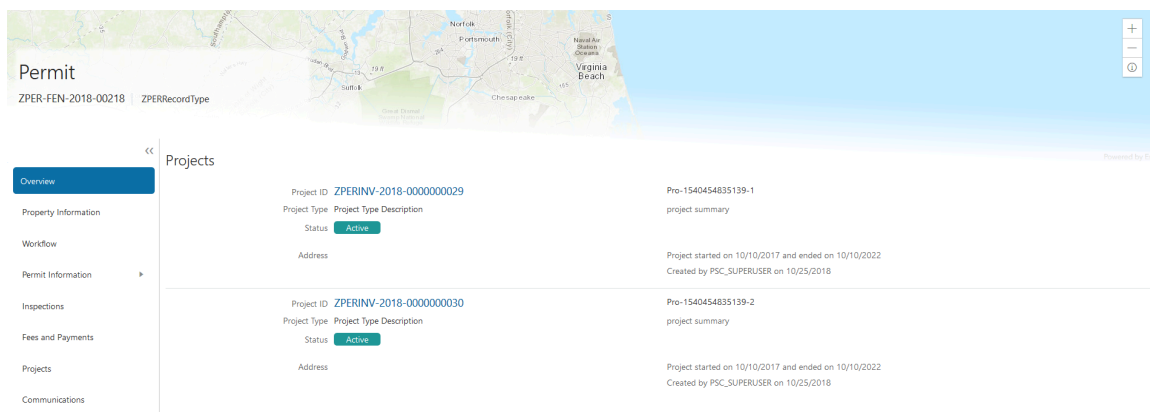
- [Viewing Payment History](#)

## Viewing Project Summaries

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

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

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



## Viewing the Project Summary

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

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

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

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

| Page Elements                           | Description  |
|---|--|
| <b>Project ID</b>                       | Click the project ID link to access the projects page that was created by agency staff. The project ID is automatically generated after saving the project.                |
| <b>Project Type</b>                     | Review the project type. A project type is based on the nature of the project and is set up during implementation, for example, Commercial Project or Residential Project. |
| <b>Status</b>                           | Review the status of the project. For example, <i>Active</i> , <i>Canceled</i> , <i>On Hold</i> , <i>Inactive</i> , or <i>Completed</i> .                                  |
| <b>Address</b>                          | Review the address of the project.   |
| Project Name                            | Review the name of the project.  |
| Project Summary                         | Review a summary of the project. The summary can be a long description of the project, as entered by the agency staff.   |
| Project Start Date and Project End Date | Review the start and end dates.  |
| Project Created By                      | Review the name of the person who created the project.   |

*Related Topics*

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

## Working with 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<br>PSC Geographical Information System Administrator<br>PSC Finance Administrator<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Building Inspector<br>PSC Business Analyst<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>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<br>PSC Planning Assistant |

| Primary Role | Access Description | Associated Job Roles and Abstract Roles   |
|--------------|--------------------|---|
|              |                    | PSC Associate Planner<br><br>PSC Geographical Information System Administrator<br><br>PSC Finance Administrator<br><br>PSC Economic Development Officer<br><br>PSC Cashier<br><br>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> <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><br/>The fields that are available to define on this page vary depending on the channel type and display format that you select.</p> |

| Page Elements                   | Definition  |
|---------------------------------|---|
| <p><b>Visibility</b></p>        | <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><br/>This option is presently not applicable for Code Enforcement.</p>  |
| <p><b>Display Format</b></p>    | <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><br/>This field does not appear for the <i>Text</i> channel type.</p>  |
| <p><b>Priority</b></p>          | <p>Turn this switch on to display the notification at the top of the notification list.</p> <p><b>Note:</b><br/>This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>  |
| <p><b>User Can Delete</b></p>   | <p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p><b>Note:</b><br/>This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>  |
| <p><b>Select and Insert</b></p> | <p>These fields enable you to insert 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> |

| Page Elements          | Definition   |
|------------------------|--|
| <b>Create Web Form</b> | Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.  |
| <b>Insert Web Form</b> | 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.   |
| <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><br/>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><br/>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><br/>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> |
| <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><br/>This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>   |

| Page Elements          | Definition   |
|------------------------|--|
| <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><br/>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><br/>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**.



- 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.<br><br>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.  |

- 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.
- Click **Insert Web Form** to insert the web form questions into the body of your message.
- 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.

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

## Working with Ad Hoc Communications

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

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

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

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

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

### Adding Ad Hoc Alerts

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

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

| Page Element             | Description  |
|--------------------------|--|
|                          | <ul style="list-style-type: none"> <li>○ All Anonymous Users</li> </ul> <p>Enter this attribute: <code>#{Anonymous}</code>.</p> <ul style="list-style-type: none"> <li>○ A Combination of Users</li> </ul> <p>Enter a string including comma-separated user IDs for the registered users, <code>#{User}</code> for all registered users, and <code>#{Anonymous}</code> for all anonymous users.</p>  |
| <b>Message Body</b>      | Enter the main body of the alert using plain, unformatted text.  |
| <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>Current date</i> attribute, and click <b>Insert</b>, the <code>#{Current Date}</code> variable appears in the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see <a href="#">Using Attributes in Communication Templates</a>.</p> |
| <b>Remarks</b>           | Enter any reference information for agency use. These remarks are not included in the displayed alert.   |

4. Click **Save**.

## Modifying Ad Hoc Alerts

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

## Deleting Ad Hoc Alerts

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

## Sending Ad Hoc Emails, Notifications, and Texts

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

| Page Elements       | Definition  |
|---------------------|---|
| <b>Channel Type</b> | Specify what type of ad hoc message you want to send. Values are: |

| Page Elements          | Definition   |
|------------------------|--|
|                        | <ul style="list-style-type: none"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> <li>○ <i>Notification</i>: Generates a notification that appears when users click the <b>Notifications</b> button in the header at the top of the page in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service.</li> </ul> <p><b>Note:</b><br/>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. All communications can be seen 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>  |
| <b>Display Format</b>  | <p>Select the display 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><br/>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><br/>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><br/>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>Current date</i> attribute, and click <b>Insert</b>, the <code>#{Current Date}</code> variable appears in the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see <a href="#">Using Attributes in Communication Templates</a>.</p> |
| <b>Reference</b>         | Enter a unique alphanumeric reference for the communication.   |
| <b>To</b>                | <p>Enter a value for the target recipients of the message.</p> <p>For notifications, enter comma-separated user IDs for the registered users, for example, <code>SYSTEM_ADMIN,BUSINESS_ANALYST</code>.</p> <p>For emails, enter comma-separated email addresses for the recipients, for example, <code>john.doe@example.com</code>.</p> <p>Enter comma-separated phone numbers for text messages.</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><br/>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><br/>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>                                 |
| <b>Subject</b>           | Enter a brief description of the purpose and content of the message.   |

| Page Elements              | Definition   |
|----------------------------|--|
|                            | <p><b>Note:</b><br/>This field does not appear for the <i>Text</i> channel type.</p>   |
| <p><b>Message Body</b></p> | <p>Enter the main body text of the message.</p> <p>For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> 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**.

## Viewing Ad Hoc Emails, Notifications, and Texts

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

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

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

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

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

## Viewing Application Status History

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

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

## Reviewing the Status History

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

4. Click the **Status History** link to view the Status History page for the permit or planning application.

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

*Related Topics*

- [Setting Up Transaction Statuses](#)

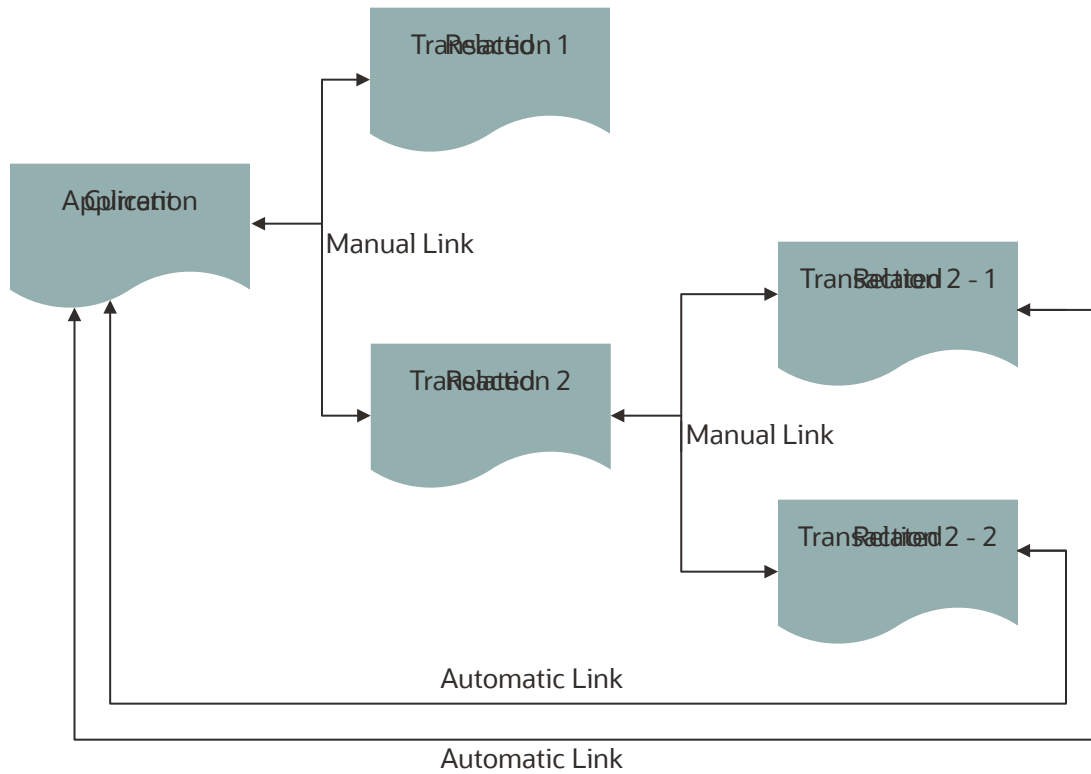
## Working with Related Transactions

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

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

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

Related transactions linking



## 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<br>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.<br><br><b>Note:</b><br>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 linking:</i> 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.



# 5 Working with Planning Application Expiration

## Security Details for Working with Planning Application Expiration

This topic describes important security roles, requirements, or considerations specific to working with planning application expiration.

| Primary Role                            | Access Description  | Associated Job Roles and Abstract Roles  |
|---|---|--|
| PSC Administer Planning Expiration Date | Administer the expiration date on the planning overview page. | PSC Zoning Administrator<br>PSC Principal Planner  |
| PSC Update Planning Expiration Date     | Update the expiration date on the planning overview page.     | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC System Administrator<br>PSC Principal Planner |

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](#).

## Expiration Overview

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

### Expiration Rules

Your agency defines expiration rules that determine the expiration dates for permits, planning applications, and business licenses. The expirations apply to different phases of the permit, planning application, or business license lifecycle. The system calculates expiration dates based on transaction statuses, or for business licenses with a fixed date expiration rule, a specified date. The rules can include grace periods, which provide extra time beyond the

expiration date for the user to take action. The rules also can include extensions for permits and planning applications, which provide a way for you to add time to the expiration timeframe. Note that pending inactive applications can't be extended.

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

## Business License Expiration Dates

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

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

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

## Business License Consultation Expiration Dates

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

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

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

## Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.  
The expiration timeframe begins when the user saves an application and ends with application submission.
- When the application expires.  
The expiration timeframe begins when the agency accepts an application and ends when the permit is issued.  
**CAUTION:** When an application expires, all plan review tasks associated with the application are canceled.
- When the permit expires.  
The expiration timeframe begins when the agency issues the permit and ends when the Certificate of Occupancy is issued or the permit is completed.

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

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

## Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.  
The expiration timeframe begins when the user starts an application and ends with application submission.
- When the entitlement expires.  
The expiration timeframe begins when the agency issues the completed entitlement and ends when the user submits the permit application.

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

## Pre-Application Expiration Dates

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.  
The expiration timeframe begins when the user starts an application and ends with application submission.
- When the pre-application expires.  
The expiration timeframe begins when the user completes the pre-application and ends when the user starts the planning application.

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

## Processing Expiration Status

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

Here's an example of how the processing works: An agency created a rule for solar permits that indicates pending applications expire in 30 days. The rule indicates that the permit is about to expire 5 days before the expiration date. When the pending application is inactive for 25 days, the application is about to expire, and at 30 days, the application expires. When expiration processing runs, the system updates the expiration dates for pending solar permit applications

to indicate that the application is about to expire and when it expired and sends out communications based on the updated status and the rule. If the rule includes a grace period, such as 3 days, the system status changes to expired after 33 days of inactivity.

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

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

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

## Working with Application Expiration

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

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

### Viewing the Expiration Dates

Here's how you can view expiration dates:

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

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

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

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

### Extending Expiration Dates

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

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

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



*Related Topics*

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

## Updating Application Expiration Status

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

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

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

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

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

## Entering Parameters to Process Expiration Rules

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

## Scheduling the Process

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

| Page Element | Description  |
|--------------|--|
| Frequency    | Select how frequently you want to run the process. Values are: <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> </ul> |

| Page Element             | Description   |
|--------------------------|---|
|                          | <p><b>Note:</b><br/><i>Daily</i> is the recommended option for running the expiration status update process.</p> <ul style="list-style-type: none"> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>                    |
| <b>Start Date</b>        | Enter the date on which you want to begin your scheduled processing.  |
| <b>End Date</b>          | Enter the date on which you want to end your scheduling processing.   |
| <b>Hours and Minutes</b> | <p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b><br/>These fields are available only if you select a process frequency of <i>Hours</i> or <i>Minutes</i>.</p>   |
| <b>Days</b>              | <p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b><br/>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><br/>This field is available only if you select a process frequency of <i>Weekly</i>.</p>   |
| <b>Repeat – By day</b>   | <p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> |

| Page Element                   | Description  |
|--------------------------------|--|
|                                | <p><b>Note:</b><br/>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>Repeat – 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><br/>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><br/>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.

# 6 Recording and Billing Time

## Security Details for Recording and Billing Time

This topic describes important security roles, requirements, or considerations specific to recording and billing time.

| Primary Role                                       | Access Description                                       | Associated Job Roles and Abstract Roles   |
|--|--|---|
| PSC Assess fees Time Recording on Permits for All  | Assess time recording on permits assigned to all.        | PSC Inspections Supervisor<br>PSC Chief Building Officer<br>PSC Planning Coordinator<br>PSC Permits Supervisor<br>PSC System Administrator                          |
| PSC Assess fees Time Recording on Permits for self | Assess time recording on permits assigned to themselves. | PSC Permit Technician   |
| PSC Permit Time Recording Inquiry                  | View time recording on permits.                          | PSC Agency Staff - All Agency users   |
| PSC Permit Time Recording Management All           | Manage time recording on permits assigned to all.        | PSC Inspections Supervisor<br>PSC Chief Building Officer<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Permits Supervisor<br>PSC System Administrator |
| PSC Permit Time Recording Management Self          | Manage time recording on permits assigned to themselves. | PSC Building Inspector<br>PSC Plan Reviewer<br>PSC Permit Technician  |

| Primary Role                               | Access Description  | Associated Job Roles and Abstract Roles           |
|--|---|---|
| PSC Planning Time Recording Inquiry        | View time recording on planning applications.                   | PSC Agency Staff - All agency users               |
| PSC Planning Time Recording Management All | Manage time recording on planning applications assigned to all. | PSC Zoning Administrator<br>PSC Principal Planner |

| Primary Role | Access Description | Associated Job Roles and Abstract Roles                              |
|--------------|--------------------|--|
|              |                    | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Plan Reviewer |

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 Time Entries

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

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

## Accessing Time Entry

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

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

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

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

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

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

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

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

## Adding a Time Entry

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

This is an example of the Time Details page

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

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

| Page Element      | Description   |
|-------------------|---|
| <b>Billable</b>   | Use this switch to indicate whether the time is billable. Whether this switch is turned on by default or can be overridden is determined by the time entry type that you select.  |
| <b>Assess Now</b> | Use this switch to indicate whether the fees associated with this time entry are assessed immediately when you save it.<br><br><b>Note:</b><br>This switch appears only for staff who have the ability to enter time for others. It is disabled when the Billable switch is turned off. |
| <b>Comments</b>   | Enter any additional information you want to record for the time entry.   |

4. Click **Save**.

## Modifying a Time Entry

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

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

## Assessing Fees for Time Entries

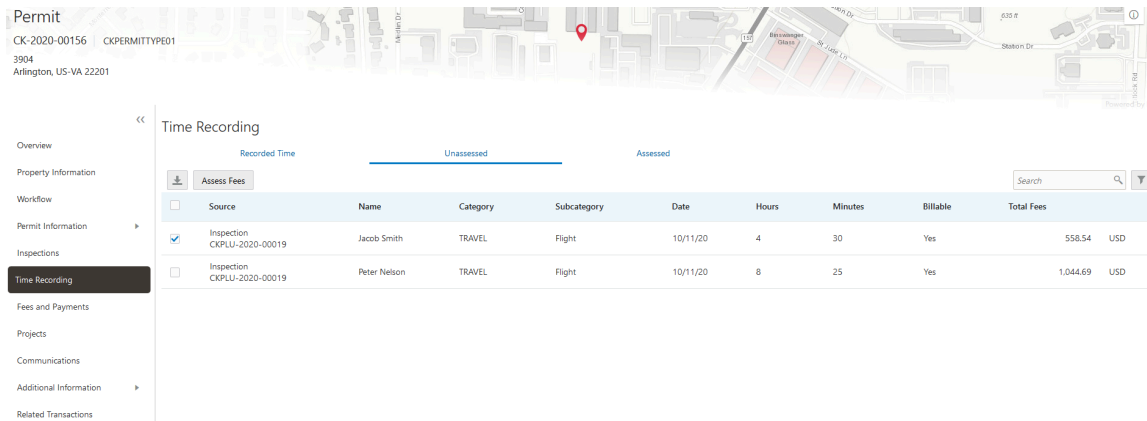
Agencies can bill for time spent by their staff working on transactions.

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

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

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





This page has three tabs:

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

## Security Details for Assessing Fees for Time Entries

This section describes important security roles, requirements, or considerations specific to assessing fees for time entries.

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles           |
|--|--|---|
| PSC Assess fees Time Recording on Planning applications for All  | Assess time recording on planning applications assigned to all.        | PSC Zoning Administrator<br>PSC Principal Planner |
| PSC Assess fees Time Recording on Planning applications for self | Assess time recording on planning applications assigned to themselves. | PSC Planning Assistant<br>PSC Associate 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](#).

## Assessing Fees for Time Entries

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

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

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

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

## Accessing Unassessed Time Fees from the Agency Springboard

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

This example shows the Unassessed Time Fees page

Unassessed Time Fees

Show All Statuses

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

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

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

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

# 7 Managing Plan Reviews

## Security Details for Managing Plan Reviews

This topic describes important security roles, requirements, or considerations specific to managing plan reviews in permits and planning applications.

| Primary Role   | Access Description  | Associated Job Roles and Abstract Roles  |
|--|---|--|
| PSC Registered Public User                                   | View plan reviews on applications on which the current user is the applicant. | PSC Registered Public User   |
| PSC Agency Permits Inquiry                                   | View all plan reviews and comments.   | PSC Agency Staff - All agency users  |
| PSC Agency Planning and Zoning Inquiry                       | View all plan reviews and comments.   | PSC Agency Staff - All agency users  |
| PSC Add Comments to Plan Reviews Assigned to Self            | Add comments to plan reviews assigned to self.                                | PSC Plan Reviewer  |
| PSC Add Comments to Plan Reviews Assigned to Others and Self | Add comments to all plan reviews.   | PSC System Administrator<br>PSC Planning Coordinator<br>PSC Permits Management with Elevated Access  |
| PSC Update Plan Review Comments Added by Self                | Update plan review comments added by self.                                    | PSC System Administrator<br>PSC Plan Reviewer<br>PSC Planning Coordinator<br>PSC Manage Plan Review Cycles in Planning Applications All<br>PSC Manage Plan Review Cycles in Planning Applications Self |
| PSC Update Plan Review Comments Added by Others and Self     | Update plan review comments added by others and self.                         | PSC System Administrator<br>PSC Planning and Zoning Application Administrator  |
| PSC Delete Plan Review Comments Added by Self                | Delete plan review comments added by self.                                    | PSC System Administrator<br>PSC Plan Reviewer<br>PSC Planning Coordinator<br>PSC Manage Plan Review Cycles in Planning Applications All  |

| Primary Role   | Access Description   | Associated Job Roles and Abstract Roles                                       |
|--|--|---|
|  |  | PSC Manage Plan Review Cycles in Planning Applications Self                   |
| PSC Delete Plan Review Comments Added by Others and Self           | Delete plan review comments added by others and self.  | PSC System Administrator<br>PSC Planning and Zoning Application Administrator |
| PSC Add Documents to Plan Review Cycles                            | Add documents to plan review cycles for review by plan reviewers.  | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Remove Documents from Plan Review Cycles                       | Remove documents from a plan review cycle.   | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Add Reviewer to Permit Plan Review                             | Add reviewer to permit plan review.  | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Remove Reviewer from Permit Plan Review                        | Remove reviewer from permit plan review.   | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Update Plan Review Decision Status Assigned to Self            | Update plan review decision status assigned to self.   | PSC Plan Reviewer   |
| PSC Update Plan Review Decision Status Assigned to Others and Self | Update plan review decision status assigned to others and self.  | PSC System Administrator  |
| PSC Manage Plan Review Cycles in Planning Applications Self        | Manage plan review cycles in planning applications assigned to self.   | PSC Associate Planner   |
| PSC Override Status of Permit Plan Reviews                         | Override status of permit plan reviews.  | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Cancel Cycle of Permit Plan Review                             | Cancel cycle of permit plan review.  | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Add Session Cycle for Plan Review Cycles                       | Add a Bluebeam Studio™ Session for a plan review cycle for electronic document review.                         | PSC System Administrator<br>PSC Planning Coordinator                          |
| PSC Update Session to Finalized for Plan Review Cycles             | Update a Bluebeam Studio™ Session to finalized for a plan review cycle to close the cycle for document review. | PSC System Administrator<br>PSC Planning Coordinator                          |

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](#) guide.

## Plan Review Overview

Some applications require a plan review to evaluate the proposed project. The documentation is reviewed by all pertinent city departments to ensure compliance with applicable codes and regulations before permits are issued or for planning and zoning.

