

Oracle Permitting and Licensing

Using Business Licenses

22D

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Author: Oracle Permitting and Licensing User Assistance

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). (if videos) Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

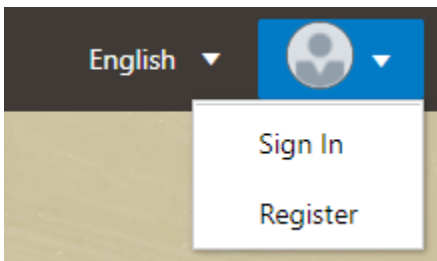
Thanks for helping us improve our user assistance!

2 Managing Public Users

The Public User Registration Process

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

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



Here is a summary of the registration process:

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

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

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

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

Register

* Account Use Personal Business

Hide my contact information from public view

Salutation

* First Name

* Last Name

Your email address is your user name.

* Email Address

* Confirm Email Address

Country US

Postal Code

[Don't know](#)

Phone Ext.

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

IVR Access Code

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

[Register](#)

Entering Registration Information

Users enter the following registration information.

Page Element	Description
Account Use	Indicates whether this is a personal account or a business account.
Are You a Contractor?	Indicates whether the account holder is a contractor. This switch is visible only if the user selects Business as the account use. The user's contractor status is associated with the business profile that is created during the registration process. Registering as a contractor doesn't affect processing nor does it add the user to the agency's contractor records.
Add License	Used to provide details of a contractor license held by a business. This button is visible only if the user selects Business as the account use. License information is required if the user self-identifies as a contractor. License information is optional for other businesses. Clicking this button opens the Contractor License Details page, which includes these fields: License Type, License Number, Issued On, and Expiration Date.

Page Element	Description
	<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>Note: Depending on the settings on the Public User Setup page, a user's self-identification as a contractor might need to be verified by agency staff. Verification requirements do not affect the registration process.</p>
<p>Hide my contact information from public view</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>Salutation</p>	<p>A title such as <i>Ms.</i> or <i>Mr.</i> that is used to address the person.</p> <p>This field is optional.</p>
<p>First Name and Last Name</p>	<p>The user's name, which appears on the account profile.</p>
<p>Business Name</p>	<p>This field is visible only if the Account Use field indicates that this is a business account. The business name entered here is associated with the profile that the registration process creates.</p>
<p>Email Address and Confirm Email Address</p>	<p>The user's email address that will be associated with their account. Enter the email address again to confirm.</p> <p>Note: The user's email address is their user name or user ID. There is no separate user name or user ID to sign in.</p> <p>After the user submits registration information, the system sends an email to this address. The email contains a link that the user needs in order to complete the registration process.</p>
<p>Address Fields</p>	<p>The user's address that will be associated with their account.</p> <p>The Country field displays <i>US</i>.</p> <p>As the user enters a Postal Code, the type-ahead list shows values that include appropriate city and state combinations. After the user selects a value, the city and state appear as read-only fields, and two address fields appear so that the user can enter the rest of the address.</p> <p>A user who doesn't know the postal code can click the Don't know link to display a full set of address fields.</p>
<p>IVR Access Code (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 Managing Public User Accounts.</p> <p>This field appears only if your agency enables IVR access codes on the Public User Setup page. See Setting Up Public Users.</p>
Phone	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 Permitting and Licensing 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 Oracle Permitting and Licensing 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 Oracle Permitting and Licensing 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 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.
- **Attachments:** documents that have been uploaded to the account.

Attachments can be added to either the account or the account profile. The list of attachments for the account displays both account attachments and profile attachments.

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

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

Accessing Public User Account Information

Registered public users have self-service access to manage their accounts. Agency staff with appropriate permissions such as system administrators can also update account and profile information for public users.

Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

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

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

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

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

Account Management Navigation for Registered Public Users

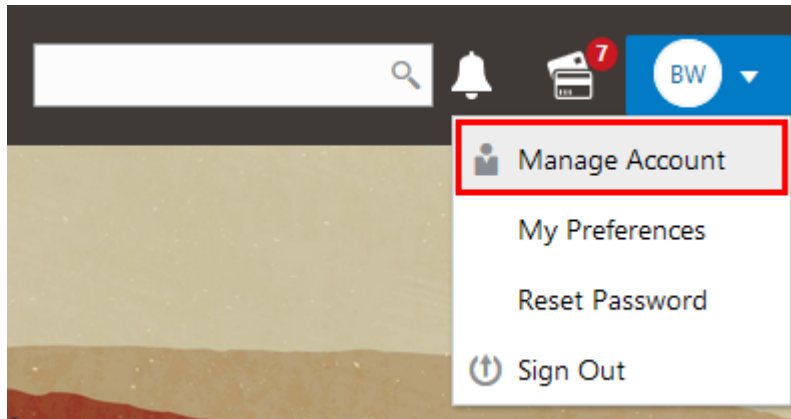
To access self-service account management functionality, a public user who has signed in follows these steps:

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

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

A drop-down menu appears.

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



3. Select **Manage Account**.

Managing Public User Accounts

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

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

Security Details for Managing Public User Accounts

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

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

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

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 Permitting and Licensing*.

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

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

- 5. To view or update additional information:

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

The Additional Information page appears.

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

4. To add a new attachment:

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

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

5. To view or modify attachment information:

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

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

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

You are prompted to confirm the deletion.

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

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

Viewing the Account Profile

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

Selecting the profile name in the left frame causes the right frame to display summary information about the profile. This information is broken into sections. Clicking a section opens a detail page with complete information.

To view the summary information for the profile:

1. Access the Manage Account page.
2. Select the profile name in the left frame.
3. Review the following summary information:

Profile Section	Information Displayed
Profile Basics	The profile type: <i>Personal</i> or <i>Business</i> .
Profile Information	For the business profile type only. No summary information appears.
Contact Information	The number of contact methods for the profile.
Contacts	The number of contacts for the profile.
Licenses	The number of licenses for the profile, and whether the profile has contractor status. The self-reported contractor status appears, but you must access license details to see if the status has been verified.
Conditions	The number of active conditions for the profile. Although the details for this section includes both active and resolved conditions, the count in the summary includes only active conditions.

Updating Profile Basics

To update profile basics:

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

Page Element	Description
Profile Name	The identifying name for the profile. This name appears in the page header and on the Manage Account page. The name for the profile that is created during the registration process is the public user's first and last name. This name is truncated if it's longer than 60 characters.
Default	The profile that gets created during the registration process is the default profile. The check box is read-only.
Profile Type	Displays either <i>Personal</i> or <i>Business</i> based on the account use selected during registration. You can't change the profile type.
Status	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
Are You a Contractor?	To indicate the contractor status, select either <i>Yes</i> or <i>No</i> .
Verification Status	<p>This field is visible if the contractor status is <i>Yes</i> and the <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>Note: Although public users and agency staff can both see the verification status, only agency staff can update the value.</p>

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

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

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

7. Click **Save** or **Cancel** to return to the Licenses page.
8. Click **Save** or **Cancel** to return to the Manage Account page.
Saving on the Licenses page saves changes to the **Are You a Contractor?** and **Verification Status** fields. Changes to licenses are saved from the License Details page.

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

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

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


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. Update the verification status for individual requests on the Pending Verification Requests page:

This example illustrates the Pending Verification Requests page.

Pending Verification Requests

Rita Johnson([REDACTED]@ [REDACTED])



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

Managing Verification Requests

To find and manage pending verification requests:

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

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

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

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

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

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

Page Element	Description
Profile Name	Displays the profile that is associated with the data to be verified.
Type (type of request)	Explains what type of information must be verified. Values include: <ul style="list-style-type: none"> ○ <i>User is a contractor</i> ○ <i>User added or updated license</i>
Verification Details	Displays identifying details for a license. License details include the license number, license type, the date issued, and the expiration date.

Page Element	Description
	This column is blank for requests to verify a user's contractor status.
Verification Status	Because this page lists only pending verification requests, all rows initially have the status <i>Pending Verification</i> .