Plan reviews are tracked in Oracle Public Sector Licensing and Permitting as part of permit and planning application workflow. Agency setup determines whether a plan review is required for a permit or planning application type. For more information, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Any review cycle for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™, an electronic document review tool.

**Note:** To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications.

This is what the steps for a plan review look like:

1. A registered public user submits a permit or planning application that requires review by agency staff.
2. A permit technician or assigned planner assigns a status to the transaction that requires a plan review. This triggers the automatic creation of the first plan review cycle. For more information, see [Using Workflow](#).
3. If configured by the agency, the system automatically assigns departments and reviewers to the first cycle of the plan review. The plan coordinator can also manually assign reviewers to a plan review cycle in the permit or planning application details, or on the Plan Review Console. See [Managing Plan Reviewers](#) and [Using the Plan Review Console](#).
4. The plan coordinator attaches documents, if any, to the plan review cycle from the application attachments. See [Managing Plan Review Documents](#).
5. When an integration with Bluebeam Studio™ exists, the plan coordinator can initiate an electronic Studio Session for the plan review cycle at any time until the review cycle is complete or continue with a manual review cycle. See [Working with Electronic Plan Reviews](#).
6. The assigned plan reviewers complete their review. See [Performing Plan Reviews](#).
7. The plan coordinator adds new plan review cycles and repeats the review process as necessary until the review is complete. See [Managing Plan Review Cycles](#).

Plan reviews can be created and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a pre-submittal or terminal status.

Permit statuses:

- Yes, you can create or update plan reviews for permits in these permit statuses: *About to Expire, Accepted, Delinquent, Expired, In Process, Inspection, Permit Issued, Plan Review, and Submitted*.
- No, you can't create or update plan reviews for permits in these permit statuses: *Certificate of Occupancy, Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn*.

Planning application statuses:

- Yes, you can create or update planning application plan reviews in these planning application statuses: *About to Expire, Application Accepted, Delinquent, Expired, Hearing, In Process, Plan Review, and Submitted.*
- No, you can't create or update planning application plan reviews in these planning application statuses: *Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn.*

## Plan Review Workflow

The plan review workflow for the plan coordinator appears on the Task Management page.

As a plan coordinator, you sort tasks by *Workflow*. For more information about workflow, see [Using Workflow](#).

When the last reviewer provides a decision status for a plan review cycle, it is automatically closed. Upon closing, the overall review status changes to *Complete*. If a review cycle uses a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: *Rejected, Revision Required, Approved with Comments, Approved, and Not Required.*

Workflow is automatically moved forward to the next step when all of the following criteria are met:

- The current plan review cycle status is *Complete*.
- The plan review decision is *Approved, Approved with Comments, or Not Required*.
- The review cycle has been finalized, if a Bluebeam Studio™ Session was used.

If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

The workflow process definition must identify the plan review task and the action to take when auto-advancing. For more information, see [Using Custom Properties](#).

## Managing Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a series of plan reviews for a permit or planning application completed by multiple reviewers.

You manage review cycles on the Plan Reviews page in the permit or planning application details. This topic discusses these review cycle tasks:

- Add plan review cycles.
- Add plan review due dates.
- Cancel plan review cycles.
- View the different plan review cycles.
- Record time for plan reviews.
- Access conditions of approvals for planning applications.

Your agency can conduct reviews that contain both manual cycles and electronic cycles using Bluebeam Studio™. For information about starting a Bluebeam Studio™ Session during a review cycle, see [Working with Electronic Plan Reviews](#).

To access the Plan Reviews page for a transaction:

1. Select the **Plan Reviews** tile on the Agency Springboard.
2. Select a plan review row on the **All Reviews**, **Open Reviews**, or **Unassigned Reviews** tabs.
3. In the navigation panel of the permit or planning application details, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.

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

## Adding Plan Review Cycles

The first cycle of a plan review is automatically created when a permit technician or assigned planner moves the transaction into *Plan Review* status. If you manually create a plan review cycle before the *Plan Review* status, the system won't automatically create the cycle. You add subsequent cycles until the plan review is complete.

Review cycles can be added and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a pre-submittal or terminal status. For more information, see [Plan Review Overview](#).

1. On the Plan Reviews page, click the **Add Review Cycle** button to add a new plan review cycle.  
This button is available only when all other plan review cycles for the transaction are complete or canceled.
2. On the Add Plan Review page, edit or enter the review cycle name.  
If **Enable Default of Plan Review Name** is turned on for the agency, the default review cycle name is the name of the previous cycle. Otherwise, there is no default name. You can update the cycle name at any time on the Plan Review page.
3. Select **Copy reviewers from most recent cycle** if you want to copy the reviewers from the previous cycle, whether the previous cycle was manual or electronic.
4. If your agency integrates with Bluebeam Studio™, you have two additional options:
  - o Click **Copy Documents** to copy documents from the previous cycle if the cycle was electronic.
  - o Click **Create Studio Session** to start a Bluebeam Studio™ Session, which makes the new cycle electronic.  
You can also start a Studio Session later, while the review cycle is in progress. For more information about working with an electronic plan review cycle, see [Working with Electronic Plan Reviews](#).
5. Click the **Add** button.

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

## Adding Plan Review Due Dates

If you want to add a due date for a plan review cycle, click **Edit** next to the **Due Date** field and select a due date. If **Enable Cascading Cycle Due Date** is turned on for the agency, the due date you enter here is automatically entered for any reviewer due dates that are blank. Additionally, you can click the **Copy Plan Review Cycle Due Date to Plan Reviewers** button next to the **Due Date** field to overwrite all plan reviewer dates with the due date for the plan review cycle.

You can set up the system to send communications when cycle or reviewer due dates are approaching. For more information, see [Setting Up Notifications for Plan Review Due Dates](#).

For more information on agency-level plan review options, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#).

## Canceling Plan Review Cycles

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

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

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

## Viewing the Different Plan Review Cycles

You can switch between plan review cycles to view details for each cycle, including the **Reviewers** and **Documents** grids.

1. Click the **Switch Cycle** link in the plan review header details.  
This link is available only when there are two or more plan review cycles.
2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.  
The refreshed page shows the cycle header details and reviewers for the selected cycle.

## Recording Time for Plan Reviews

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

## Accessing Conditions of Approval for Planning Applications

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

## Using the Plan Review Console

Accessible from the Plan Reviews tile on the agency springboard, the Plan Review Console provides centralized views for managing your agency's plan reviews. You can assign plan reviews on the unassigned reviews page and navigate to the permit or planning application's plan review details by clicking a plan review row on any page in the console.

The console displays only the plan review cycles associated with the permit types, planning application types, and plan reviewer departments specified in the job attributes for the plan coordinator's job function. For more information on defining these job attributes, see [Setting Up Agency Staff](#).









The Plan Review Console comprises these pages:

- Plan Reviews - All Reviews page
- Plan Reviews - Open Reviews page



- Plan Reviews - Unassigned Reviews page
- Plan Reviews - Pending Reviews page

In addition to pertinent plan review information on each page, icons are used to provide additional details about the transaction or plan review and available actions as shown here:

| Page Element   | Description  |
|--|--|
|   | Indicates the column that shows condition icons when a grid is displayed in the expanded format.<br><br>For more information about conditions placed on permits or planning applications, see <a href="#">Applying Conditions to Applications</a> .  |
|  Lock<br><br> Hold<br><br> Notice | Appears in the transaction row to indicate that one or more conditions have been applied to the transaction. The icon for the most severe condition is displayed. Click the icon to view condition information. See also <a href="#">Setting Up Conditions</a> .   |
|   | Indicates an electronic plan review cycle with a Bluebeam Studio™ Session.   |
|   | Indicates that fees are due for the transaction. Click the <b>Fees Due</b> icon to view more details.  |
|   | Indicates that an applicant has uploaded a PDF document to a permit or planning application that's in a plan review status.<br><br>Click to open the Uploaded Documents page, where uploaded documents can be previewed.   |
|   | Click the <b>Actions</b> menu button for a permit or planning application to see the actions menu, where you can select an available action: <ul style="list-style-type: none"> <li>• <b>Add Cycle Comments</b> - Add a cycle-level comment to the current plan review cycle for a permit or planning application that's in progress. Only available on the All Reviews page.</li> <li>• <b>View Plan Comments</b> - Review a list of consolidated plan comments for the permit or planning application.</li> <li>• <b>View Cycle History</b> - Review cycle and reviewer statuses and decisions across all cycles as well as reviewer due dates and the length of time a cycle was open.</li> </ul> |

**Note:** For information about expanded and condensed grid formats and common grid controls, see [Using Grids](#) and [Personalizing Grid Displays](#).

## All Reviews

The All Reviews page displays in-progress plan review cycles by assigned department and reviewer. When the **Show All Cycles** switch is turned on, you'll also see the closed review cycles for the permit and planning applications in the list.

This example illustrates the Plan Reviews - All Reviews page in the Plan Review Console. The grid is shown in the condensed format, where several fields appear in a column.

### Plan Reviews

| All Reviews  |                             |  | Open Reviews             |              | Unassigned Reviews |                             |           |                |  |
|--|-----------------------------|--|--------------------------|--------------|--------------------|-----------------------------|-----------|----------------|--|
| Application  | Property                    | Description  | Reviewer                 | Reviewer Due | Reviewer Decision  | Cycle                       | Cycle Due | Cycle Decision |  |
| RESADD-2021-00121 Residential Addition Plan Review | 1401 FERNSIDE BL ALAMEDA    | Second story 1100 square foot addition. Three bedrooms, two bathrooms and loft.                  | Building Ann Bradford    | 10/11/21     |                    | Cycle 2 9/30/21 In Progress | 10/11/21  |                |  |
| RESADD-2021-00121 Residential Addition Plan Review | 1401 FERNSIDE BL ALAMEDA    | Second story 1100 square foot addition. Three bedrooms, two bathrooms and loft.                  | Planning Jonathan Powers | 10/11/21     |                    | Cycle 2 9/30/21 In Progress | 10/11/21  |                |  |
| RESADD-2021-00121 Residential Addition Plan Review | 1401 FERNSIDE BL ALAMEDA    | Second story 1100 square foot addition. Three bedrooms, two bathrooms and loft.                  | Fire                     | 10/11/21     |                    | Cycle 2 9/30/21 In Progress | 10/11/21  |                |  |
| RESADD-2021-00122 Residential Addition Plan Review | 3273 Central Avenue ALAMEDA | First story addition of 1000 square feet including an expansion of the kitchen and wall removal. | Planning Jonathan Powers | 10/11/21     |                    | Cycle 1 9/30/21 In Progress | 10/11/21  |                |  |
| RESADD-2021-00122 Residential Addition Plan Review | 3273 Central Avenue ALAMEDA | First story addition of 1000 square feet including an expansion of the kitchen and wall removal. | Building Ann Bradford    | 10/11/21     |                    | Cycle 1 9/30/21 In Progress | 10/11/21  |                |  |

Each plan review listed includes transaction, property, reviewer, and cycle information.

You can use a variety of date filters to view the plan reviews.

Select a value in the **Date Type Filter** list:

- *Cycle Due* - The date when the plan review cycle is scheduled to be completed.
- *Cycle Created* - The date when the plan review cycle was created.
- *Reviewer Due* - The date by which the plan reviewer must provide a decision.
- *Reviewer Decision* - The date when the plan reviewer provided a decision.
- *Cycle Decision* - The date when the cycle decision was provided.
- *All Dates* - All date types.

Then select a value in the **Time Frame** list:

- *Today*
- *Yesterday*
- *Tomorrow*
- *Last 14 Days or Next 14 Days*
- *Last 30 Days or Next 30 Days*
- *Date Range* - Enter start and end dates in the provided fields when you select this option.

Click a cycle row to open the application's Plan Reviews page.

## Open Reviews

Plan coordinators can see a list of plan reviews that don't have a cycle decision yet on the Open Reviews page.

This example illustrates the Plan Reviews - Open Reviews page in the Plan Review Console. The grid is shown in the condensed format, where several fields appear in a column.

### Plan Reviews

| All Reviews |           | Open Reviews      |  | Unassigned Reviews   |                                |  |
|-------------|-----------|-------------------|--|----------------------|--------------------------------|--|
| Cycle       | Cycle Due | Application       | Submitted  | Property             | Description                    |  |
| ▶           | 1         | 10/6/21           | RESADD-2021-00123<br>Residential Addition<br>Plan Review | 9/30/21              | 1401 Fernside Blvd<br>ALAMEDA  | 1300 SQ FT second story add on. Three bedrooms, bathroom and loft.                               |
| ▶           | 1         | 10/6/21           | RESADD-2021-00126<br>Residential Addition<br>Plan Review | 9/30/21              | 1614 Wood Street<br>ALAMEDA    | Expand kitchen 200 sq ft and add kitchen island.   |
| ▶           | 1         | 10/6/21           | RESADD-2021-00128<br>Residential Addition<br>Plan Review | 9/30/21              | 3273 Central Avenue<br>ALAMEDA | 500 sq ft additional living space with removal of one wall.                                      |
| ▶           | 2         | 10/11/21          | RESADD-2021-00121<br>Residential Addition<br>Plan Review | 9/28/21              | 1401 FERNSIDE BL<br>ALAMEDA    | Second story 1100 square foot addition. Three bedrooms, two bathrooms and loft.                  |
|             |           | <b>Department</b> | <b>Reviewer</b>  | <b>Assigned Date</b> | <b>Due Date</b>                | <b>Decision</b>  |
|             |           | Planning          | Jonathan Powers  | 9/30/21              | 10/11/21                       | >  |
|             |           | Fire              |  | 9/30/21              | 10/11/21                       | >  |
|             |           | Building          | Ann Bradford   | 9/30/21              | 10/11/21                       | >  |
| ▶           | 1         | 10/11/21          | RESADD-2021-00122<br>Residential Addition<br>Plan Review | 9/30/21              | 3273 Central Avenue<br>ALAMEDA | First story addition of 1000 square feet including an expansion of the kitchen and wall removal. |

The row for each plan review cycle displays cycle, application, and property information. Each cycle row expands to show the departments and reviewers assigned to the cycle, reviewer assigned and due dates, reviewer decision, and decision date. You can select the reviewer row and add or change the assigned reviewer. The reviewer due date can also be updated.

Click a cycle row to open the application's Plan Reviews page.

## Unassigned Reviews

The Unassigned Reviews page enables plan coordinators to view:

- Plan review cycles with one or more departments that have no reviewer assigned.
- Required departments that aren't in the cycle.

This example illustrates the Plan Reviews - Unassigned Reviews page in the Plan Review Console. The grid is shown in the condensed format, where several fields appear in a column.

Plan Reviews

| Plan Reviews                                  |           |              |        |  |                                |  |
|---|-----------|--------------|--------|--|--------------------------------|--|
| All Reviews                                   |           | Open Reviews |        | Unassigned Reviews   |                                |  |
| Plan Review                                   | Cycle Due | Department   | Assign | Application Type   | Property                       |  |
| RESADD-2021-00126<br>Initial Review   Cycle 1 | 10/6/21   | Fire         |        | Residential Addition<br>Expand kitchen 200 sq ft and add kitchen island.   | 1614 Wood Street<br>ALAMEDA    |  |
| RESADD-2021-00121<br>Fire Revision   Cycle 2  | 10/11/21  | Fire         |        | Residential Addition<br>Second story 1100 square foot addition. Three bedrooms, two bathrooms and loft.                  | 1401 FERNSIDE BL<br>ALAMEDA    |  |
| RESADD-2021-00122<br>Initial Review   Cycle 1 | 10/11/21  | Fire         |        | Residential Addition<br>First story addition of 1000 square feet including an expansion of the kitchen and wall removal. | 3273 Central Avenue<br>ALAMEDA |  |
| RESADD-2021-00127<br>Initial Review   Cycle 1 | 10/12/21  | Fire         |        | Residential Addition<br>200 sq ft office addition to second story.   | 1428 Walnut Street<br>ALAMEDA  |  |

Each row displays the transaction ID, cycle name and number, cycle due date, unassigned department, application type, and property.

Click the **Assign** icon for a plan review to open the Add Reviewers page: .

The tabs on the Add Reviewers page list plan reviewers that are associated with the property’s plan review district, if there’s a district associated with the parcel, and all reviewers. You can filter reviewers by department and assign reviewers to the cycle.

For more information about assigning reviewers, see [Managing Plan Reviewers](#).

## Pending Reviews

The Pending Reviews page helps agency staff manage plan reviews with revised documents or waiting for revised documents. Permits and planning applications appear in the pending reviews list when:

- The application is in a plan review status and the applicant has uploaded a PDF document.  
Applications in a plan review status again after the plan was approved, approved with comments, or not required also appear in the list.
- The last plan review cycle was completed with a decision of *Rejected* or *Revision Required*.

This example illustrates the Plan Reviews - Pending Reviews page in the Plan Review Console. The grid is shown in the expanded format, where each column displays only one field.

| Plan Reviews |               |               |       |                    |                      |                    |           |               |         |   |         |  |  |
|--------------|---------------|---------------|-------|--------------------|----------------------|--------------------|-----------|---------------|---------|---|---------|--|--|
| All Reviews  |               | Open Reviews  |       | Unassigned Reviews |                      | Pending Reviews    |           |               |         |   |         |  |  |
| Decision     | Decision Date | Review Name   | Cycle | Application        | Application Type     | Application Status | Submitted | Property      | City    | Description   | Actions |  |  |
| Rejected     | 1/12/22       | Second Review | 2     | RESADD-2022-00003  | Residential Addition | Plan Review        | 1/12/22   | Walnut Street | ALAMEDA | A 250 square foot kitchen extension to a residence. Includes a new kitchen island and sink. |         |  |  |

When an applicant adds a PDF document to the permit or planning application, an Uploaded Documents icon appears on the permit or planning application row in the pending reviews list as shown in this example. Click the icon to open the Uploaded Documents page where you can preview the file and mark the document as seen.

Click the application row to open the application's Plan Reviews page, where you can create a new cycle and add revised documents to the cycle. For more about working with revised documents, see [Managing Plan Review Documents](#).

## Working with Electronic Plan Reviews

Your agency can conduct plan reviews that contain electronic plan review cycles.

Review cycles for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™, an electronic document review tool. When you start a Studio Session, the plan review cycle is considered electronic. The next cycle can be manual or electronic.

**Note:** To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications. For the integration to work, add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ Prime portal.

You can start a Studio Session when you add a new plan review cycle or at any time during a review cycle until the cycle is complete.

1. Click **Create Studio Session** on the Add Plan Review page while adding a new plan review cycle or click **Create Studio Session** on the Plan Review page for the review cycle you're working with.

Documents and reviewers already in the cycle are automatically added to the session. You can also add or delete documents and add reviewers during the Studio Session, but you can't delete reviewers. For more information, see [Managing Plan Review Documents](#) and [Managing Plan Reviewers](#).

2. Mark up documents in Bluebeam Studio™. When a document is copied back to the review cycle, the state in the Documents grid is *Marked Up*.
3. When all reviewers have provided a decision, the **Finalize Session** button is enabled. Click **Finalize Session** to complete an electronic cycle.

During the finalization process, the marked up documents are copied back from Bluebeam Studio™. Documents marked up by reviewers are saved in the plan review documents grid and with the permit attachments. The documents can be copied into the next plan review cycle.

## Managing Plan Reviewers

After creating a plan review cycle, you can manually add plan reviewers on the Plan Reviews page for a permit or planning application. Depending on agency configuration, the system can automatically assign reviewers for the first review cycle.

For information about manually assigning reviewers in the Plan Review Console, see [Using the Plan Review Console](#).

For information about overriding a plan reviewer decision, see [Performing Plan Reviews](#).

## Using Automatic Assignment

If **Enable Auto Assignment** is selected in the transaction type settings, a reviewer row is automatically added to the plan review cycle for each required plan reviewer department selected for the transaction type. For more information about plan review settings for automatic assignment and required plan reviewer departments, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Additionally, the department lead for each department is automatically assigned as the reviewer. For information about defining a department lead, see [Setting Up Plan Reviewer Departments](#).

## Manually Adding Reviewers to Plan Reviews

When your agency requires plan review departments for the transaction type associated with the transaction, those departments are displayed above the **Reviewers** grid. When you add a reviewer from a required department to the plan review cycle, that department no longer appears.

You can start a Bluebeam Studio™ Session at any time and the reviewers in the **Reviewers** grid will be automatically added to the Studio Session. If you add more reviewers while the Studio Session is in progress, they'll be added to the Studio Session, too. For the integration to work, you must add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ Prime portal.

Reviewers are available to add only when they have a transaction type job attribute that matches the transaction type of the transaction. For more information on assigning job attributes, see [Managing Agency Staff Profiles](#).

1. On the Plan Reviews page in the transaction details, click the **Add Reviewers** button.

You can also add reviewers from the Unassigned Reviews page in the Plan Review Console. See [Using the Plan Review Console](#).

The Add Reviewers modal page displays available district reviewers and all available reviewers by department on separate tabs.

- o **District Reviewers**

If the parcel or address for the transaction is associated with a plan review district, the reviewers that have the matching plan review district job attribute are available on the District Reviewers tab. The tab is only available if a plan review district is assigned to the transaction.

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

- o **All Reviewers**

Select the All Reviewers tab to view all reviewers regardless of which plan review district is assigned to them.

The required departments are displayed on each tab and you can filter the available reviewers by department. For more information on plan reviewer departments, see [Setting Up Plan Reviewer Departments](#).

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

2. Select the check box next to each reviewer that you want to add.

The reviewers selected to be assigned appear on the Selections tab, which displays the number of selected reviewers in the tab title.

3. Click **Save**.

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

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

## Removing Reviewers from Plan Reviews

As a plan coordinator, you can remove or delete plan reviewers from a plan review cycle on the Plan Reviews page unless a Bluebeam Studio™ Session is in progress.

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

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

You can't delete a reviewer when:

- The reviewer has added comments or entered a decision.
- A Studio Session is in progress.

However, you can change the assigned reviewer to another reviewer or manually change the decision to *Not Required* on the Plan Review Decision Details page.

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

## Changing the Reviewer Assigned to a Plan Review

An agency's plan coordinator can change the reviewer assigned to a plan review on the Plan Review Decision page while the review is still in progress.

1. In the **Reviewers** grid on the Plan Reviews page, click the **View More Details** button for the selected plan reviewer.
2. On the Plan Review Decision Details page, select a name from the **Reviewer** drop-down list.

You can also change the assigned reviewer on the Open Reviews page of the Plan Review Console by expanding the cycle row and clicking the reviewer row. For more information, see [Using the Plan Review Console](#).

## Managing Plan Review Documents

Agency staff can add and remove plan review documents on the Plan Reviews page for a permit or planning application. Documents can be added and removed during both manual and electronic cycles. This topic also describes working with revised documents provided by applicants.

### Adding Documents to a Plan Review

Documents can be added during both manual and electronic cycles until the cycle is completed, even if some reviewers have provided a decision.

Documents added to a plan review cycle are automatically added to a Bluebeam Studio™ Session that is already in progress. Documents can also be deleted when a Studio Session is in progress. If a document fails to upload to

Bluebeam Studio™ or if the upload status is *No*, you can use the **Retry** button to initiate the upload process again. For more information, see [Working with Electronic Plan Reviews](#).

1. On the Plan Reviews page in the transaction details, click the **Add Documents** button.
2. On the Add Documents page, select the documents that you want to attach to the plan review cycle. The list displays PDF documents on the application's Attachments page that haven't been added to the plan review yet.
3. Click **Save**.

The document appears in the **Documents** grid with the file name, description, document state, and date added to the plan review cycle. The state of the document appears as follows:

- *Initial* - Displayed when the document is added to the cycle.
- *Resubmitted* - Displayed when a document with the same name is added to the cycle. Applicants typically upload a revision to the plan review documents after a plan review cycle was rejected or required revisions. Revised documents should be uploaded with the same file name. Once they are added, they are considered *Resubmitted*.
- *Marked Up* - Displayed when a document that is marked up in Bluebeam Studio™ Session is copied back to the cycle and the Attachments page in the application details.

Only the marked up documents in the **Documents** section can be copied into the next plan review cycle.

## Working with Revised Documents

Applicants upload revised documents to the Attachments page in their permit or planning applications when requested by agency staff. An uploaded documents icon indicates that a PDF file has been uploaded to an application with a *Plan Review* status. You'll see the icon on pages in the Plan Review Console as well as on the Attachments page in the application details.

When plan coordinators are waiting for a revised document, they can use the Pending Reviews page in the Plan Review Console to check whether an uploaded document is a revision. For more information, see [Using the Plan Review Console](#).

Here's how to manage a revised plan review document:

1. When the applicant adds a PDF document to the permit or planning application, an **Uploaded Documents** icon appears on the permit or planning application row in the Plan Review Console.
2. Click the icon to open the Uploaded Documents page.
3. You can click the PDF preview icon or thumbnail image to help identify the documents.
4. You can also clear the uploaded documents indicator by clicking **Mark as Seen**, if desired.
5. Click the **Close** icon on the modal page to return to the Pending Reviews page.
6. Click the permit or planning application row to open the application's Plan Reviews page.
7. Create a new cycle and add the revised document to the cycle.

After a revised document is added to a cycle, the **Uploaded Documents** icon is automatically cleared.

## Performing Plan Reviews

Plan reviewers perform reviews of documents and enter their decisions. In some cases, the agency's plan coordinator overrides a plan reviewer's existing decision.



As a plan reviewer, you view a list of plans assigned to you on the Task Management page and provide your plan review decision and comments on the Plan Review Decision Details page. The plan coordinator also enters override decisions on the Plan Review Decision Details page.

This example shows the Plan Review Decision Details page.

Reviewers and plan coordinators can provide decisions whether or not documents are identified for a cycle.

Once all reviewers have provided a decision for a review cycle with a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

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

## Viewing Plan Reviews Assigned to You

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

1. Select **Worklist** on the Agency Springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Review Decision Details page, or by clicking the **Copy Plan Review Cycle Due Date to Plan Reviewers** button on the Plan Reviews page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.

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

**Note:** All plan reviews that are assigned to you, including both manual and electronic document reviews, appear on this page.

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

For more information on the Task Management page, see *Managing Tasks*.

## Adding a Plan Review Decision

As a plan reviewer, you can add your plan review decision on the Plan Review Decision Details page. You can modify your decision until the plan review cycle is closed or canceled, but you can't modify your decision if the plan coordinator overrides your decision.

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. Select the transaction that you want to update with your plan review decision.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the **Reviewers** grid, click the **View More Details** button for your row.
5. On the Plan Review Decision Details page, select a value from the **Decision** list.

You can select from these system-defined decision statuses:

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

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

6. Click **Add Comments** to enter comments for your review.

You can't edit comments once the plan review cycle or transaction is closed or canceled.

7. Click the **Save** button.

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

## Overriding Plan Reviewer Decisions

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

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

1. Select the **Plan Reviews** tile on the Agency Springboard.
2. Click the Open Reviews tab in the Plan Review Console.

3. Select a plan review cycle.
4. In the **Reviewers** grid on the Plan Reviews page in the transaction details, click the **View More Details** button for the selected plan reviewer.
5. On the Plan Review Decision Details page, select a value from the **Override Decision** list.  
You can select from these decisions:
  - o *Approved*
  - o *Approved with Comments*
  - o *Revision Required*
  - o *Rejected*
  - o *Not Required*
6. Click **Add Comments** to enter comments for the override decision.  
You can't edit comments once the plan review cycle or transaction is closed or canceled.
7. Click the **Save** button.  
The system updates the plan reviewer's **Decision Date** timestamp and enters *Yes* in the **Override** field.

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

## Managing Plan Review Comments

Comments can be added when providing plan review decisions or at the review cycle level. Plan coordinators and plan reviewers can also update and delete their own cycle-level and reviewer-level comments.

Here's how you can manage plan review comments.

### Cycle-Level Comments

Plan coordinators and plan reviewers can add comments at the review cycle level:

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button.

Plan coordinators and plan reviewers can also update and delete their own cycle-level comments. Click the comment row to open the Comment details page. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can't update or delete comments once the plan review cycle or transaction is closed or canceled.

### Reviewer-Level Comments

Plan reviewers can add decision comments to their own plan reviews. Plan coordinators can add decision comments for plan reviews assigned to any reviewer:

Click **Add Comments** at the bottom of the Plan Review Decision Details page to enter comments for your review or override decision. For more information, see [Performing Plan Reviews](#).

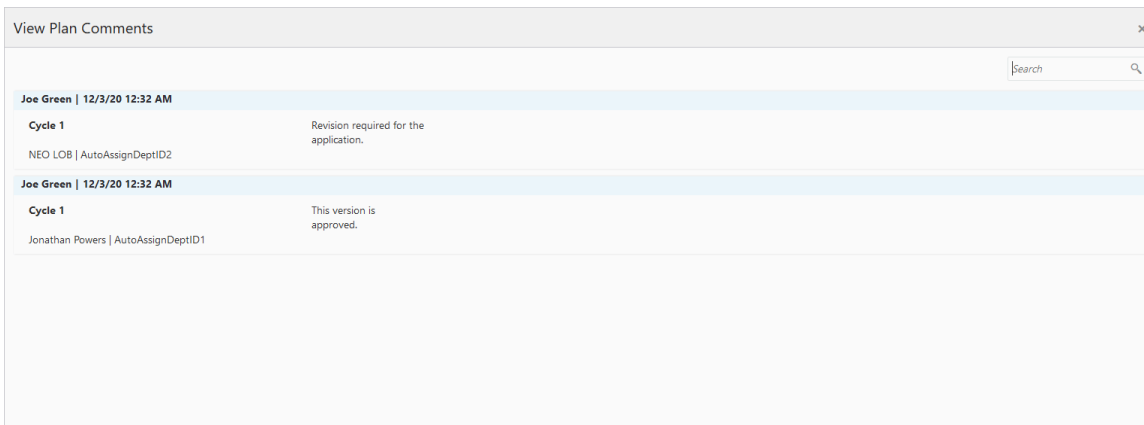
Plan coordinators and plan reviewers can also update and delete their own reviewer-level comments. Click the comment row on the Plan Review Decision Details page to open the Comment details page. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can't update or delete comments once the plan review cycle or transaction is closed or canceled.

## All Comments

Plan coordinators, plan reviewers, and applicants can view all comments entered for all cycles of a plan review:

Click the **View Plan Comments** link at the top of the transaction's Plan Reviews page.

This example shows the View Plan Comments page.



The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. Applicants can't see the plan reviewer names. The comments listed on this page are searchable.

# 8 Managing Projects

## Security Details for Managing Projects

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

| Primary Role                               | Access Description  | Associated Job Roles and Abstract Roles  |
|--|---|--|
| PSC Projects Inquiry                       | View public sector projects.  | All users including users without login  |
| PSC Project Management                     | Manage projects to which the user is assigned as the project manager. | PSC System Administrator<br>PSC Registered Public User<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer   |
| PSC Project Administration                 | Manage all projects.  | PSC Planning and Zoning Application Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Inspections Supervisor<br>PSC Chief Building Officer<br>PSC Building Inspector<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permits Application Administrator<br>PSC Permit Technician |
| PSC View Public Sector Project Attachments | View public sector project attachments.                               | PSC System Administrator<br>PSC Registered Public User<br>PSC Principal Planner  |

| Primary Role  | Access Description   | Associated Job Roles and Abstract Roles  |
|---|--|--|
|   |  | PSC Planning Coordinator<br>PSC Plan Reviewer  |
| PSC Update Public Sector Project Attachments added by Others and Self | Update public sector project attachments added by others and themselves. | PSC System Administrator   |
| PSC Update Public Sector Project Attachments added by Self            | Update public sector project attachments added by themselves.            | PSC System Administrator<br>PSC Registered Public User<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer |
| PSC Delete Public Sector Project Attachments added by Others and Self | Delete public sector project attachments added by others and themselves. | PSC System Administrator   |
| PSC Delete Public Sector Project Attachments added by Self            | Delete public sector project attachments added by themselves.            | PSC System Administrator<br>PSC Registered Public User<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer |
| PSC Delete Public Sector Project Attachments added by Others and Self | Delete public sector project attachments added by others and themselves. | PSC System Administrator   |
| PSC Add Public Sector Project Attachments                             | Add public sector project attachments.                                   | PSC System Administrator<br>PSC Registered Public User<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer |

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 Projects

This topic discusses how to use the Public Sector Licensing and Permitting Projects.

A Project is a collection of various records from transactions, which include permits, planning applications, and pre-applications. It provides a summarized, consolidated view across project-related records.

Agency staff create and manage such inventory of projects comprising of various records and their attributes, and maintain detailed project information – all easily accessible from one location – the Projects page.

You use the Projects page to manage a complete list of projects with all the details, and perform various tasks.

This example illustrates the Projects page:

Projects

| Project                      | Summary   | Contact                                     | Status    | Start Date | End Date |
|------------------------------|---|---|-----------|------------|----------|
| Pro-2018-00522<br>AAA-2018   | AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the-art equipment, allowing new offices to just plug and play their systems.                                       | SIMMONS Robert<br>+1 (751) 852-9632         | Completed | 10-21-15   |          |
| Pro-2018-04462<br>Pro2469    | Connuire Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.          | Robert M. Jacob<br>+1 (751) 852-9562        | On Hold   | 10-04-17   | 11-20-19 |
| PROJ-OCT2018-4<br>John Tumac | Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops. | ALBERT MICHAEL SIMMONS<br>+1 (951) 852-9632 | Inactive  | 09-05-17   | 11-01-19 |

Page 1 of 3 (1-3 of 18 items) | 1 2 3 > X | Show Default

Use the project list on the Projects page to perform these tasks:


- Manage project activity
- Create new or update existing project details
- Assign or unassign transactions
- Add and maintain project attachments
- Visualize transactional data
- Add and maintain project contacts
- Access comprehensive project record details

You can access the Projects page by clicking the **Project List** tile on the Agency Springboard, or by clicking **Projects > Project List** in the navigation bar.

## Using the Projects Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, you can perform these actions:

| Page Elements | Description   |
|---------------|---|
| <b>Add</b>    | Click to add a new project, assign transactions, and create contacts.   |
| <b>Search</b> | Search by alphanumeric characters on the fields for projects in the list. The projects that meet the search criteria are displayed on the page. |

| Page Elements   | Description  |
|---|--|
| <b>Filter</b>   | Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.   |
| <b>Sort by</b>  | Select an option to sort the projects in the list by these fields: <ul style="list-style-type: none"> <li>○ Project</li> <li>○ Project Summary</li> <li>○ Contact</li> <li>○ Status</li> <li>○ Start Date</li> <li>○ End Date</li> </ul> |
|  | Click the <b>Details</b> button to access the details for the selected project.  |

## Adding a New Project

As an agency staff, you can create new projects to include transactions and contacts.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Add** button.
3. On the Project Details page, add values for the fields in the Projects section:

| Page Elements     | Description  |
|-------------------|--|
| <b>Project ID</b> | Displays the system generated project ID after you save the project.   |
| <b>Name</b>       | Enter the name of the project.   |
| <b>Summary</b>    | Enter a detailed description of the project.   |
| <b>Type</b>       | Select the type of project from the list of options.   |
| <b>Status</b>     | Select the status of the project: <ul style="list-style-type: none"> <li>○ Active</li> <li>○ Canceled</li> </ul> |



| Page Elements              | Description   |
|----------------------------|---|
|                            | <ul style="list-style-type: none"> <li>○ On Hold</li> <li>○ Inactive</li> <li>○ Completed</li> </ul>  |
| <b>Estimated Valuation</b> | Enter an estimated amount for the project.  |
| <b>Start Date</b>          | Enter the start date for the project.   |
| <b>End Date</b>            | Enter the end date of the project.  |
| <b>Primary Contact</b>     | <p>Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the <b>Search</b> option.</p> <p>Select the desired contact and use the <b>Select Contact Type</b> option to select the type of contact.</p> |

4. In the **Primary Address** section, click the prompt to open the Search Property page.
5. Use the Search box to filter the parcel, address, or owner values by keyword. Select the record you want by clicking the **Select** button. The Search Property page closes and the selected address appears on the Project Details page.
6. Click **Save** to save the new project and return to the Projects page. The new project record now appears in the projects list.

## Assigning Transactions to a Project

As an agency staff, you assign transactions to a project that you have created. You use the Assign page to assign transactions to your project. Transactions include permits, planning applications, and pre-applications.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record that you want to assign transactions to.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page, click the **Assign** button.
5. The Assign page opens with a list of all transactions available in the system. Use the **Search** option to search transactions by applicant, transaction ID, or by an address that is associated with the transaction.
6. The **Filter** allows you to refine your search results further using the transaction applicant's name and an address that is associated with the transaction..
7. Select the transactions using the check box available against each transaction record.
8. Click the **Assign** button to assign the selected transactions and return to the Transactions page, which lists the new transaction assignments.

**Note:** As a project manager, you can assign transactions to your project. The **Assign** page lists only those permits, planning applications, and pre-applications that were applied by you. The system ensures that project managers can assign only those transactions that were created by them. See the documentation on Security.

## Unassigning Transactions from a Project

As an agency staff, you can unassign transactions from a project that you have created. You use the Transactions page to unassign transactions from your project.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record from which you want to unassign transactions.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page click the **Edit** button, which enables you to select transaction records to unassign.
5. Use the check box available against each transaction record that you want to unassign and then click the **Unassign** button.

## Viewing and Updating Project Details

You view and manage projects comprising of transaction assignments, project attachments, and project contacts on the Project Details page.

The header displays the project code, project type description, and the project primary address. A map marker displays the primary location of the selected project on the map.

The left panel lists the various links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, and Contacts. Clicking each link opens the detail view on the right panel.

This example illustrates the Project Details page:

The screenshot shows the 'Project Details' page for a 'Residential Development Project' with ID 'Pro-2018-00520' at '2200 OTIS DR, ALAMEDA US-CA'. The 'Overview' section includes:

- Name:** Harbor Walk
- Summary:** Harbor Walk transformed an old dog pound into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitvale BART, an organic grocery and local cafes and coffee shops.
- Start Date:** 5/27/09
- End Date:** (empty)
- Status:** Active
- Primary Address:** 2200 OTIS DR, ALAMEDA US-CA
- Estimated Valuation:** USD
- Created By:** PSC\_SUPERUSER today

The 'Fees by Transaction' donut chart shows the following distribution:

| Transaction Code | Percentage |
|------------------|------------|
| CC-2018-00003    | 29.7%      |
| EZS-181005-00001 | 28.2%      |
| SP-181005-00004  | 22.7%      |
| PPG-00001-OCT05  | 19.4%      |

The left sidebar contains navigation links: Overview, Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, and Contacts. A 'Save' button is visible in the top right corner of the main content area.

## Using the Overview Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. The Overview page displays the information about the selected project in three sections – Overview, Primary Contact, and Fees and Payments.

4. The Overview section lists the basic information about the project. You can edit values for all the fields except for the **Project ID** and the **Created By** fields, which are system generated. The field descriptions are detailed under *Adding a New Project*.
  - o A graphical chart displays the top five transactions and their percentage fees distribution, calculated using the transaction total fees from all the assignments for the project. *Others* accounts to the fees from the rest of the transactions assigned to the project.
  - o The Primary Contact section displays the details of the contact that was entered at the time of creating the project. You cannot edit the values for these fields on this page.

**Note:** You can change the primary contact from the Contacts page.

  - o The Fees and Payments section displays:

| Page Elements        | Description  |
|----------------------|--|
| <b>Total Fees</b>    | The sum of all the fee values from all the transactions assigned to the project.   |
| <b>Total Payable</b> | The sum of the payable amounts from all the transactions assigned to the project.  |
| <b>Total Paid</b>    | The sum of the amounts paid for all the transactions assigned to the project.  |
| <b>Balance Due</b>   | The sum of the amounts that is due for all the transactions assigned to the project.<br><br><p><b>Note:</b><br/>Balance amount is the difference between the total payable amount and the total paid amount.</p> |


The fields in this section are displayed if there is at least one assignment (permit, planning application, or pre-application) for the project. You cannot edit the values for these fields on this page.

5. Click **Save** to save your changes, if any.

## Using the Transactions Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Transactions** on the left panel to access the list of transactions that are assigned to the project. The Transactions page provides these details:


| Page Elements | Description  |
|---------------|--|
| <b>Edit</b>   | Click to enable the selection of transactions for removing them from the project. See <b>Unassigning Transactions from a Project</b> under <i>Adding a New Project</i> . |

| Page Elements   | Description  |
|---|--|
| <b>Assign</b>   | Click to open the Assign page and select transactions to assign to the project.<br><br>See <b>Assigning Transactions</b> under <i>Adding a New Project</i> .   |
| <b>Filter</b>   | Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.       |
| <b>Sort</b>   | Sort the list of transactions by: <ul style="list-style-type: none"> <li>○ Date</li> <li>○ Transaction ID</li> <li>○ Status</li> </ul>   |
| <b>Alert icon</b>   | Identify transactions with a status affected by a condition or if they are pending submit.   |
| <b>Transaction</b>  | Displays the name and description of the transaction.  |
| <b>Status</b>   | Displays the status of the transaction.  |
| <b>Created By</b>   | Displays the name of the user who created the transaction, with the date and time of creation.   |
| <b>Applicant</b>  | Displays the name, email ID, and contact number of the applicant associated to the transaction.  |
| <b>Property</b>   | Displays the address of the property for which the transaction is applied.   |
| <b>Fees</b>   | Displays the total fees paid and the balance due, if any.  |
|  | Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See <i>Navigating to Planning Application Details</i> . |

## Using the Inspections Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.


- Click Inspections on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

| Page Elements  | Description  |
|--|--|
| <b>Permit</b>  | Displays the permit ID.  |
| <b>Inspection</b>  | Displays the inspection ID.  |
| <b>Status</b>  | Displays the schedule status of the inspection, for example, Scheduled, Requested, Completed, and Canceled.  |
| <b>Inspector</b>   | Displays the inspector assigned to the inspection.   |
| <b>Property</b>  | Displays the property associated with the inspection.  |
| <b>Result</b>  | Displays the result of the inspection, Pass or Fail.   |
|  | Click to access the Inspection Detail page and review the details of the inspection assigned the project. All sections on this page are display-only. See <a href="#">Reviewing Inspection Details</a> . |

## Using the Fees and Payments Page

- Select the **Project List** tile on the Agency Springboard.
- On the Projects page, select the **Details** button for a project in the grid. Click Fees and Payments on the left panel to access the details of the fees and payments associated with a submitted transaction. The Fees and Payments page provides these details:

| Page Elements        | Description   |
|----------------------|---|
| <b>Total Fees</b>    | Displays the total amount of fees that may be applicable to the transaction.  |
| <b>Total Payable</b> | Displays the amount of fees that is designated as payable. Fees that are not payable include fees on hole, for example. |
| <b>Total paid</b>    | Displays the amount of the total fees already collected.  |
| <b>Balance Due</b>   | Displays the remaining portion of the fees yet to be collected.   |
| <b>Transaction</b>   | Displays the transaction ID.  |

| Page Elements   | Description  |
|---|--|
|   |  |
| <b>Fee Description</b>  | Displays the description of the fee item as defined when creating a fee item.                          |
| <b>Amount</b>   | Displays the amount due for each fee item.   |
| <b>Currency</b>   | Displays the currency in which the transaction will be paid.   |
| <b>Status</b>   | Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due. |
| <b>Assessed Date</b>  | Displays the date the request for payment was issued.  |
| <b>Payment Date</b>   | Displays the date payment was received.  |
| <b>Payment Reference</b>  | Displays the payment reference issued for the transaction.   |
| <b>Invoice</b>  | Displays the invoice number of the agency associated with the permit transaction application.          |
|  | Click to access the Fee Item Details page and review the details of the fees.                          |

## Using the Attachments Page

Attachments provide supporting documentation needed by users while managing projects. You view a list of files and upload or download documents associated with your project on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Attachments** on the left panel to access the attachments associated with the project. The Attachments page provides these details:

| Page Elements    | Description   |
|------------------|---|
| <b>File Name</b> | View the following information in the Filename field: <ul style="list-style-type: none"> <li>○ Filename with file type extension</li> <li>○ File Size</li> <li>○ Uploaded By user name</li> </ul> |

| Page Elements                | Description  |
|------------------------------|--|
|                              | <ul style="list-style-type: none"> <li>○ Uploaded On date</li> </ul>   |
| <b>Description</b>           | View the description of the attachment as entered by the user who added the attachment.  |
| <b>Category/ Subcategory</b> | <p>View the document category and subcategory for the attachment.</p> <p>This field appears only if a document group is set up on the Project Type Details page while setting up the project type.</p> <p>See <i>Setting Up Project Types</i>.</p> |
| <b>Actions</b>               | <p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> <li>○ View Details</li> <li>○ Download</li> <li>○ Delete</li> </ul>  |

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

## Adding Project Attachments

You upload files to the Attachments page using the Add Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Add** icon.
5. Select the file to upload in the browser dialog box and click **Open**. The filename appears on the Add Attachments page.
6. On the Add Attachments page, you can enter a description of the file, a document category, and a document subcategory, if desired.
7. Use the look-up prompt to select a document category and subcategory that have been defined by the agency. For more information, see *Setting Up Document Categories and Subcategories*.
8. Click the **Upload** button.

## Downloading Project Attachments

You download a document on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. In the attachments grid, click the **Action** icon for the document you want to download.
5. Select **Download** and save to the location of your choice.

## Deleting Project Attachments

You can use this method for deleting one or more documents.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Edit** icon above the grid.
5. Select one or more documents to delete.
6. Click the **Delete** icon.
7. To delete a single document, access the Attachments page, and select **Delete** in the Action menu for the document you want to delete.

## Using the Data Visualization Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Data Visualization** on the left panel to access graphical charts that display the comparative data related to transactions within the selected project. These graphical charts are organized in three separate tabs, with a grid each displaying a list of all the transactions within the project:
  - **Fees by Transaction Type:** The chart displays all the project transactions represented as bars – each bar grouping transactions by the transaction type, along with the total amount of fees applicable. Click a bar to list all the transactions for that transaction type with their details at the bottom of the page.
  - **Fee Details:** The chart displays all the project transactions represented as bars. Each transaction is displayed as a combination of two bars – one bar reads the total amount of all applicable fees and the other reads the total amount of all fees paid. Click a bar to list all the transactional fee item details at the bottom of the page.
  - **Inspection Status:** The pie chart displays the inspection status of each of the permits assigned to the project. Click a section of the chart to view the details of the inspections pertaining to the permits at the bottom of the page.

## Using the Contacts Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Contacts** on the left panel to access the list of contacts that are added to the project. You will see the primary contact that was added at the time of creating the project.
4. Click the **Details** button for the contact record to open the Contact Details page. You can view the contact details and edit certain fields.

**Note:** You cannot delete a primary contact or turn off the **Primary Flag** option. Only agency staff such as an administrator can select from the registered profiles to assign a primary contact. Such an assignment will automatically update the earlier primary contact as not primary.

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:
  - *Add a contact from registered contacts:* You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.



As a user, you cannot make primary contact assignments for your project. Only agency staff such as an administrator can assign a primary contact from the registered profiles.

The primary contact that was selected at the time of creating the project will longer be a primary contact.

- *Add a brand new contact manually:* You create a new contact by entering all the contact details and then include in the transaction.

Again, as a user, you cannot make primary contact assignments for your project.

#### *Related Topics*

- [Applying Conditions to Applications](#)



# 9 Tracking Planning Application Activities

## Security Details for Tracking Planning Application Activities

This topic describes important security roles, requirements, or considerations specific to tracking planning application activities.

| Primary Role                                    | Access Description   | Associated Job Roles and Abstract Roles                                  |
|---|--|--|
| PSC Agency Planning and Zoning Inquiry          | View activity logs for all planning applications.              | PSC Agency Staff - All agency users                                      |
| PSC Planning and Zoning Activity Management     | Act and comment on planning activities assigned to themselves. | PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner |
| PSC Planning and Zoning Activity Administration | Update and comment on all planning activities.                 | PSC System Administrator<br>PSC Zoning 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 Activity Tracking for Planning Applications

As planning department staff, you use activity tracking to help work through a list of time-sensitive tasks that affect the progress of a planning application.

The activities are driven by local ordinance, state law, and an agency’s internal process, and the activity tracking provides a way to monitor the application. Taken together, the activities form a to-do list of tasks with calculated due dates and the flexibility to make updates when needed. Activities are displayed on the Activity Tracking page in the planning application details. You can also view activities on the Planner Worklist. For more information about using the worklist, see [Using the Planner Worklist](#).

The activities for a planning application are configured by your agency based on events or dates in the application timeline, including when the application is submitted, when the application is accepted, the hearing date, and the hearing decision date. The activities show up in the activity tracking for the planning application when one of the key

events or dates occurs. For more information about configuring activities, see *Defining Planning Application Activity Rules*.

Before you can use activity tracking, the agency sets up a list of activities and maps the group to a planning application type. Whenever you create an application with that planning application type, the associated activity list is used.

The activity due dates can occur prior to or after an event. For example, when the planner schedules a hearing, the activities associated with the hearing date appear in the activity tracking list. You'll see automatically generated due dates based on the activity rules set up by your agency and ensure that all of the deliverables are complete before or after the hearing.

## Viewing the Activity Tracking Page

For each activity, the following information appears in the tracking list. Navigate to the Activity Tracking page by accessing the planning application, then select **Activity Tracking** under the **Planning Application** menu in the left panel on the page. The activity tracking tab is only available if the planning application is associated with an activity group.

| Page Element             | Description  |
|--------------------------|--|
| <b>Activity</b>          | Displays the name of the activity or task. This field is read-only and can't be updated.<br><br>If the task is overdue, you'll see an overdue notice.  |
| <b>Base Date</b>         | Displays one of four milestone dates triggered by an event. The base date is the reference date for calculating the activity due date. <ul style="list-style-type: none"> <li>Received date - The application was received by agency staff. The activity appears on the tracking page when the application is submitted in the system or the received date is updated, depending on the activity rule.</li> <li>Acceptance date - The agency staff accepts the application in their worklist. This date is automatically updated through workflow.</li> <li>Hearing date - The agency staff schedules or reschedules a public hearing for the planning application.</li> <li>Hearing Decision date - The hearing body makes a decision and agency staff enters the decision in the system.</li> </ul> When these events occur, the activity is added to the tracking list.<br><br>These dates can change and the due dates may be recalculated depending on the activity rules and the status of the activity. |
| <b>Due Date</b>          | Displays the date the activity or task is due. This date is calculated using the base date and the activity rule for number of days due before or after the base date. This field can be manually updated.   |
| <b>Status</b>            | Displays the status of the activity or task. This field can be manually updated  |
| <b>Show All Statuses</b> | Turn on the <b>Show All Statuses</b> switch to view a complete list of activities in the tracking table.<br><br>The default view shows activities with an in progress or pending status. When you opt to show all statuses, you'll see history with other statuses, including complete or canceled activities.   |
| <b>Last Updated</b>      | Displays the date when the due date or status was last updated. This field can be manually updated.  |

| Page Element      | Description  |
|-------------------|--|
|                   |  |
| <b>Updated By</b> | Displays the name of the user who last updated the due date or status. This field is automatically updated.  |
| <b>Comments</b>   | Click the <b>Comments</b> icon to view and add internal notes for each activity. The number of comments appears on the icon.<br><br>The comments also show up on planning application items in the agency staff activity worklist.   |
| <b>Actions</b>    | Displays <i>Resubmit</i> when the activity with a Submission Date base date has an incomplete status. Agency staff can then create a new activity with a resubmitted date. This action appears only when the <b>Allow Resubmission</b> option is selected in the activity rules. |

#### Related Topics

- [Setting Up Activity Tracking](#)
- [Working with Planning Application Activities](#)

## Working with Planning Application Activities

Activity tracking helps you effectively manage important due dates for deliverables due during the planning application process. You can monitor activities when due dates are updated automatically and make manual updates to due dates and statuses to ensure the application progresses as required.

In some cases, activity due dates are updated automatically, such as when a received date is updated or a public hearing is rescheduled. As you work through the tracking list, you can also manually update the due date and the status of activities, and enter the date of the update. In general, you can't add activities, however depending on the setup, you can create a new activity for a resubmitted application. If an application is canceled or withdrawn, all activities are canceled.

### Viewing Automatically Updated Activities

The system automatically updates activity due dates depending on the type of base date, the current activity status, and the activity rules configured by the agency. This section provides details about the automatic updates that occur after different actions are taken, such as updating the received date for an application or rescheduling a public hearing.

Agency staff enter the date an application was received while filling out the intake form on behalf of an applicant. The activity based on the Received Date appears in the tracking table upon application submission. When agency staff updates the Received Date on the application details Overview page, the activity due date is automatically recalculated based on the new received date. However, the due date is recalculated only when the option to **Allow Resubmission** is set up for the activity.

Activities based on the hearing date appear in the tracking table when the hearing is scheduled. The agency can set up the activity rules to create a new activity or update an existing one when the public hearing is rescheduled or the hearing body is changed. The rule is active when the switch to **Redo Activity with New Base Date** is turned on. The system determines the updates based on the redo activity setting, the action, and the activity status.

The table here shows the automatic activity updates for different actions when the base date is the public hearing date.

| Action                   | Current Activity Status               | Redo Activity Setting | Automatic Tracking Update  |
|--------------------------|---------------------------------------|-----------------------|--|
| Hearing is rescheduled.  | Pending, In Progress, or Not Required | On                    | Recalculates the due date for the current activity based on the new hearing date and resets the status to Pending.                         |
| Hearing is rescheduled.  | Pending, In Progress, or Not Required | Off                   | The due date stays as-is.  |
| Hearing is rescheduled.  | Completed                             | On                    | Creates a new activity with a new base date and due date. Sets the status to Pending. The completed activity stays as is.                  |
| Hearing is rescheduled.  | Canceled                              | N/A                   | No changes are made to the base date or due date. The canceled activity stays as-is.   |
| Hearing body is changed. | Any                                   | N/A                   | Deletes all current activities with the old hearing body and creates all new activities with new hearing body. Sets the status to Pending. |
| Hearing is canceled.     | Any except for Canceled               | N/A                   | Cancels all activities.  |

## Manually Updating Due Dates and Statuses

Although you can't manually delete or modify system-added activities and their base dates, you can manually update the activity due date, activity status, and the date the activity was last updated. If an activity isn't required, you can update the status to Not Required or Canceled.

Let's take a look at how to update these activity attributes for a planning application.

1. Go to the planning application.
2. Select **Planning Application** then **Activity Tracking** in the left navigation panel.
3. On the Activity Tracking list page, select the row of the activity you want to update.
4. You can update these fields:

| Page Element           | Description  |
|------------------------|--|
| <b>Due Date</b>        | Enter the date that the deliverable is due or the deadline for the action that should be taken.                      |
| <b>Activity Status</b> | Select a status from the drop-down list. Your agency may provide statuses in addition to the statuses in the system. |

| Page Element | Description                                   |
|--------------|---|
| Last Updated | Enter the date when you updated the activity. |

5. Click **Save**.

## Repeating an Activity for a Resubmitted Application

The Received Date activity that appears when the application is submitted can be repeated when the application is resubmitted. The **Allow Resubmission** switch must be turned on in the activity rule. Here's how to reset the activity due date with a pending status if the application is resubmitted.

1. On the Activity Tracking page, select the row of the activity based on the submission date.
2. Change the status to *Incomplete*. This status is only available if the **Allow Resubmission** switch is turned on in the activity setup.
3. Click **Save**.
4. Click the **Resubmit** link, which is only available when the status is *Incomplete*.
5. On the Resubmit page, the **Resubmitted Date** is automatically populated with the current date, and the **New Due Date** is calculated using the existing activity rule. You can change the **Resubmitted Date** and the due date will be recalculated. You can also override the due date.
6. Click **Save**.

The activity status resets to *Pending*.





# 10 Managing Property Information

## Security Details for Managing Property Information

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

| Primary Role                   | Access Description                        | Associated Job Roles and Abstract Roles          |
|--------------------------------|---|--|
| PSC Manage Parcel Transactions | Manage public sector parcel transactions. | PSC System Administrator<br>PSC Business Analyst |

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 Transactions Associated with a Parcel

View summary information of all transactions associated with a parcel.

Agency staff can view a summary of transactions for Permits, Planning Applications, Business Licenses, Cases and Incidents, that are associated with a parcel.

You can navigate to the Transactions page, from the **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to view its transactions.

**Note:** A condition icon is displayed on the parcel row if a parcel has a condition applied to it. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the Parcel Conditions page in a new window.

On the Parcel page for the selected parcel, select the Transactions tab in the left panel. On the Transactions page, click the transaction tab you wish to view for the parcel.

| Page Element                      | Description   | Additional Information                |
|-----------------------------------|---|---------------------------------------|
| Permits and Planning Applications | View application data and statuses for permits and planning applications using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here. | <a href="#">Managing Transactions</a> |

| Page Element             | Description  | Additional Information                            |
|--------------------------|--|---|
| <b>Business Licenses</b> | View summary information about specific activities related to a business licenses such as consultations and license origination. | <i>Managing Business License Transactions</i>     |
| <b>Cases</b>             | Agency staff can view a summary of cases that are associated with a parcel on the Transactions page, Cases tab.                  | <i>Viewing Cases Associated with a Parcel</i>     |
| <b>Incidents</b>         | Agency staff can view a summary of incidents that are associated with a parcel on the Transactions page, Incidents tab.          | <i>Viewing Incidents Associated with a Parcel</i> |

## Viewing Cases Associated with a Parcel

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

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its transactions.
3. On the Parcel page for the chosen parcel, select the Transactions tab in the left panel.
4. On the Transactions page, click the Cases tab.
5. Here are some of the information on the case transactions page for a parcel.

| Page Element             | Description   |
|--------------------------|---|
| <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, Compliance, Violation, Citation, and so on.   |
| <b>Comply By</b>         | Displays the last date to ensure compliance.  |

## Viewing Incidents Associated with a Parcel

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

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its transactions.
3. On the Parcel page for the chosen parcel, select the Transactions tab in the left panel.
4. On the Transactions page, click the Incidents tab.
5. Here are some of the information on the incident transactions page for a parcel.

| Page Element       | Description   |
|--------------------|---|
| <b>Issue ID</b>    | This column displays: <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 Reported.</li> <li>○ The date on which the incident was reported.</li> </ul> |
| <b>Location</b>    | Displays the incident address and the incident's district type and district.<br><br>If district information is missing, a warning icon appears in its place.  |
| <b>Description</b> | Displays the incident description.  |
| <b>Assigned</b>    | Displays the name of the technician or code officer to whom the incident is assigned.   |

## Working with Property Attachments

Attachments provide supporting documentation needed by agency staff to manage parcels. You view a list of files and upload or download documents on the Attachments page.

### Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
  - Note:** You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.

- On the Attachments page, view the list of property attachments, including this information:

| Page Element                    | Description  |
|---------------------------------|--|
| <b>Filename and Description</b> | View the filename and description entered by the user upon upload.   |
| <b>File Size</b>                | View the size of the attachment.   |
| <b>Category and Subcategory</b> | View the document category and subcategory for the attachment.   |
| <b>Actions</b>                  | <p>Click to select an action:</p> <ul style="list-style-type: none"> <li>○ <i>View Details</i>: Select to view detailed information about the attachment.</li> <li>○ <i>Download</i>: Select to download the attachment.</li> <li>○ <i>Delete</i>: Select to delete the attachment. You will be prompted to confirm the permanent deletion.</li> </ul> |

## Adding Property Attachments

- Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
    - Note:** You can also access these pages through the Property Information menu in the Navigator.
  - Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
  - Click **Attachments** in the navigation bar.
  - Click **Add**.
  - Select the file to upload in the browser dialog box and click **Open**.  
The filename appears on the Add Attachments page.
  - On the Add Attachments page, enter a description of the file, a document category, and a document subcategory.
    - Note:** The description, document category, and document subcategory fields are optional and can be left blank.
- For more information on document categories and subcategories, see [Setting Up Document Categories and Subcategories](#).
- Click the **Upload** button.

## Deleting Property Attachments

- Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
  - Note:** You can also access these pages through the Property Information menu in the Navigator.
- Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
- Click **Attachments** in the navigation bar.
- Click **Edit**.

5. Select the check boxes next to all the attachments that you want to delete.
6. Click **Delete**. You will be prompted to confirm the permanent deletion.

**Note:** You can delete a single attachment on the Attachments page by selecting **Delete** in the **Actions** menu.

## Applying Conditions to Parcels and Addresses

Agency staff can apply conditions to parcels and addresses so that users interacting with a property are notified of any issues with it.




Agency staff apply, modify, and resolve parcel and address conditions on the Conditions page. The Conditions page lists all of the conditions applied to the selected property, with applied conditions followed by resolved conditions. The condition indicator in the header of the details pages displays the most severe condition having a high priority. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.

**Note:** Deleting a parcel or address record in the property information automatically deletes any associated conditions that are applied to the permit or planning application you are working with. See the section *Deleting a Property* under *Working with Property Information*.

### Applying a Condition to a Parcel or Address

1. Click **Parcel** or **Property Address** on the agency springboard.  
Select a property.  
Click **Conditions** in the left panel.
2. Click **Apply Condition**.
3. On the Condition Details page, enter values for the following fields:

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

| Page Element  | Description   |
|---|---|
|  Lock  Hold<br><br> Notice | <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>  |
| <b>Apply Condition to Transactions</b>  | <p>Applies the condition to new transactions that will be associated with the selected address or parcel. You turn off the switch if you want the condition to be applied only to the transaction you're working with.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p> <p>For more information on setup and condition rules, see <a href="#">Setting Up Conditions</a>.</p>   |
| <b>Include in-process transactions</b>  | <p>Turn on this switch if you want to apply the condition to the in-process transactions related to the parcel or address.</p> <p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> link to view the list of transactions where the condition will be applied.</p>   |
| <b>Condition Rules</b>  | <p>Select one or more rules from:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>Condition rules are available for selection based on:</p> <ul style="list-style-type: none"> <li>○ <i>Condition setup</i>: If the <b>Apply Condition to Transactions</b> switch is turned off, then only the <b>Prevent Application Progress</b> rule is available for selection.</li> <li>○ <i>Condition severity</i>: For a condition with a Hold severity, you can accept the default rules or select different rules. For a condition with a Lock severity, all condition rules are automatically applied and can't be changed.</li> </ul> <p>See <a href="#">Setting Up Conditions</a>.</p> |
| <b>Priority</b>   | <p>Select a priority for the condition. Values are <i>High</i>, <i>Medium</i>, and <i>Low</i>.</p>  |

| Page Element           | Description   |
|------------------------|---|
| Description            | Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.              |
| Additional Information | Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here. |

4. Click **Save**.

## Resolving a Condition

You can resolve a condition that you applied to a parcel or address.

1. Click **Parcel** or **Property Address** on the agency springboard.  
Select a property.  
Click **Conditions** in the left panel.
2. Click **Resolve** for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created. You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.
4. Use the **View Impacted Transactions** link to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
5. Click **Save**.

## Modifying a Condition

You can modify a condition that you applied to a parcel or property address. Any changes you make won't be copied over to the related transaction condition.

1. Click **Parcel** or **Property Address** on the Agency Springboard.  
Select a property.  
Click **Conditions** in the navigation bar.
2. Click the **View More Details** button for the condition you want to modify.
3. On the Condition Details page you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

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

4. Click **Save**.  
**CAUTION:** Once a condition is saved, you can't make changes to the **Apply Condition to Transactions** and **Include in-process transactions** fields.

## Viewing a Resolved Condition

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

1. Click **Parcel** or **Property Address** on the Agency Springboard.
2. Select a property.
3. Click **Conditions** in the navigation bar.
4. Select a row with a status of **Resolved** and click **View More Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
  - o Resolve condition applied to transactions
  - o Resolution Action
  - o Resolved By
  - o Resolved Date
6. Click **Cancel** to return to the Conditions page.

### Related Topics

- [Working with Conditions](#)

## Working with Parcel Genealogy Transactions

Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management.

Agency staff can create Parcel Genealogy transactions to manage parcel splits, merges and lot line adjustments. You can use the step-by-step guide to select a genealogy transaction type and establish parent and child parcels. You can also manage attributes, such as addresses, owners, size and districts. Once a parcel genealogy transaction is established, you can view the relationship in the Genealogy tab within the Parcel page.

## Splitting Parcels

To split parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Split** and then click **Add Transaction**.
3. On the Split page, you have a guided process with steps as follows:

| Steps                         | Description   |
|-------------------------------|---|
| Step 1: Select Parent Parcels | You can select parcels from the list, which have to be split.                                   |
| Step 2: Select Child Parcels  | You can either select child parcels that are already on the system or create new child parcels. |



| Steps  | Description   |
|--|---|
| Step 3: Manage Addresses<br>Step 4: Manage Owners<br>Step 5: Manage Districts<br>Step 6: Manage Conditions<br>Step 7: Manage Parcel Size | When you create new child parcels, you can enter the parcel attributes such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them. |
| Step 8: Review   | You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.   |

## Merging Parcels

To merge parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Merge** and then click **Add Transaction**.
3. On the Merge page, you have a guided process with steps as follows:

| Steps  | Description  |
|--|--|
| Step 1: Select Parent Parcels  | You can select the parent parcels to be merged from the list.  |
| Step 2: Select Child Parcels   | You can either select child parcels that are already on the system or create new child parcels.  |
| Step 3: Manage Addresses<br>Step 4: Manage Owners<br>Step 5: Manage Districts<br>Step 6: Manage Conditions<br>Step 7: Manage Parcel Size | When you create new child parcels, you can enter the parcel attributes, such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them. |
| Step 8: Review   | You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.  |

4. Click **Submit**.

## Making Lot Line Adjustments

To make lot line adjustments:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Adjust** and then click **Add Transaction**.
3. On the Adjust page, you have a guided process with steps as follows:

| Steps                      | Description  |
|----------------------------|--|
| Step 1: Select Parcels     | You can select parcels from the list to make adjustments.  |
| Step 2: Manage Parcel Size | Adjust the parcel sizes.   |
| Step 3: Review             | You can review the details of the adjustment made. Validation errors, if any, are displayed at the top of this page. |

4. Click Submit.

## Viewing Parcel Genealogy Transactions

To view parcel genealogy transactions:

1. Select the Parcel tile on the Agency Springboard.
2. From the Parcel page, click a parcel row.
3. Select the Genealogy tab in the left panel. You can view the details of all the genealogy transactions this parcel has been through. The red star identifies the parcel which is currently being viewed. Click any parent or child parcel link to open the corresponding Parcel Details page in a new window.

## Reconciling Provisional Parcels

Agency staff can now easily reconcile provisional parcels by replacing the temporary parcel identification numbers with a new one. Once reconciled, a cross-reference is established to retain history.

New parcels with the provisional status can be created on the Parcel page or as a result of genealogy transactions. The agency uses the provisional parcel numbers to associate transactions to those parcels while waiting for the assessor's parcel numbers (APNs) from the county. Once APNs are imported, agency staff can search for matched or unmatched parcels in the provisional status and reconcile them with their matching APNs. After the provisional parcels are reconciled, a cross-reference is established to retain history.

**Note:** The batch process to match provisional parcels should be run prior to performing parcel reconciliation to ensure all provisional parcels have been matched to their associated imported APNs. The BI Catalog report, Transactions with Reconciled Provisional Parcels, lists the transactions that refer to the reconciled provisional parcels. Using this report you can see the provisional parcels that have been replaced with final parcels as a result of parcel reconciliation. For more information, see *Public Sector Compliance and Regulation Analytics*.

To reconcile matched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, select the Matched Parcels tab, to view the following fields:

| Page Element                    | Description   |
|---------------------------------|---|
| <b>Parcel</b>                   | Lists the provisional parcels with any potential matching APNs. Matching APNs are parcels with the same street number and street name.  |
| <b>Status</b>                   | The status of the parcel. The value can be Active, Retired or Provisional.  |
| <b>Address</b>                  | The primary address of the parcel.  |
| <b>City</b>                     | The city of the primary parcel address.   |
| <b>Owner</b>                    | The name of the primary parcel owner.   |
| <b>Map Book</b>                 | The recorded map book for the parcel.   |
| <b>Page</b>                     | The recorded map book page for the parcel.  |
| <b>Reconcile Parcels</b> button | Select the provisional parcel and the matching APN, and then click the <b>Reconcile</b> button to match the provisional parcel with the matching APN and retire the provisional parcel. |

3. Click the **Find Matching Parcel** button on a parcel row to open the **Find Matching Parcel** modal which lists a matching APN.
4. In the Find Matching Parcel modal, view the following fields:

| Page Element   | Description  |
|----------------|--|
| <b>Search</b>  | By default, the search field shows the street number and street name of the primary address of the matched provisional parcel. The search results below appear filtered to list only those matching the search criteria. |
| <b>Parcel</b>  | The APNs of the parcels that resulted from the search.   |
| <b>Status</b>  | The status of the parcel. The value can be Active, Retired or Provisional.   |
| <b>Address</b> | The primary address of the parcel.   |

| Page Element    | Description  |
|-----------------|--|
| <b>Owner</b>    | The name of the primary owner of the parcel.   |
| <b>Map Book</b> | The recorded map book for the parcel.  |
| <b>Page</b>     | The recorded map book page for the parcel.   |
| <b>Lot</b>      | The lot number of the parcel in the Detail Land Information, which is part of the APN. |

5. Select the check box for the matching APN and click the **Reconcile** button.

After reconciliation, the provisional and matched APNs move to the Reconciliation History tab, from where you can see the history of the reconciled parcels.

To reconcile unmatched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, click the Unmatched Parcels tab, to view the following fields:

| Page Element              | Description  |
|---------------------------|--|
| <b>Search</b>             | You can search for a provisional parcel using its primary address.   |
| <b>Provisional Number</b> | The temporary parcel number assigned to newly created provisional parcels. Click the link to view the details of the parcel in a new window. |
| <b>Creation Date</b>      | The date on which the provisional parcel was created.  |
| <b>Status</b>             | The status of the parcel. The value can be Active, Retired or Provisional.   |
| <b>Address</b>            | The primary address of the parcel.   |
| <b>Owner</b>              | The name of the primary parcel owner.  |
| <b>Map Book</b>           | The recorded map book for the parcel.  |
| <b>Page</b>               | The recorded map book page for the parcel.   |
| <b>Lot</b>                | The lot number of the parcel in the Detail Land Information, which is part of the APN.   |

3. Click the **Find Matching Parcel** button on an unmatched parcel row to search for a matching APN.
4. In the Find Matching Parcel modal, view the following fields:

| Page Element    | Description  |
|-----------------|--|
| <b>Search</b>   | By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appear filtered to list only those matching the search criteria. |
| <b>Parcel</b>   | The APNs of the parcels that resulted from the search.   |
| <b>Status</b>   | The status of the parcel. The value can be Active, Retired or Provisional.   |
| <b>Address</b>  | The primary address of the parcel.   |
| <b>Owner</b>    | The name of the primary owner of the parcel.   |
| <b>Map Book</b> | The recorded map book for the parcel.  |
| <b>Page</b>     | The recorded map book page for the parcel.   |
| <b>Lot</b>      | The lot number of the parcel in the Detail Land Information, which is part of the APN.   |

5. Select the check box for the matching APN and click the **Reconcile** button.

## Viewing Reconciliation History

In the Reconciliation History page, you can view the details of the provisional parcels reconciled with their APNs. You can also use this page to undo a reconciliation.

To view reconciliation history:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. Click the Reconciliation History tab to view the following fields:

| Page Element              | Description   |
|---------------------------|---|
| <b>Search</b>             | By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appears filtered to list only those matching the search criteria. |
| <b>Provisional Number</b> | View the provisional number of the parcel. Click the link to view the details of the parcel in a new window.  |

| Page Element                      | Description   |
|-----------------------------------|---|
| <b>APN</b>                        | View the APN of the parcel. Click the link to view the details of the parcel in a new window. |
| <b>Address</b>                    | The primary address of the parcel.  |
| <b>Owner</b>                      | The name of the primary owner of the parcel.  |
| <b>Map Book</b>                   | The recorded map book for the parcel.   |
| <b>Page</b>                       | The recorded map book page for the parcel.  |
| <b>Lot</b>                        | The lot number of the parcel in the Detail Land Information, which is part of the APN.        |
| <b>Reconciled By</b>              | The user id of the person who reconciled the parcels.   |
| <b>Date Reconciled</b>            | The date on which the provisional parcel was reconciled with its APN.                         |
| <b>Undo Reconciliation</b> button | To disassociate parcels which were incorrectly reconciled.                                    |

## Undoing a Reconciliation

To undo a reconciliation:

1. Select Parcel Reconciliation on the Agency Springboard.
2. Click the **Reconciliation History** tab.
3. Click the **Undo Reconciliation** button and confirm to revert the reconciliation.

# 11 Managing Contractor Information

## Security Details for Managing Contractor Information

This topic describes important security roles, requirements, or considerations specific to managing contractor information for permits and planning applications.

| Primary Role                                | Access Description   | Associated Job Roles and Abstract Roles   |
|---|--|---|
| PSC Registered Public User                  | Manage contractors in permits for which an applicant or a contact has access until the permit is closed. | PSC Registered Public User  |
| PSC Agency Permits Inquiry                  | View contractor information on permit applications.  | PSC Agency Staff - All Agency users   |
| PSC Permit Contractor Management            | Add and update contractor information on permit applications until they are closed.                      | PSC Business Analyst<br>PSC System Administrator<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC System Administrator<br>PSC Permit Technician |
| PSC Permits Management with Elevated Access | Delete sections of contractor information on permit applications.  | PSC Permits Supervisor<br>PSC System Administrator  |
| PSC System Administrator                    | Manage contractor information on permits at all times.   | PSC System Administrator  |

| Primary Role                           | Access Description   | Associated Job Roles and Abstract Roles |
|--|--|---|
| PSC Registered Public User             | Manage contractors in planning applications for which an applicant or a contact has access until the planning application is closed. | PSC Registered Public User              |
| PSC Agency Planning and Zoning Inquiry | View contractor information on planning applications.  | PSC Agency Staff - All Agency users     |

| Primary Role   | Access Description  | Associated Job Roles and Abstract Roles  |
|--|---|--|
| PSC Planning and Zoning Contractor Management            | Add and update contractor information on planning applications until they are closed. | PSC System Administrator<br>PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Business Analyst<br>PSC Principal Planner |
| PSC Planning Application Management with Elevated Access | Delete sections of contractor information on planning applications                    | PSC Zoning Administrator<br>PSC System Administrator   |
| PSC System Administrator                                 | Manage Contractor information on planning applications at all times                   | PSC System Administrator   |

| Primary Role                         | Access Description                  | Associated Job Roles and Abstract Roles   |
|--------------------------------------|-------------------------------------|---|
| PSC Contractor Master Administration | Administer main contractor records. | PSC System Administrator  |
| PSC Contractor Master Management     | Manage main contractor data.        | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Inspections Supervisor<br>PSC Economic Development Officer<br>PSC Chief Building Officer<br>PSC Cashier<br>PSC Business Analyst<br>PSC Building Inspector<br>PSC Principal Planner<br>PSC Planning Coordinator<br>PSC Plan Reviewer<br>PSC Permits Supervisor<br>PSC Permit 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*.

## Contractor License Overview

Permit and planning applications can include information about the contractors who perform the work. Agency contractor records help you manage contractors used in the system to ensure licenses are active and in good standing.

### Contractor License Information

Contractor information is stored and maintained in the agency's contractor records, where agency staff manually adds or loads licenses from an external source. Additionally, when agencies don't limit license selection to their list of contractor records and also integrate with an external licensing body, applicants can supply contractor information in permit and planning applications. If an application includes a license number that doesn't yet exist in your main records, submitting the application creates a new contractor record.

If you implement contractor integration, you can validate license information against your state or other external licensing body using the integration capabilities of Oracle Integration Cloud (OIC).

Regardless of whether you integrate with an external licensing body, your contractor records include the same type of information. However, integration affects how you view and manage certain information. The following table describes how you manage information using only contractor records maintained by the agency or using an integration to validate and add licenses to your contractor records.

| Information Type | Contractor List Only  | Contractor List and External Source   |
|------------------|---|---|
| All              | <p><b>Note:</b><br/>The agency limits the contractor selection to the agency-maintained contractor list.</p> <p>The agency allows applicants to select contractor licenses from the agency-maintained contractor records list only. In this case, applicants can search for and select licenses from the contractor records only and not from the external licensing body.</p> <p>Agency staff with appropriate permissions manually enter or update license information in the contractor list. Contractor records can also be loaded from an external source, but license selection in the application is still limited to licenses in the list.</p> <p>Applicants who are contractors or their authorized agents can search for and select their license to retrieve information from the contractor list, but can't manually enter their license information.</p> | <p><b>Note:</b><br/>The agency doesn't limit the contractor selection to the agency's contractor list.</p> <p>The agency allows applicants to select contractor licenses from the contractor records list or an integrated external source. The validation process checks your contractor records first, and if you don't yet have a record of the license, the process retrieves information from the licensing body.</p> <p>Agency staff and applicants perform a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and re-validation is the only way to update the information. However, system administrators are able to modify contractor information.</p> <p>Applicants who enter a license number in an application can use the same validation process.</p> |

| Information Type | Contractor List Only   | Contractor List and External Source   |
|------------------|--|---|
|                  | <p>Applicants who are not contractors or authorized agents, such as homeowners, can optionally search for and select licenses to retrieve information from the contractor records about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant.</p> <p>You can search for a contractor by license number, business name, or owner name to retrieve license information.</p>  | <p>Applicants who self-identify as contractors or the contractor's authorized agents must select at least one license number.</p> <p>Other applicants can search for and select a license to retrieve license details, but they can also leave the contractor license blank. They can't manually enter data.</p> <p>You can search for a contractor by license number, business name, or owner name to retrieve license information.</p>  |
| License status   | <p>Agency staff uses the <i>Status</i> field to indicate if a license is active, suspended, expired, and so forth.</p> <p><b>Note:</b><br/>The license status is independent of contractor approval. For example, a license can have an active status but is disabled for use because it isn't approved. Licenses must be enabled to be entered in an application.</p> <p>Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.</p> | <p>The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by re-validating the license number.</p> <p>Your status mapping settings assign a default agency status based on the source status. Agency staff can update the internal status.</p> <p>Your status mapping settings also specify if specific source statuses will prevent applicants from submitting applications. If the application is declined due to the source status, the applicant sees a message explaining that the application can't be submitted. Note that the expiration date is checked regardless of status validation. If the license is expired, the application is declined regardless of the status.</p> |
| License type     | <p>When integration is not enabled, the agency must create a license type for contractor licenses. Set up the license type in the contractor license options.</p> <p>Applicants must select this value as the license type when they enter contractor license information in an application.</p> <p>Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p>                                  | <p>License types are not enabled in the contractor options, and applications do not include a license type field.</p> <p>Use license classifications to track the specific types of work that a contractor is licensed to perform.</p>  |

## Adding Licenses to an Application Form

Whether you're a homeowner, contractor, a contractor's authorized agent, or agency staff, you select a contractor license associated with the project while applying for a permit or on a planning application. You also identify a contact person for the license.

Your agency may limit your license selection in the application to their own list of contractors, regardless of an integration with an external source. In this case, the contractor list is the source of truth. Only agency-approved

contractors can be entered in the application. You can search for a contractor by license number, business name, or owner name to retrieve license information.

When your agency doesn't limit your license selection to their list of contractors, and the system integrates with an external licensing body, the process still initially checks the data in the main contractor records. You must have the exact license number to retrieve license information from the external source.

If your agency has applied one or more conditions to the contractor license, you'll see an icon for the most severe condition. You can select the license but depending on the condition rules, you may not be able to submit the application until the condition is resolved. Click the **Condition Applied** icon to see a list of the conditions, including the condition name, severity, description, and the date when the condition was applied.

If configured by your agency, the system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission.

When public users review details for submitted applications, they can see the contractor information. As with all other information in a submitted application, the contractor information is read-only.

## Applying as a Contractor or Authorized Agent

Contractors or authorized agents can submit an application for a permit or planning application. A contractor's authorized agent, such as an employee or contractor associated with the contracting business, can submit applications on behalf of a contractor. The applicant can self-identify as a contractor or authorized agent in the Contractor field group in an application form. When entering the contractor information, you select *Contractor* or *Authorized Agent* as the applicant role. If you don't self-identify as a contractor or authorized agent, this option doesn't appear, and the applicant role is *Applicant*.

Information about self-identified agents is saved to the associated contractor license details. Newly identified agents are saved with a status that shows that verification is pending. Agency staff can review the information, update the verification status, and indicate whether the authorized agent is a contractor operating under the contractor license.

If an applicant self-identifies as a contractor or authorized agent, then the applicant must select a contractor license. If integration is active and license selection isn't limited to the contractor list, the applicant can find the contractor using the exact license number.

The contractor information fields are populated by the process of validating a license number and only a system administrator can manually update them. The system creates a new contractor record in the agency's contractor list if there isn't already a record for the specified license number, and the applicant's contact information is automatically added to the Contacts page in the contractor license details.

Agency staff updating contractor information in the submitted application details can also identify the applicant as a contractor or authorized agent for the selected license.

## Adding License Contacts

When applicants add the contractor license to the intake form from the agency's contractor records, they select a contact person from the list of verified contractors associated with the license. They can't select an authorized agent as a contact person. When the applicant selects **Done** for the license information in the intake form, the selected contact person also appears in the **Contacts** section of the form. If there are multiple contractors associated with the license, applicants can select only one contact person.

Depending on the contact type the applicant assigns, the contact will have access to this permit or planning application. When the application is submitted, the applicant who self-identifies as a contractor or authorized agent is added to the list of contacts for the license in the agency's contractor records. The contractor will be available to select as a contact on application forms after the contractor details are verified on the contractor license details page.

**Note:** Only authorized agents identified as verified contractors on the license Contacts page can be selected as a contractor license contact person on permit or planning application intake forms.

Agency staff can also manually add contractors and authorized agents to the contractor license details on the Contacts page. Only system administrators can remove contacts from a contractor record.

## Working with Contractor Licenses




Agency staff use the main contractor license page to view a list of records and summary information about each contractor license.

From here, you can manually create a license record. You can also take various actions for each contractor license, such as accessing license details, and validating or deleting the license record.

Depending on your agency's implementation, the grid on the contractors list page appears in a condensed format, where several fields appear in a column, or an expanded format, where one field appears in each column.

Here's an overview of the summary information and actions you can take on the contractors list page as displayed in the condensed format:

1. Select **Contractor > Contractors**.
2. Review the following summary information:

| Page Element   | Description  |
|--|--|
|  Lock<br><br> Hold<br><br> Notice | <p>Indicates that at least one condition is applied to the contractor license. The icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>A Lock condition enforces all rules to restrict permit and planning application activity associated with a license. A Hold condition indicates that one or more rules apply. And the Notice condition shows there's an issue but no restrictions. For more information, see <a href="#">Applying Conditions to Contractor Licenses</a>.</p> |
| <b>License</b>   | Displays the contractor license number and its status.   |
| <b>License Type</b>  | Displays the license type. The agency sets up contractor license types on the Contractor License Options page.   |
| <b>Dates</b>   | Displays the license issue date (or reissue date, if one exists), and the license expiration date.   |
| <b>Contractor</b>  | Displays the name of the contractor business and owner name.   |

| Page Element               | Description  |
|----------------------------|--|
|                            |  |
| <b>Address</b>             | Displays the address of the contractor business.   |
| <b>Phone</b>               | Displays the phone number of the contractor business.  |
| <b>Email</b>               | Displays the email address of the contractor business.   |
| <b>Last Refreshed</b>      | Displays the date that license information was most recently synchronized with the external licensing body's record. This field is relevant only if integration is active.   |
| <b>Used in Application</b> | <p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications.</p> <p>When a record is created in the main contractor pages, the initial value is <i>No</i>. The value is <i>Yes</i> if an application referencing this license has been submitted.</p>   |
| <b>Contractor Approved</b> | <p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor license is approved by the agency and available for use with an application. You can't select a contractor license or submit an application when a license is not approved in the contractor records. If the agency changes a license to not approved after an application was submitted, an icon on the license in the application details indicates that the license is not approved.</p> <p>This option doesn't affect the license status. For example, you can change an active license to not approved for business purposes.</p> |

- Click the column to sort by the fields in each column. When the grid is in the condensed format, you can click the **Contractor** column to sort by *Business Name* or *Owner Name*.

In the expanded format, **Business** and **Owner** are separate columns. In the expanded format, you can personalize the grid display in addition to sorting by column. For information about condensed and expanded grid formats and common grid controls, see [Using Grids](#) and [Personalizing Grid Displays](#).

- Use the three-dot **Actions** menu to perform these actions:

| Action          | Description   |
|-----------------|---|
| <b>Validate</b> | Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.   |
| <b>Delete</b>   | Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the <b>Used in Application</b> field. |

5. Select the row of the contractor license to access the detail pages, where you can update the contractor information, including contractor approval.

## Adding Contractor Licenses

Agency staff with appropriate permissions can manually enter individual contractor license information in the main contractor records shown in the list on the Contractors page.

Your agency may initially use an automated batch method to load multiple records from a file or an integration with an external licensing body. The batch method can also be used to update license records through an integration on a regular basis. For more information about adding or updating contractor licenses automatically, see [Loading Contractor Licenses](#).

For information about adding contractor licenses to a permit or planning application after it's been submitted, see [Working with Contractors and Agents in Applications](#).

Here's how to manually add a contractor license to the contractor records:

1. Select **Contractor > Contractors**.
2. Click **Add**.

The **Add Contractor** page displays the following the read-only information:

| Page Element          | Description  |
|-----------------------|--|
| <b>License Source</b> | Identifies the license's status coming from the licensing body and brought in through integration with the external source.<br><br>See <a href="#">Setting Up Contractor License Options</a> . |

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
5. If you do *not* integrate with an external licensing body, enter the following:

| Page Element          | Description  |
|-----------------------|--|
| <b>License Type</b>   | Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.<br><br>This field is not visible if you integrate with an external licensing body. |
| <b>License Status</b> | Select the license status. Values include <i>Active</i> , <i>Canceled</i> , <i>Expired</i> , <i>Suspended</i> , <i>Revoked</i> , and <i>Inactive</i> .   |

| Page Element | Description  |
|--------------|--|
|              | <p>This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses.</p> <p>When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see <a href="#">Setting Up Contractor License Options</a>.</p> |

6. If you use integration to get information from an external licensing body:

a. Click **Validate**.

This button is visible only when integration is enabled. The validation process uses the license number to retrieve additional details from the licensing body. When the process finishes successfully, it populates the rest of the fields on the page.

It's helpful to note that contractor selection in the application intake and the transaction details also automatically fills in the contractor fields. However, this information comes from the agency's list of contractors that have already been validated. If the contractor isn't in the agency contractor list, and an integration is available, the contractor information comes from the external source.

b. Confirm the license status.

The read-only **Source Status** field displays the status provided by the external licensing body. This value is updated any time you re-validate the license. Your contractor options map the source status to a status that comes from the set of statuses your agency assigns to licenses. If a source status is not mapped to an agency status, the default agency status is *Other*.

7. Enter, update, or review information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Business information includes these fields:

| Page Element          | Description   |
|-----------------------|---|
| <b>Business Name</b>  | The name of the contractor business.  |
| <b>Owner Name</b>     | The owner of the contractor business.   |
| <b>Ownership Type</b> | The ownership structure for the business, such as <i>Sole Proprietor</i> or <i>Partnership</i> .  |
| <b>Postal Code</b>    | <p>The business address. The <b>Country</b> field displays US.</p> <p>As you enter a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.</p> |

| Page Element                                    | Description  |
|---|--|
|   | If you don't know the postal code, click the <b>Don't know</b> link to display a full set of address fields. |
| <b>Address Line 1</b> and <b>Address Line 2</b> | The business address. Only one address line is required.   |
| <b>Phone</b>                                    | The phone number for the business.   |
| <b>Email</b>                                    | The email address for the business.  |
| <b>Issue Date</b>                               | The date that the license was originally issued.   |
| <b>Reissue Date</b>                             | The date that the license was reissued after a period of inactivity or after it expired.                     |
| <b>Expire Date</b>                              | The date that the license expired or is due to expire.   |

8. Enter, update, or review additional information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

System-wide contractor options determine what additional information is available and how it is labeled. Your agency can change the section names on the Contractor License Sections page. If the agency displays all available information using the default labels, these sections appear:

| Section Name                 | Description   |
|------------------------------|---|
| <b>Classifications</b>       | License classifications indicate the type of work that the contractor is licensed to perform.<br><br>This grid lists a <b>Code</b> and a <b>Description</b> for each classification.<br><br>If integration is not active and the fields are editable, selecting a code displays the associated description. |
| <b>Contractor Bond</b>       | Contractor bond information includes the <b>Company Name</b> (the bond issuer), <b>Policy Number</b> , <b>Amount</b> , <b>Effective Date</b> , and <b>Cancellation Date</b> .   |
| <b>Other Bonds</b>           | Information for other bonds includes a <b>Qualifier Name</b> (the name of the qualifying individual on the bond) and the same fields that appear for contractor bonds.  |
| <b>Workers' Compensation</b> | Insurance information includes the <b>Insurance Type</b> (such as Workers' Compensation), <b>Company Name</b> , <b>Policy Number</b> , <b>Exempt</b> status, <b>Effective Date</b> , <b>Expiration Date</b> , <b>Cancellation Date</b> , and <b>Suspend Date</b> .  |



| Section Name       | Description  |
|--------------------|--|
| <b>Attachments</b> | <p>Supporting documents can be added after license information has been saved. Attachment information includes the uploaded document, <b>Document Category</b>, and <b>Document Subcategory</b>.</p> <p>When you modify attachments in the contractor record details, you can add a reference to a person associated with the attachment in the <b>Assigned To</b> field.</p> <p>You can modify or delete an attachment only if you uploaded it.</p> |

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

## Managing Contractor License Details

Agency staff can modify the details for an individual contractor license depending on the assigned permissions. Staff can also add contacts and manage comments and attachments.

### Modifying License Details

When your agency isn't integrated with an external licensing body, both system administrators and permit technicians can update license information. When integration is on, only system administrators can update license information, but permit technicians can approve licenses.

Only agency staff with the contractor administration duty role have the privileges needed to delete a license from the contractor records.

To modify the license information for a contractor:

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to modify.
3. Click the License Details tab in the left panel or the **View Details** link under the License Details section on the overview page.
4. Click **Edit**.
5. Make your updates:
  - o Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
  - o Update the **License Status**.
  - o If integration is active, click the **Validate** button to retrieve the most recent contractor information and refresh the license detail fields.
 

System administrators can update data manually even when integration is active.
  - o If integration is not active, manually modify the contractor information as needed.
6. Click **Save**.

## Adding Contacts

When applicants identify themselves as authorized agents for a contractor in a permit or planning application, their contact information appears on the Contacts page in the license details. Agencies can now also manually add contractor contacts or authorized agents associated with the license directly to the contractor license details. You can add contacts who are already registered in the system and also register new contacts. Only system administrators can delete contacts from the license details.

Click the Contacts tab in the left panel to open the Contacts page.

Here's how to add contacts who are already registered in the system:

1. On the Contacts page, click **Add** to add a contact.
2. On the Select from Registered Users page, click the row for the contact you would like to add.
3. Select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent*.

You can also register a new contact:

1. On the Contacts page, click **Add** to add a contact.
2. On the Select from Registered Users page, click the **Register New Contact** link.
3. Fill out the registration form with contact information and select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent*.
4. Click **Register**.
5. Click **Done** on the Registration Confirmation page.

When you add a contact, the status is automatically verified and active. Only contacts with a *Contractor* contact type and an *Active* status can be selected as the contractor's contact in an intake form.

Select a contact in the license details to update the verification status and contact information on the Contact Details page.

## Working with Attachments

Only agency staff can add, view details, download, or delete attachments in the contractor license record details on the Attachments page. You can modify or delete an attachment only if you uploaded it. Click the Attachments tab in the left panel to open the Attachments page.

1. On the Attachments page, click **Add** to upload the file.
2. Add a description, document category, and document subcategory on the Add Attachments page.

If there are agents for the contractor associated with this contractor license, you can select one of those people to reference in the **Assigned To** field.

3. Click the **Actions** icon and select *View Details* for an attachment to view or modify details. You can update the description, document category, document subcategory, and referenced person.
4. To download or delete an attachment, click the **Actions** icon and select the respective link.

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

## Adding Comments

Only agency staff can add or delete comments in the contractor license record details on the Comments page. You can modify or delete a comment only if you added it. Click the Comments tab in the left panel to open the Comments page. Comments are for internal reference only and not visible to the public.

1. On the Comments page, click the **Add Comment** button to open the Add Comment page and enter a new comment in rich text formatting. Rich text formatting enables you to select fonts, add numbered lists, insert links, and more.
2. You can modify or delete a comment only if it was entered by you. Click the specific comment row to open the editor view and make changes or click the **Delete** button.
3. Click **Save** to post the comment and return to the Comments page.




For more information, see [Working with Comments](#) and [Managing Comments](#).

## Viewing Contractor License Use

The Transactions page in the contractor details provides a list of the permit and planning applications where the contractor is used.

Agency staff can view all transactions associated with the contractor license in the agency's license details.

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to review.
3. Click the Transactions tab in the left navigation panel.
4. View the applications listed on the Transactions page.

| Page Element  | Description   |
|---|---|
|                    | Indicates the column that shows condition icons when a grid is displayed in the expanded format. Click the condition icon to view a list of conditions placed on the application and drill down to the Conditions page in the application details.<br><br>For more information about conditions placed on permits or planning applications, see <a href="#">Applying Conditions to Applications</a> . |
|  Show All Statuses | Turn on the switch to display applications that are no longer in progress, such as completed or withdrawn. When the switch is off, the grid displays only applications that are in progress.  |
|                    | Indicates applications where the contractor is no longer being used.  |
| Application information   | Review summary information about an application: <ul style="list-style-type: none"> <li>o ID</li> <li>o Application</li> </ul>  |

| Page Element | Description  |
|--------------|--|
|              | <ul style="list-style-type: none"> <li>o Status</li> <li>o Property</li> <li>o City</li> <li>o Description</li> <li>o Applicant</li> <li>o Total Fees</li> </ul> |

**Note:** For information about grid formats and common grid controls, see *Using Grids* and *Personalizing Grid Displays*.

- Click the transaction row to open the application's Overview page in the permit or planning application details. If the transaction is in a *Pending* status, the application form opens when you click the row.

## Managing Authorized Agents

Authorized agents are added when an applicant self-identifies as an agent for a licensed contractor on an intake form. Agency staff can also manually add and update authorized agents on the Contacts page in the contractor record details, and indicate whether the authorized agent is a contractor operating under the contractor license.

The agent's name and contact information are copied from the applicant information on the intake form and added to the contact list in the **Contacts** tab of the contractor license details. You can verify the agent and update their verification status depending on the results. Agents who are pending verification or whose verification failed have an inactive status.

When you manually add an authorized agent or contractor to the contractor details, the new contact is automatically active. For information about manually adding authorized agents or contractors operating under a license, see "Adding Contacts" in *Managing Contractor License Details*.

To manage authorized agents for a license:

- Select **Contractor > Contractors**.
- Locate and select the contractor license.
- Click the **Contacts** tab in the left navigation pane to access the Contacts page with authorized agents and contractors associated with the license.
- Review the following information:

| Page Element | Description   |
|--------------|---|
| <b>Name</b>  | Displays the authorized agent or contractor's name, email, and phone. |
| <b>Email</b> | Displays the email address of the license contact.                    |
| <b>Phone</b> | Displays the phone number of the license contact.                     |

| Page Element    | Description   |
|-----------------|---|
| <b>Business</b> | Displays the business name of the license contact.  |
| <b>Type</b>     | <p>Displays the relationship this person has to the contractor license:</p> <ul style="list-style-type: none"> <li>○ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license.</li> <li>○ <i>Contractor</i>: A person who is a contractor operating under this license.</li> </ul> <p><b>Note:</b><br/>Only active contractors can be selected as a contractor license contact on the permit or planning application intake form.</p> |
| <b>Status</b>   | <p>Displays <i>Active</i> if the agent has been verified.</p> <p>Displays <i>Inactive</i> if verification is pending or the verification has failed.</p>  |

5. Click a row to access agent details.
6. Update the **Verification Status** by selecting *Verified*, *Pending verification*, or *Verification failed*.

The default status for an agent who submits an application is *Pending verification*. When you manually add an agent, the status is *Verified* and the status is *Active*.

7. Update the **Type** by selecting *Authorized Agent* or *Contractor* to indicate how the person is associated with the license.
8. Make any necessary changes to the agent's contact information, including business name.

You can update everything except the agent's name.

9. Click **Save**.

## Applying Conditions to Contractor Licenses

Agency staff can apply conditions to contractor licenses to indicate an issue exists and limit permit or planning application activity when the contractor license is used. For example, a condition applied to a contractor license may prevent the submittal of an application where the license is selected or an inspection can't be requested for a permit associated with the license.




Agency staff apply, modify, and resolve contractor conditions on the contractor records in the agency-maintained list. The Conditions page in the contractor details lists all of the conditions applied to the selected contractor, with applied conditions followed by resolved conditions. The condition indicator in the header of the detail pages displays the most severe condition. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.

When you select the option to apply a contractor condition to transactions, the contractor condition is applicable to permits and planning applications when the license is used. You can choose whether to apply the condition to in-process permits and planning applications.

**CAUTION:** Changing the license type clears conditions on the license. The license type can only be changed when the license isn't used on a transaction and doesn't have any conditions. For more information about license types, see [Contractor License Overview](#) and [Adding Contractor Licenses](#).

## Adding a Condition to a Contractor License

1. Click **Contractors** on the agency springboard.  
Select a contractor license.  
Click **Conditions** in the left panel.
2. Click **Apply Condition** in the right panel.
3. On the Condition Details page, enter values for the following fields:

| Page Element   | Description  |
|--|--|
| <b>Condition Name</b>  | Use the lookup prompt to search for and select the condition that you want to apply. The search page lists the available conditions set up for contractor licenses along with their severity, display message, and description.<br><br>For more information on conditions, see <a href="#">Setting Up Conditions</a> .   |
| <b>Display Message</b>   | Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and can't be updated here.   |
| <b>Severity</b><br><br> Lock  Hold<br><br> Notice | Displays the level of severity defined for the selected condition. <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>  |
| <b>Apply Condition to Transactions</b>   | Applies the condition to permits and planning applications that are associated with the selected contractor license.<br><br>When you turn off this switch, the only condition rule that can apply is <i>Prevent Application Progress</i> , which prevents you from submitting an intake form using the contractor or manually adding the contractor to a permit or planning application.<br><br>The condition setup determines whether this switch is turned off or on by default.<br><br>For more information on setup and condition rules, see <a href="#">Setting Up Conditions</a> . |
| <b>Include in-process transactions</b>   | Turn on this switch if you want to apply the condition to the in-process permits and planning applications related to the contractor license.  |

| Page Element                         | Description   |
|--------------------------------------|---|
|                                      | <p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> link to view the list of permits and planning applications where the condition will be applied.</p>   |
| <p><b>Condition Rules</b></p>        | <p>Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied.</p> <p>Available rules include the following:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b> (applicable only when a license is used on an intake form)</li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>You also can't add the license to the Contractor page in the application details when the <b>Prevent Application Progress</b> rule is applied.</p> <p>For condition rule descriptions, see <a href="#">Setting Up Conditions</a>.</p> |
| <p><b>Priority</b></p>               | <p>Select a priority for the condition. Values are <i>High</i>, <i>Medium</i>, and <i>Low</i>.</p>  |
| <p><b>Description</b></p>            | <p>Displays the description entered by your agency administrator on the condition setup page, but you can update the text here.</p>   |
| <p><b>Additional Information</b></p> | <p>Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.</p>  |

4. Click **Save**.

## Resolving a Condition

You can resolve a condition that was applied to a contractor license. You must resolve the Lock and Hold conditions on licenses to lift any restrictions on application activity.

1. Click **Contractors** on the agency springboard.

Select a contractor license.

Click **Conditions** in the left panel.

2. Click **Resolve** for the condition you want to remove.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Click **Save**.

You can view resolution details for a resolved condition by clicking the **View More Details** button for a condition in the list.

## Modifying a Condition

You can modify a condition that you applied to a contractor license.

1. Click **Contractors** on the agency springboard.  
Select a contractor license.  
Click **Conditions** in the left panel.
2. Click the **View More Details** button for the condition you want to modify.
3. On the Condition Details page you can update the priority, description, and additional information.
4. Click **Save**.

You can't modify any fields for a resolved condition, but you can view the resolution details by clicking the **View More Details** button.



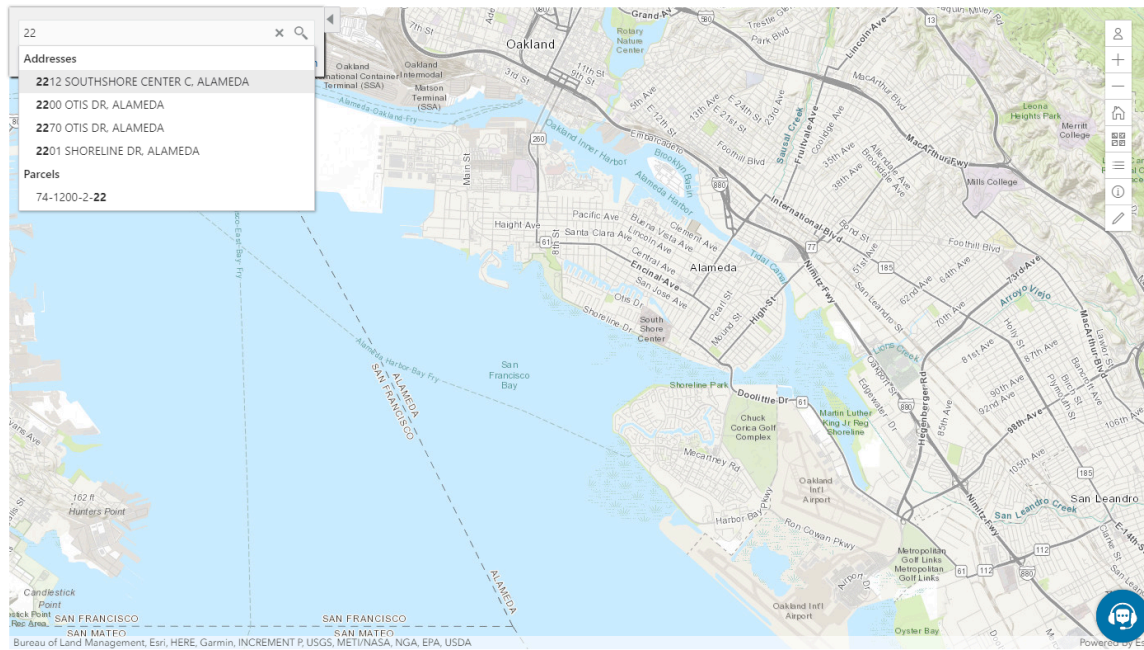
# 12 Working with Maps

## 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<br>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.<br><br><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<br>Registered public users | For agency staff: access the application lists on the <b>Transactions</b> page.<br><br>For registered public users: access the application lists on the <b>Applications</b> page.<br><br>On any of these pages, click the <b>Map View</b> icon.   | View the locations of the transactions on the list.<br><br>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.<br><br>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.<br><br>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.<br><br>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.<br><br>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.<br><br>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.<br><br>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<br><br>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.<br><br>If the transaction is not associated with a location, the map displays the initial extent that is defined on the map profile. |

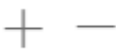






## Using the Map Toolbar

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.<br><br>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.<br><br>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.<br><br>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.  |

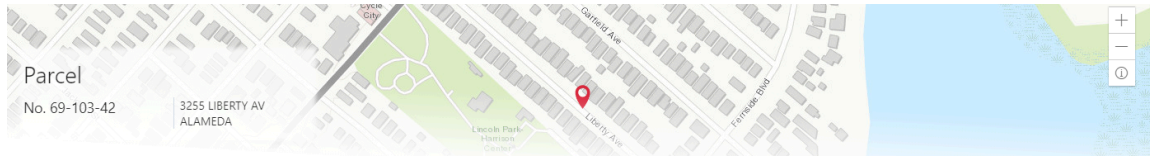
## Viewing Map Markers

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.

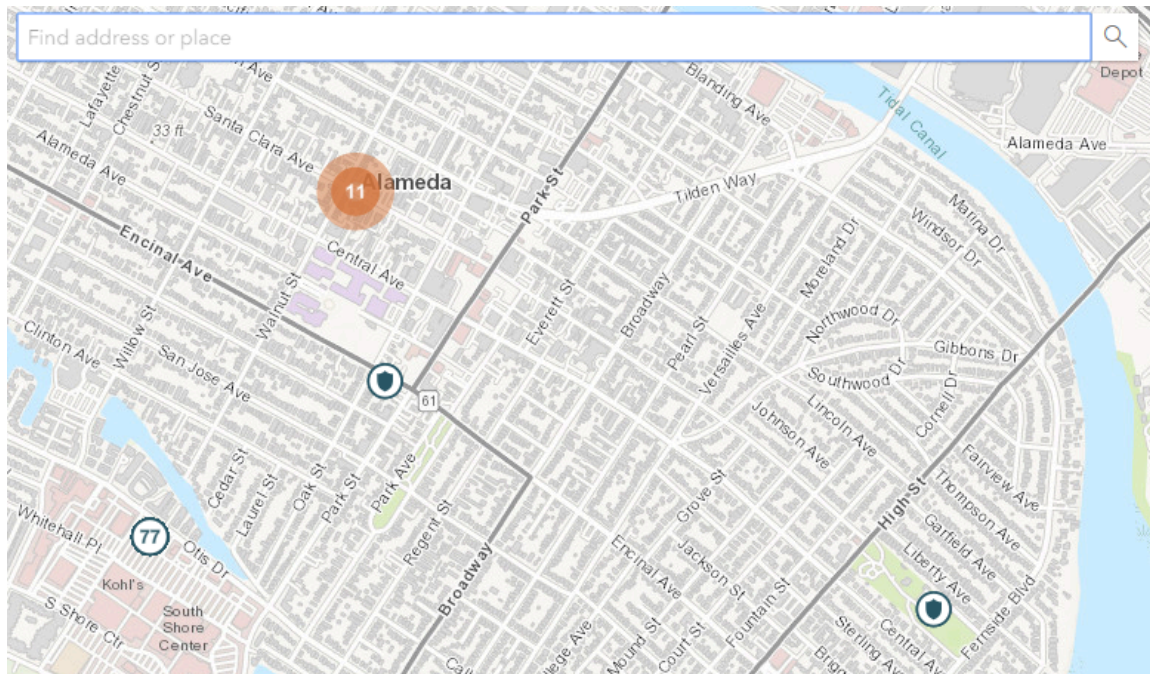


## Other Map Markers


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. |

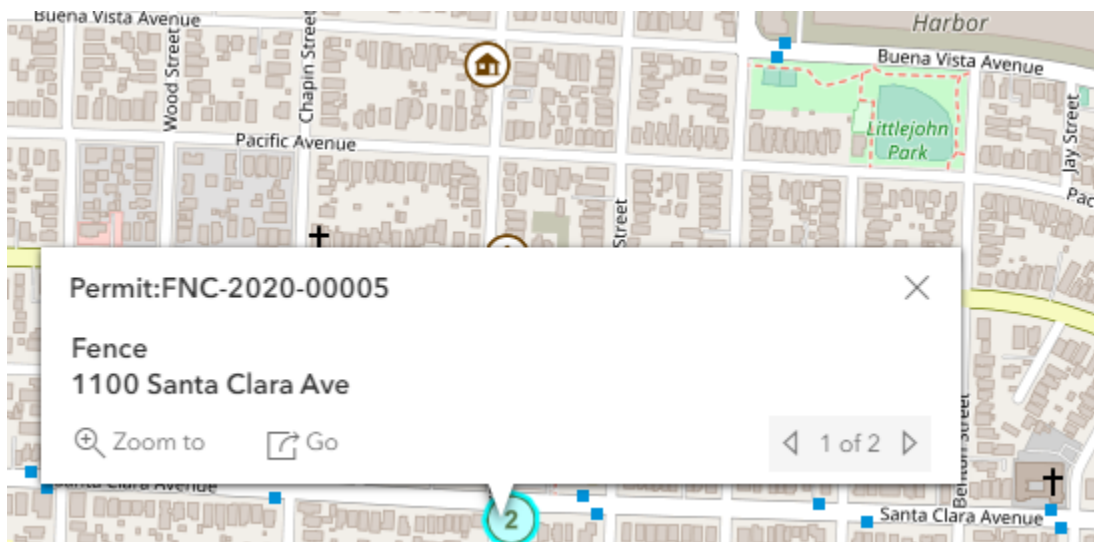
| Map Marker  | Description   |
|---|---|
|  | The location has a single permit application.   |
|  | The location has a single planning application.   |
|  | The location has a single project.  |
|  | The location has a single business license.   |
|  | There are multiple transactions at the same location.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

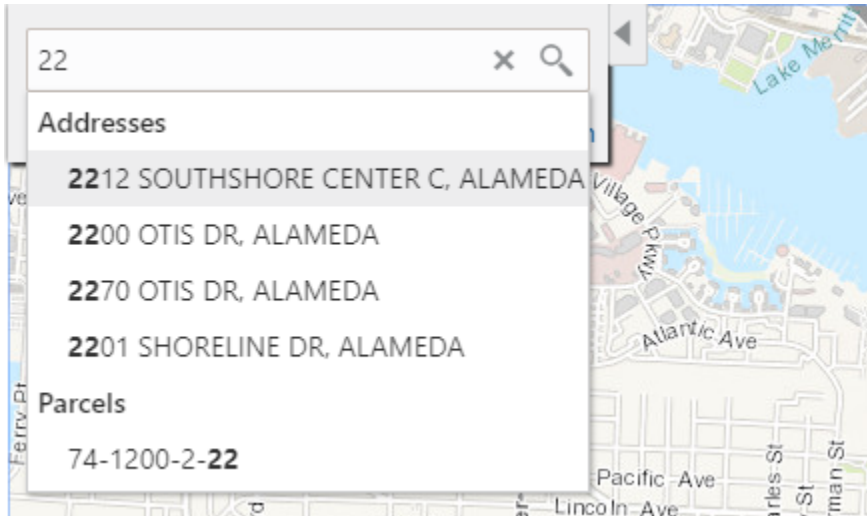
All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user’s own transactions appear.

**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](#).

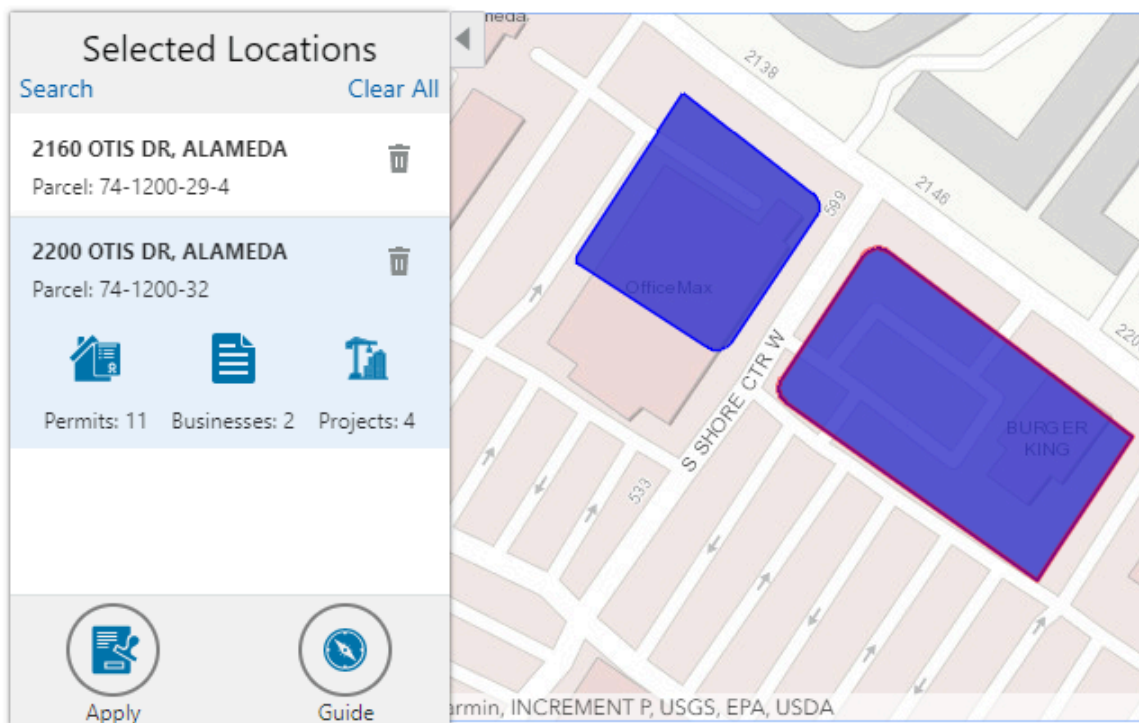
## Selecting Properties Using the Basic Search

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   |
|--|---|
| <br>Draw a Point    | Click one or more points on the map to select the properties that contain the points.   |
| <br>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  |
|---|--|
| <br>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. |
| <br>Deselect One   | Click a selected property to deselect it.<br><br><b>Note:</b><br>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.       |
| <br>Deselect All   | Click this button to deselect all properties.  |
| <br>Close          | Click to close the toolbar.  |

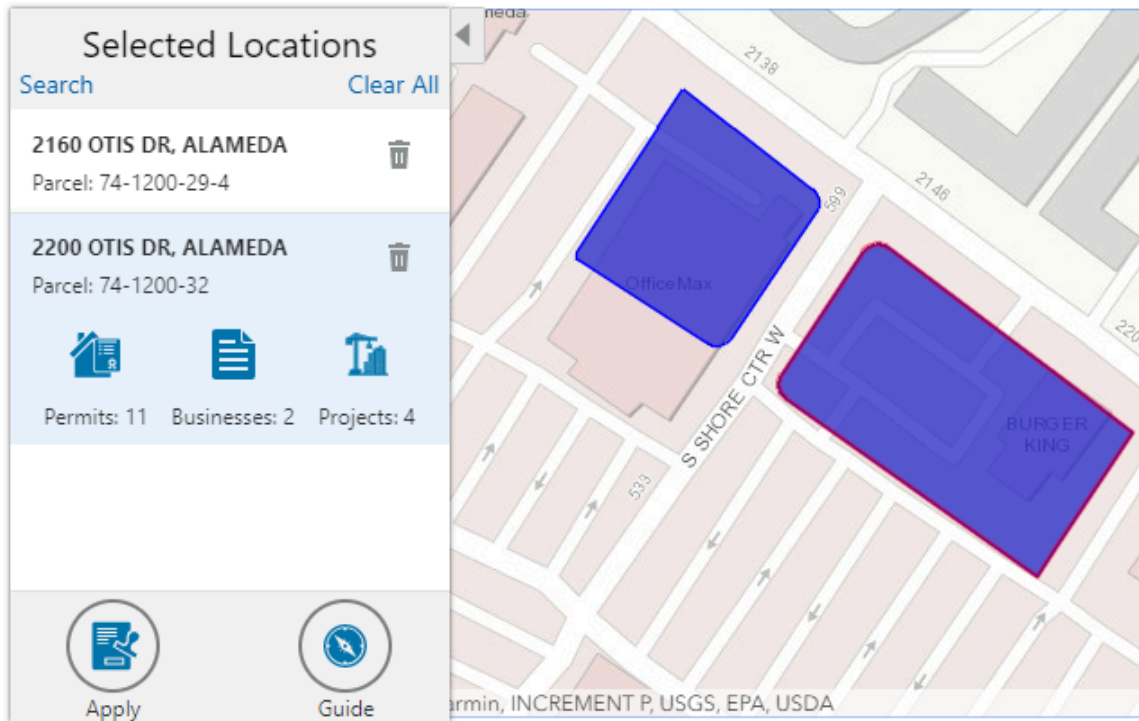
**3.** Review details of your selections on the Selected Locations list.

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).

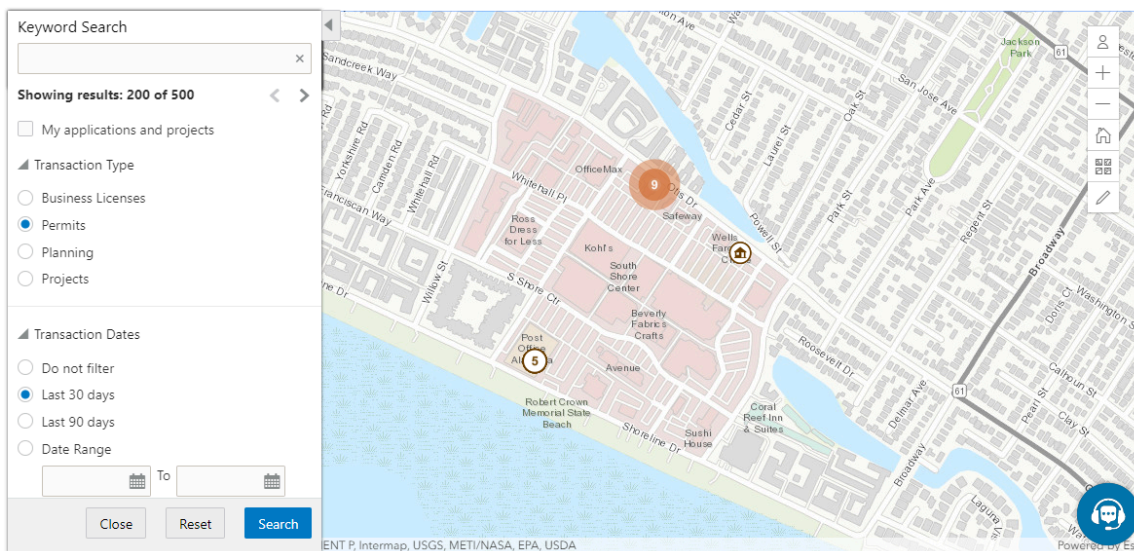
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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.



# 13 Working with Payments

## Security Details for Working with Payments

This topic describes important security roles, requirements, or considerations specific to working with payments.

| Primary Role                            | Access Description                                     | Associated Job Roles and Abstract Roles   |
|---|--|---|
| PSC Cashier Administration              | Make payments and manage all cashier related duties.   | PSC System Administrator<br>PSC Finance Administrator<br>PSC Cashier<br>PSC System Administrator  |
| PSC Planning and Zoning Fees Management | Add, update, and delete fees on planning applications. | PSC Zoning Administrator<br>PSC Planning Assistant<br>PSC Associate Planner<br>PSC Principal Planner  |
| PSC Permits Fees Management             | Add, update, and delete fees on permits.               | PSC Inspections Supervisor<br>PSC Chief Building Officer<br>PSC Business Analyst<br>PSC Principal Planner<br>PSC Planning Coordinator<br>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](#).

## Payment Flow Overview

This topic provides a high-level overview of fees and the payment flow. Applicants and contacts with application access can make payments online, and agency staff can assist applicants with payments.

After an application is submitted, the fees are calculated and applied to the applicant's account. The applicant and contacts with application access can pay fees for one application at a time from their Applications list page or from the Fees and Payments page in the application details. Only applicants can select multiple applications for payment on the Make a Payment page, which they access from the registered user landing page or their Applications page. Agency staff can initiate payment from the Transactions list page or from the Fees and Payments page in the application details. System processing for payments triggers workflow and generates accounting, invoices, and communications.

For information about setting up fees and payments, see *Implementing Your Financials Framework*.

## Understanding Fees

Some basics about fees include the following:

- Fees for an application are determined by decision modeling and associated with fee schedules.
- Fees may be applied during the application process or later for additional fees or adjustments.
- Fees appear on the Applications and Make a Payment pages for applicants, on the Transactions list page for agency staff, and on the Fees and Payments page in the application details for both agency staff and applicants. Contacts with application access can pay fees from their Applications page and the application's Fees and Payments page.
- If a condition to prevent payment is applied to the transaction, the fees can't be paid until the condition is resolved.
- Agency staff can add, adjust, or refund fees. They can also make full or partial fee payment on behalf of the applicant.
- Applicants receive a fees notice after submitting an application. They are sent subsequent notices when fees due are updated. Agencies may send out notices with consolidated fees on a regular basis.

## Fee Payments Process for Applicants

Applicants have different options for paying fees after they log in.

Applicants can pay for fees one application at a time by clicking the **Pay** icon in the application row on the Applications page or by clicking the **Pay** button on the Fees and Payments page for the application. Clicking **Pay** takes the applicant directly to checkout for payment processing.

The **Make a Payment** button on the registered user landing page and on the Applications page takes the applicant to the Make a Payment page, where they can select fees for multiple applications at once before continuing to checkout.

Here's how to pay fees from the Make a Payment page:

1. Select applications for payment.  
Fees for applications not selected for payment are still payable and remain on the page.
2. Review the number of applications selected and the total amount, then click the **Make a Payment** button.
3. Review the Checkout page, which shows the different secured payment methods available.  
Only agency staff can process cash and check payments.
4. Select one of the payment methods for payment processing and click **Make Payment**.

Depending on the payment service being used, the payment steps differ.

The applicant must have a PayPal account before selecting PayPal as a payment method.

5. Wait for the payment to be processed. If you navigate away from the payment service or close the browser, the payment may not be recorded.

After submitting the payment, the application displays the *Payment Processing* status on the Make a Payment page. If the payment goes through, the application is removed from the Make a Payment page and the applicant is redirected to the page where the payment was initiated. If the payment fails, the applications can be selected for payment again.

For more information, see *Making Payments*.

For information about paying fees for individual applications on the registered public user's Applications page or the Fees and Payments page in the application's details, see *Managing Transactions* and *Working with Fees and Payments*.

## Fee Payments Process for Agency Staff

Agency staff can use the following process to assist an applicant with a payment:

1. Click the **Pay** button for a permit, planning application, or business license listed on the Transactions page or on the Fees and Payments page in the application details.
2. On the Pay Fees page, review the list of fee items and the total payable fee. If you want to make a partial payment, deselect the *Select All* check box to clear the check boxes for all the fee items and then select individual items. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.
3. Click the **Continue** button.
4. Review the Checkout page, which lists the different payment methods available, such as cash or credit card.
5. Select one of the payment methods for payment processing.

Depending on the payment service being used, the payment steps differ.

After successful payment, the agency user is returned to the page where the payment was initiated. The fee item records are now updated. For more information, see *Managing Transactions* and *Working with Fees and Payments*.

## Working with Cashier Sessions

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

### Opening a Cashier Session

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

| Page Element      | Description   |
|-------------------|---|
| Cashier Drawer ID | Select the cash drawer that you want to use for this session.     |
| Session ID        | Displays the unique, system-generated ID for the cashier session. |
| Start Time        | Displays the date and time the session was created.               |

| Page Element           | Description   |
|------------------------|---|
|                        |   |
| <b>Status</b>          | All new cashier sessions have a status of <i>Open</i> .   |
| <b>Cashier ID</b>      | Displays the unique ID of the cashier who is opening the cashier session.<br><br>Administrators assign cashier IDs to agency staff on the Agency Staff page. You cannot open a cashier session if you do not have a cashier ID assigned to you. |
| <b>Opening Balance</b> | Enter the amount in the cash drawer at the beginning of the cashier session.  |

4. Click **Save**.

## Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:
  - o Suspend an open cashier session by setting the **Status** to *Suspended*.
  - o Reopen a suspended or closed cashier session by setting the **Status** back to *Open*.  
This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See [Setting Up Agency Payment Options](#).
  - o Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

You can now close a cashier session with a zero balance.

**Note:** The system populates the **End Time** field with the date and time the session was closed.

4. Click **Save**.

**Note:** You cannot edit a cashier session that has been reconciled. See [Reconciling Cashier Sessions](#).

## Reconciling Cashier Sessions

Agency staff adjust and reconcile cashier sessions on the Reconcile Cashier Session page.

Agencies that collect payments must reconcile the money collected in the form of cash and checks at the end of each cashier session. On the Reconcile Cashier Session, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page.

Reconcile Cashier Session Cancel Save Reconciliation Complete Reconciliation

Cash Drawer ID: Cash Drawer 01      Session ID: 1022  
 Start Time: 9/29/18 3:26 AM      End Time: 8/8/19 11:25 PM  
 Status: Closed      Reconcile Status: Unreconcile

---

Payment Information

| Payment Method | Currency | Opening Balance | Recorded Amount |
|----------------|----------|-----------------|-----------------|
| Cash           | USD      | 100             | 93.5            |
| Personal check | USD      | 0               | 67              |

Comments

## Reconciling Recorded and Actual Amounts

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the row for the cashier session that you want to reconcile.

**Note:** You can view payment information for open cashier sessions on this page, but a cashier session must be closed before you can reconcile recorded and actual amounts. For more information on closing cashier sessions, see *Working with Cashier Sessions*.

3. Click the row for the payment method that you want to reconcile to access the Payment Details page.

This example shows the Payment Details page.

Payment Details x

[Save](#)

Payment Summary

Payment Method: Cash      Currency: USD  
 Opening Balance: 100      Total Overage: 0  
 Recorded Amount: 93.5      Total Shortage: 1.25  
 Actual Amount:

Payment Details

| Receipt Number | Receipt Line Number | Recorded Amount | Actual Amount |
|----------------|---------------------|-----------------|---------------|
| 6              | 1                   | 67              |               |
| 5              | 1                   | 26.5            |               |

4. Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

| Page Element          | Description   |
|-----------------------|---|
| <b>Payment Method</b> | Select between <i>Personal check</i> and <i>Cashier check</i> .   |
| <b>Actual Amount</b>  | Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here. |

| Page Element   | Description   |
|--|---|
| <b>Check Number, Check Date, Payer Name, and Address</b> | Update the check and payer information.                     |
| <b>Comments</b>  | Enter any comments you want to add about the check payment. |

5. Click **Save**.
6. On the Payment Details page, enter the actual amount for the cashier session for all receipts for the payment method. After you enter a value in the **Actual Amount** field, the page displays any overages or shortages in the **Total Overage** and **Total Shortage** fields.
7. Click **Save**.
8. On the Reconcile Cashier Session page, enter any comments you want to add for the entire cashier session and click **Save Reconciliation** to save all the changes you made for the cashier session.
9. Click **Complete Reconciliation**. This changes the status of the cashier session from *Unreconciled* to *Reconciled*. In addition, the **Save Reconciliation** button is replaced by the **Print Report** button, and the **Complete Reconciliation** button is replaced by the **Generate Event** button.

**Note:** Once you complete a reconciliation for a cashier session, you can't reopen it or make any adjustments to the session.

## Printing a Cashier Session Reconciliation Report

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to print a reconciliation report.
3. Complete the reconciliation for the cashier session if you haven't already. You can print reconciliation reports only for sessions with a **Reconcile Status** of *Reconcile*.
4. Click **Print Report**. The generated report opens in a separate browser tab.

**Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Public Sector Licensing and Permitting.

The Cashier Session Reconciliation report requires the definition of a parameter with the following values:

| Page Element               | Value          |
|----------------------------|----------------|
| <b>Parameter ID</b>        | 1              |
| <b>Parameter Name</b>      | P_RECONCILE_ID |
| <b>Parameter Data Type</b> | String         |

For more information on defining parameters for reports, see [Setting Up Reports](#).

## Generate Accounting Entries for Reconciliation Overages and Shortages

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to generate an accounting entry.
3. Complete the reconciliation for the cashier session if you haven't already. You can generate accounting entries only for completed reconciliations that result in an overage or a shortage.
4. Click **Generate Event** to generate an accounting entry for the overage or shortage.

**Note:** To successfully create accounting entries for cashier reconciliation overages and shortages, you must first create accounting rules for them. For more information on setting up accounting rules, see [Setting Up Accounting Rules](#).

## Printing Deposit Slips

Agencies that collect payments use deposit slips to deposit the money collected in the form of cash and checks into the agency's bank account.

You print deposit slips using the Print Deposit Slip page.

### Prerequisites

Before you generate deposit slips for your agency, you must define the P\_DEPOSIT\_SLIP\_NUMBER parameter for the Deposit Slip (DepositSlip001) report. For more information on defining report parameters, see [Setting Up Reports](#).

### Generating Deposit Slips

1. Select **Billing and Payment > Deposit Slip**.
2. On the Print Deposit Slip page, enter values for the following fields:

| Page Element                                 | Description  |
|--|--|
| <b>Agency ID</b>                             | Select the agency for which you want to print a deposit slip.  |
| <b>From Receipt Date and To Receipt Date</b> | Select the date range of receipts that you want to include in the deposit slip.  |
| <b>Payment Method</b>                        | Select the payment methods that you wanted to include in the deposit slip. Options are <b>Cash</b> , <b>Cashier Check</b> , and <b>Personal Check</b> .  |
| <b>Cash Drawer ID</b>                        | Select a value to print a deposit slip for the receipts of a specific cash drawer. If you leave this field blank, the deposit slip will include all cash drawers for the specified date range. |
| <b>Session ID</b>                            | Select a value to print a deposit slip for the receipts of a cashier session. If you leave this field blank, the deposit slip will include all cashier sessions for the specified date range.  |

| Page Element      | Description  |
|-------------------|--|
| <b>Cashier ID</b> | Select a value to print a deposit slip for the receipts of a specific cashier. If you leave this field blank, the deposit slip will include all cashiers for the specified date range. |

**Note:** The values available in the Cash Drawer ID, Session ID, and Cashier ID drop-down fields represent the cash drawer payment history rows within the entered date range that have not yet been printed. Therefore, the values available in the drop-down fields change based on the entered date range. If a selected drop-down value becomes invalid because you change the date range, the field with the invalid value becomes blank. If the selected drop-down value remains valid after changing the date range, the drop-down value is unchanged.

3. Click **Print**. The generated deposit slip file opens in a separate browser tab.

**Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Public Sector Licensing and Permitting.

## Viewing Payment History

Agency staff can view payment history on the Payment History page.

This example shows the Payment History page.

Payment History

| Payment Method | Payment Reference ID           | Payment Transaction ID | Receipt Date | Amount Paid | Currency | First Name | Last Name | Record ID           | Record Type        |
|----------------|--------------------------------|------------------------|--------------|-------------|----------|------------|-----------|---------------------|--------------------|
| Credit card    | EPAY_20201104T0621214462357074 | 43558                  | 11/4/20      | 10,160.57   | USD      | Peter      | Skate     | STBL-2020-0051      | BLQANATAACCLASS6 > |
| Credit card    | EPAY_20201104T0649530642566803 | 43562                  | 11/4/20      | 10,160.57   | USD      | Peter      | Skate     | STBL-2020-0052      | BLQANATAACCLASS6 > |
| Credit card    | EPAY_20201104T0330223032716275 | 43550                  | 11/4/20      | 9,929.00    | USD      | Peter      | Skate     | STBL-2020-0043      | BLQANATAACCLASS6 > |
| Credit card    | CRCD_20201104T073041074Z887861 | 43570                  | 11/4/20      | 10,872.56   | USD      | Peter      | Skate     | ZPER-FEN-2020-00429 | PMTQAFEERECAL >    |
| Credit card    | CRCD_20201104T073041074Z887861 | 43570                  | 11/4/20      | 10,872.56   | USD      | Peter      | Skate     | ZPZ-SITE-2020-00215 | PMTQAFEERECAL >    |
| Credit card    | EPAY_20201104T1432518402789051 | 43617                  | 11/4/20      | 823.56      | USD      | Peter      | Skate     | ZPER-FEN-2020-00670 | PaymentBNP >       |
| Credit card    | EPAY_20201104T0950510042791445 | 43597                  | 11/4/20      | 2,860.00    | USD      | Peter      | Skate     | ZPER-FEN-2020-00635 | PaymentBNP >       |
| Credit card    | CRCD_20201104T073041074Z887861 | 43570                  | 11/4/20      | 10,872.56   | USD      | Peter      | Skate     | ZPER-FEN-2020-00271 | PMTQAFEERECAL >    |

Page 1 of 12 (1-8 of 89 items) | 1 2 3 4 5 ... 12 > | Show Default

## Reviewing Payment History

1. Select **Billing and Payment > Payment History** in the navigator.

**Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting *View Payment History* from the **I Want To** field. Public users can view only the payments that they submitted.

The Payment History page displays all of the payments received by the agency. You can search for and sort payments by:

- o Payment method
- o Payment reference ID



- o Payment transaction ID
- o Receipt date
- o Payment amount
- o Payment currency
- o Applicant first name and last name

**Note:** The payer name appears on the Payment History Details page. The payer name depends on the payment method. No name is displayed when payment is made through a trust account.

- o Record ID
- o Record type

2. Select a payment to view additional details on the Payment History Details page.

This example shows the Payment History Details page.

Payment History Details Cancel

|   |   |
|---|---|
| Payment Method: Cash<br>Payment Reference ID: CASH_20210615T1511018882Z325254<br>Payment Transaction ID: RECT-2021-10006<br>Receipt Date: 6/15/21<br>Amount Due: 300.00<br>Amount Paid: 405.88<br>Currency: USD | Receivables Receipt Status: Created<br>First Name: Peter<br>Last Name: Skate<br>Payer Name:<br>Address: |
|---|---|

Payment History Lines

| Classification | Record Type  | Record Id           | Item Description | Item Amount | Item Currency |
|----------------|--------------|---------------------|------------------|-------------|---------------|
| PMT            | PMTQACONTEST | ZPER-FEN-2021-00101 | Application Fee  | 300.00      | USD           |

Cash Drawer Lines

| Line Number | Receipt Number  | Payment Method | Amount Paid | Currency |
|-------------|-----------------|----------------|-------------|----------|
| 3           | RECT-2021-10006 | Personal check | 255.88      | USD >    |
| 2           | RECT-2021-10006 | Personal check | 100.00      | USD >    |
| 1           | RECT-2021-10006 | Cash           | 50.00       | USD >    |

Payments on Account

| On Account Reference ID       | On Account Date | On Account Amount | Currency | On Account Status |
|-------------------------------|-----------------|-------------------|----------|-------------------|
| OVFY_20210615T151120000Z5826E | 6/15/21         | 105.88            | USD      | Unapplied >       |

The Payment History Lines grid displays the transaction lines associated with the payment. You can select a payment history line to view additional details on the Payment History Line Details modal page.

The Cash Drawer Lines grid displays the cash drawer transaction lines associated with the payment. You can select a cash drawer line to view additional details on the Cash Drawer Line Details modal page.

**Note:** The Cash Drawer Lines grid does not appear for electronic payments.

The Refund History grid displays any refunds associated with the payment. You can select a refund to view additional details on the Refund Detail modal page. For more information on refunds, see [Viewing and Processing Refunds](#).

The Payments on Account grid displays any payments on account associated with the payment. You can select a payment on account to view additional details on the Payment on Account Details modal page. For more information on payments on account, see [Viewing Payments On Account](#).

### Related Topics

- Working with Fees and Payments

## Viewing Invoice History

Agency staff can view invoice history on the Invoice History page.

This example shows the Invoice History page.

Invoice History

| Invoice          | Invoice Date | Person Name    | Invoice Amount | Invoice Currency |   |
|------------------|--------------|----------------|----------------|------------------|---|
| EZE-190830-00001 | 8/30/19      | Alden Richards | 148.80         | USD              | > |
| EZE-190830-00002 | 8/30/19      | Carl Jones     | 148.80         | USD              | > |
| EZE-190830-00003 | 8/30/19      | Alden Richards | 148.80         | USD              | > |
| EZE-190830-00004 | 8/30/19      | Alden Richards | 148.80         | USD              | > |
| EZE-190830-00005 | 8/30/19      | Alden Richards | 148.80         | USD              | > |
| EZE-190830-00006 | 8/30/19      | Carl Jones     | 148.80         | USD              | > |
| EZE-190830-00007 | 8/30/19      | Alden Richards | 148.80         | USD              | > |
| EZE-190830-00008 | 8/30/19      | Alden Richards | 148.80         | USD              | > |

Page 1 of 12 (1-8 of 91 items) | < 1 2 3 4 5 ... 12 > | Show Default

## Reviewing Invoice History

1. Select **Billing and Payment > Invoice History** in the navigator.

**Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting *View Invoice History* from the **I Want To** field. Public users can view only their own invoices.

The Invoices History page displays all of the invoices issued by the agency. You can search for and sort invoices by:

- Invoice ID
- Invoice date
- Person name
- Invoice amount
- Invoice currency

2. Select an invoice to view additional details on the Invoice History Details page.

This example shows the Invoice History Details page.

The Invoice Lines grid displays the transaction lines associated with the invoice. You can select a invoice line to view additional details on the Invoice Line Detail modal page.

Click **Print Invoice** to generate a printable invoice.

**Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Public Sector Licensing and Permitting.

## Viewing and Processing Refunds

Agency staff can view refund history, process refunds, and print refunds from the Refund History page.

Agency staff initiate refund requests from the Fees and Payments page for transactions. For more information on initiating refund requests, see *Working with Fees and Payments*.

To distribute requested refunds to customers, agency staff must review and process them on the Refund History page.

This example shows the Refund History page.

## Reviewing Refund History

1. Select **Billing and Payment > Refund History** in the navigator.

The Refund History page displays all of the refunds requested or processed by the agency. You can search for and sort refunds by:

- Refund ID
- Refund Type
- Refund Method
- Refund Request Date
- Refund Amount
- Refund Currency
- Refund Status
- Refund Reason
- Refund Processed Date

2. Select a refund to view additional details on the Refund Detail page.

This example shows the Refund Detail page.

Refund Detail

Refund ID: RFND\_20210727T21418000021105E

Refund Type: Chargeback

\* Refund Method:

Refund Request Date: 7/27/21

Refund Amount: 322.08

Refund Currency: USD

Refund Status: Pending

\* Refund Reason:

Payment Method: Credit card

Payment Reference ID: CRCD\_2021072111037018492037820

Refund Processed Date:

Refund Transaction ID:

Receivables Receipt Status: None

Refund Lines

| Item Name       | Item Description | Item Refund Amount | Item Refund Currency |
|-----------------|------------------|--------------------|----------------------|
| 300100542330626 | PLANREVIEW       | 322.08             | USD                  |

The Refund Lines grid displays the items included as part of the refund. You can select a refund to view additional details on the Refund Detail modal page.

## Processing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.

**3. On the Refund Detail page, select a Refund Method.**

Select *Offline* if you are issuing a manual check for the refund, or issuing an electronic refund through a system that is not connected to Oracle Public Sector Licensing and Permitting. This is the only option available for payments that were made by check or cash.

Select *Credit Card* to credit the refund back to the credit card that was used to make the payment.

Select *PayPal* to credit the refund back to the PayPal account that was used to make the payment.

Refunds to credit cards are processed through Oracle Fusion Payments. For detailed information on setting up the integration with Oracle Fusion Payments, see *Public Sector Licensing and Permitting: Financial Integrations*.

**Note:** Cashiers processing refunds charged back to credit cards must have the Accounts Receivable Manager Segregated Role (ORA\_AR\_ACCOUNTS\_RECEIVABLE\_MANAGER\_SOD\_JOB) assigned to them. For more information on assigning roles to agency staff, see *Setting Up Agency Staff*.

**4. Click Process Refund.**

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Refunded* and enters the date and time that the refund was processed in the **Refund Processed Date** column. In addition, the process creates an accounting entry for the refund.

If you configure a template for the delivered Refund Notice communication event, processing the refund triggers the generation of a communication to the refund recipient. For more information on communication event templates, see *Setting Up Communication Templates*.

**Note:** If an error occurs before or after a refund is process, the system changes its status to *Failed*. To prevent duplicate refunds from being processed agency staff cannot process a failed refund. You must set the refund status back to *Pending* through a patch request before attempting to process the refund again.

You can process multiple partial refunds to Paypal, credit, or debit cards. Note the following for reconciliation purposes:

- The first refund (partial or full refund of the settlement amount) is posted as follow-on credit to the original settlement transaction in CyberSource.
- Subsequent partial refunds are posted as stand-alone credits in CyberSource.

## Voiding Refunds

You can void refund requests that were made in error, or for the wrong amount.

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.
3. Click **Void Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Viod* and enters the date and time that the refund was processed in the **Refund Processed Date** column.

## Printing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Refunded*.
3. On the Refund Detail page, click **Print Refund** generate a printable file for the refund in a separate browser tab.

# Viewing Payments On Account

Agency staff can view payments on account on the Payments on Account page.

This example shows the Payments on Account page.

Payments on Account

| On Account Reference ID        | First Name | Last Name | Payment Transaction ID | On Account Date | On Account Amount | Currency | On Account Status |
|--------------------------------|------------|-----------|------------------------|-----------------|-------------------|----------|-------------------|
| OVPY_20210216T1526240000Z3195E | Peter      | Skate     | RECT-5020              | 2/16/21         | 200.00            | USD      | Unapplied         |
| OVPY_20210211T2209130000Z7909E | William    | Brown     | 4                      | 2/11/21         | 10.00             | USD      | Unapplied         |
| OVPY_20210211T2211300000Z296E  | Alden      | Richards  | RECT-2021-10004        | 2/11/21         | 25.00             | USD      | Unapplied         |
| OVPY_20210215T1131520000Z1377E | Peter      | Skate     | RECT-5006              | 2/15/21         | 200.00            | USD      | Unapplied         |
| OVPY_20210215T1626510000Z433E  | Peter      | Skate     | RECT-5014              | 2/15/21         | 200.00            | USD      | Unapplied         |

# Reviewing and Refunding Payments on Account

1. Select **Billing and Payment > Payments on Account** in the navigator.

The Payment on Account page displays all of the payments on account resulting from cash drawer overpayments. You can search for and sort the payments by:

- On Account Reference ID
- First Name
- Last Name
- Payment Transaction ID
- On Account Date
- On Account Amount
- Currency
- On Account Status

2. Select a payment on account to view additional details on the Payment on Account Details page.

This example shows the Payment on Account Details page.

Payment on Account Details
Cancel [Initiate Refund](#)

On Account Reference ID OVPY\_20210211T2211300000Z296E

Payment Reference ID CASH\_20210211T221105005Z396669

Payment Transaction ID RECT-2021-10004

First Name Alden

Last Name Richards

Amount Due 225.00 USD

Amount Paid 250.00 USD

On Account Date 2/11/21

On Account Status Unapplied

On Account Amount 25.00 USD

Refund Request Date

Refund Status

Refund Amount

Refund ID

Receivables Receipt Status ORA\_NONE

3. If the payment on account hasn't been refunded yet, the **Initiate Refund** button is available. Click it to initiate a refund for the overpayment. The **Refund Status** changes to *Pending*.

4. Access the Refund History page to process the pending refund. For more information, see [Viewing and Processing Refunds](#).
5. Confirm that the payment's **On Account Status** shows as *Refunded* on the Payments on Account page. This example shows the status of a payment on account updated to Refunded.

Payments on Account

| On Account Reference ID        | First Name | Last Name | Payment Transaction ID | On Account Date | On Account Amount | Currency | On Account Status |
|--------------------------------|------------|-----------|------------------------|-----------------|-------------------|----------|-------------------|
| OVPY_20210216T1526240000Z3195E | Peter      | Skate     | RECT-5020              | 2/16/21         | 200.00            | USD      | Unapplied         |
| OVPY_20210211T2209130000Z7909E | William    | Brown     | 4                      | 2/11/21         | 10.00             | USD      | Unapplied         |
| OVPY_20210211T2211300000Z296E  | Alden      | Richards  | RECT-2021-10004        | 2/11/21         | 25.00             | USD      | Refunded          |
| OVPY_20210215T1131520000Z1377E | Peter      | Skate     | RECT-5006              | 2/15/21         | 200.00            | USD      | Unapplied         |
| OVPY_20210215T1626510000Z433E  | Peter      | Skate     | RECT-5014              | 2/15/21         | 200.00            | USD      | Unapplied         |

## Creating Oracle Receivable Receipts

Run the Create Oracle Receivables Receipt process to generate receipts in Oracle Receivables for each payment line associated with a payment processed in Public Sector Licensing and Permitting.

The process assigns a receipt method and remittance name to each receipt based on the receipt options defined for each payment method at the agency level. It assigns a receivable activity name based on the following hierarchy:

1. If a receivable activity name is defined for a fee item and record type then the process assigns that value when creating receipts for all payment history lines that have the same fee item and record type. It ignores receivable activity names defined at the record type or agency level.
2. If a receivable activity name is defined for a fee item and all record types then the process assigns that value when creating receipts for all payment history lines that have the same fee item. It ignores receivable activity names defined at the record type or agency level.
3. If a receivable activity name is defined for a record type then the process assigns that value when creating receipts for all payment history lines that have same record type. It ignores receivable activity names defined at the agency level.
4. If a receivable activity name is not defined by record type or fee item then the process assigns the receivable activity name defined at the agency level.

The process uses the payment reference ID to create the receipt numbers in Oracle Receivables. It strips out the four-letter and underscore prefix, and appends an underscore and number for each payment history line associated with the payment reference ID. For example, for the payment reference ID DRCD\_20201029T143300767Z640574, which includes two payment history lines, the process would pass two receipt numbers: 20201029T143300767Z640574\_1 and 20201029T143300767Z640574\_2.

If there's a problem with your integration setup for a payment, the Create Oracle Receivable Receipt process gives it a **Receivables Receipt Status** of *Error*. Once you correct the source of the error, you can run the process again.

Access the Create Oracle Receivables Receipt page from the navigator by selecting **Billing and Payment > Oracle Receivables Receipt**.

To initiate the process, access the Create Oracle Receivable Receipt page by:

- Selecting **Billing and Payment > Oracle Receivables Receipt** in the navigator.
- Clicking **Schedule New Process** in the Process Monitor, and selecting *Create Oracle Receivable Receipt*.

## 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><br/>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><br/>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><br/>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><br/>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><br/>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><br/>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.

# 14 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><br/>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><br/>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><br/>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><br/>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><br/>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><br/>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  |
|---|--|
| <b>Mapping Name</b>                                       | Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see <i>Setting Up Data Format Exchange Maps</i> . |
| <b>All Open Periods</b>                                   | Select to include journals for all open accounting periods.  |
| <b>Specify Dates</b>                                      | Select to include journals for a specific accounting date range.   |
| <b>Accounting Date From</b> and <b>Accounting Date To</b> | Specify the range of accounting dates for which you are exporting journal entries.   |
| <b>Select Ledgers</b>                                     | Select the ledgers for which you want to export journal entries.   |

### Scheduling the Process

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

| Page Element     | Description  |
|------------------|--|
| <b>Frequency</b> | 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><br/>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><br/>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><br/>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><br/>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><br/>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><br/>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](#).



# 15 Working with Processes

## Using the Process Monitor

The Process Monitor enables users to initiate and manage processes for Oracle Public Sector Licensing and Permitting. This example shows the Process Monitor page.

Process Monitor

Schedule New Process

Last 12 hours ▾

| Name                   | Process ID | Status    | Submitted By | Submission Time    | Scheduled Time     | Actions  |
|------------------------|------------|-----------|--------------|--------------------|--------------------|--|
| Export Journals to ERP | 14336      | Running   | SYSTEM_ADMIN | 5/8/19 3:08 PM PDT | 5/8/19 3:08 PM PDT | <input type="button" value="i"/> <input type="button" value="&gt;"/> |
| Generate Accounting    | 14306      | Succeeded | SYSTEM_ADMIN | 5/8/19 3:01 PM PDT | 5/8/19 3:01 PM PDT | <input type="button" value="i"/> <input type="button" value="&gt;"/> |

## Scheduling a New Process

1. Select **Common > Process Monitor**.
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the *Generate Accounting* process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.

**Note:** Processes can be run immediately or scheduled to run at a specific time. If you want to schedule a recurring process beyond 20 years into the future, the **End Date** must have a four-digit year. This requires updating the date format defined in the regional preferences. From the account menu, select **My Preferences**, click **View Advanced Preferences**, and select **Regional**. On the General Preferences: Regional page, you can update the **Date Format** to use a four-digit year.

6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

## Managing Processes

Select **Common > Process Monitor**.

The Process Monitor page displays information for each process in the following sortable columns:

- **Name**
- **Process ID**
- **Status**
- **Submitted By**
- **Submission Time**
- **Scheduled Time**

**Note:** The **Submission Time** and **Scheduled Time** columns use the time zone specified in the user's preferences, not the time zone for the agency.

Click **Filter By** to filter the displayed process information by *Name*, *Process*, and *Submission Time*.

You can manage processes using the following page elements:

| Page Element             | Description   |
|--------------------------|---|
| <b>Actions</b>           | Click the icon in this column to select one of the following actions: <ul style="list-style-type: none"><li>• <i>Put on Hold</i></li><li>• <i>Release Process</i></li><li>• <i>Cancel Process</i></li></ul> |
| <b>View More Details</b> | Click to view additional information about the process on the Process Details page.   |

# 16 Using the Digital Assistant

## Overview of Digital Assistant

Create your own digital assistant from scratch using your Oracle Digital Assistant instance and configure its parameters to suit your requirement before making it available for your users.

Create and add skills to your digital assistant. You can also use the Oracle delivered sample skills and re-configure its parameters, or clone the skill for the digital assistant you create.

Enable your digital assistant to provide generic information about processes or answer specific questions about your offerings, and enlist your own set of frequently asked question with answers.

## Asking Details

The delivered digital assistant skills, for example, facilitates responses and recommendations to questions raised by an anonymous user regarding the permitting process:

- With the PERMIT SEARCH skill, the digital assistant can access information from the Permit implementation and list the permits that match one of the search parameters – *Permit Number*, *Parcel ID*, and *Street*. Users can also review the permit detail page, if they want to look into a permit they just searched.
- With the PERMIT RECOMMENDATIONS skill, the digital assistant can access information from Oracle Intelligent Advisor and list permit recommendations. The skill prompts the user with questions from the Oracle Intelligent Advisor questionnaire and retrieves a list of recommended permits based on the user's responses to the questions.

For details on configuring your digital assistant for use, such as intents and the dialog flow, see the documentation [Configure for Use in a Digital Assistant](#).

## Asking Questions

Your digital assistant can store a list of questions and answers to be available as Frequently Asked Questions (FAQs) regarding the processes your agency follows.

The content for the FAQs are entered in a spreadsheet and attached to the digital assistant. The Oracle delivered spreadsheet can be updated with information from your knowledge-base.

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).





# 17 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 >          |

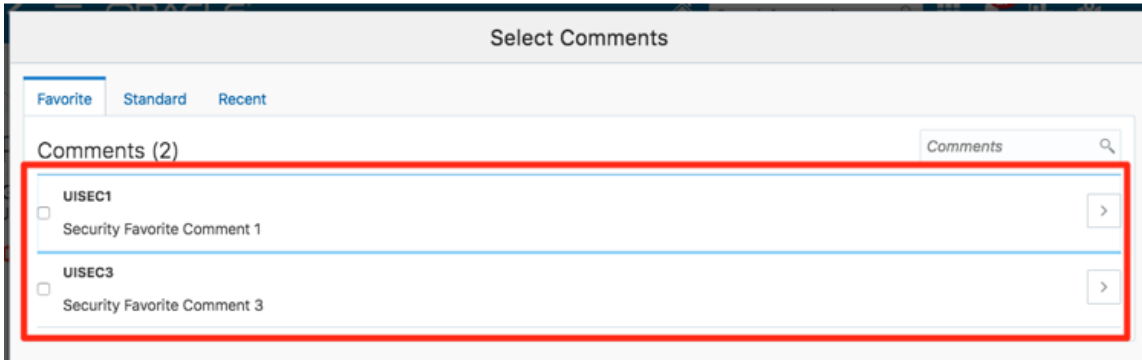
Page | 1 | of 22 (1-11 of 240 items) | < | 1 | 2 | 3 | 4 | 5 | ... | 22 | > | ✕

| 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.<br><br>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.



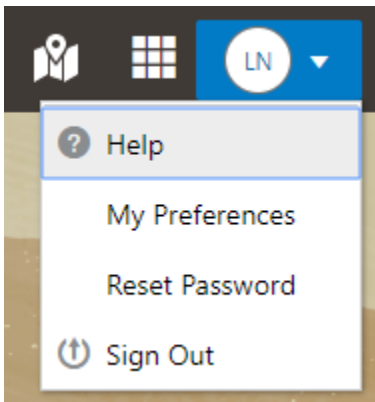
| Target    | Key         | Description   |
|-----------|-------------|---|
| List Item | F2          | Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.  |
|           | Esc         | Exits Actionable mode.  |
|           | 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 |    |    |    |    |    |

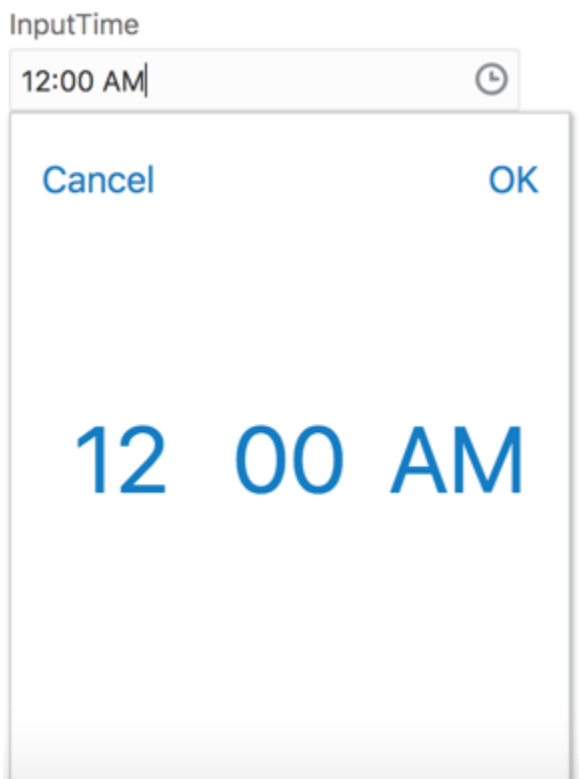
Today

| 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.

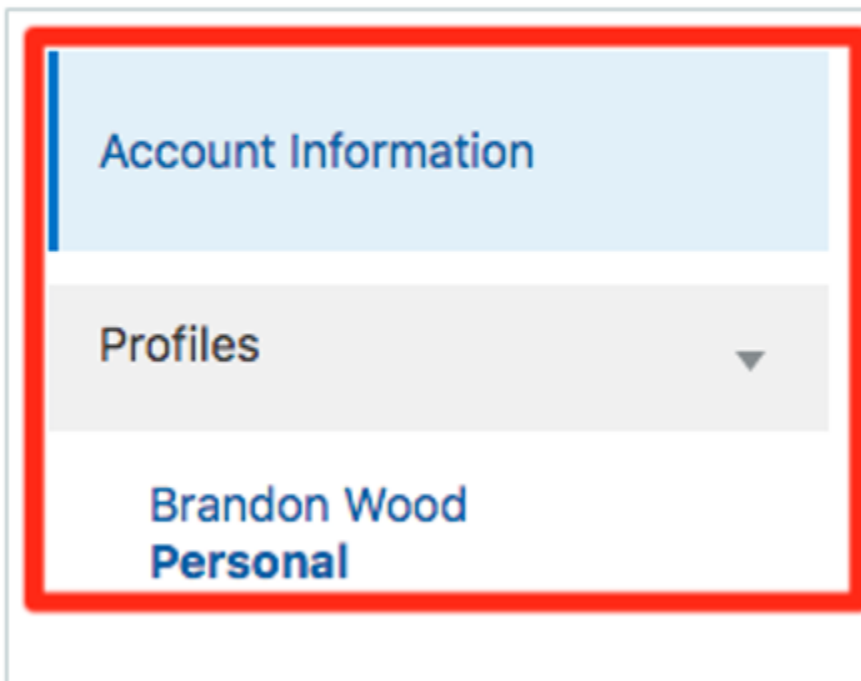
| Key   | Description  |
|---|--|
| Space or Enter  | Toggle disclosure state.   |
| Tab   | Navigate to next collapsible header and if none then the next element on page.         |
| Shift+Tab   | Navigate to previous collapsible header and if none then the previous element on page. |
| Up Arrow or 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.   |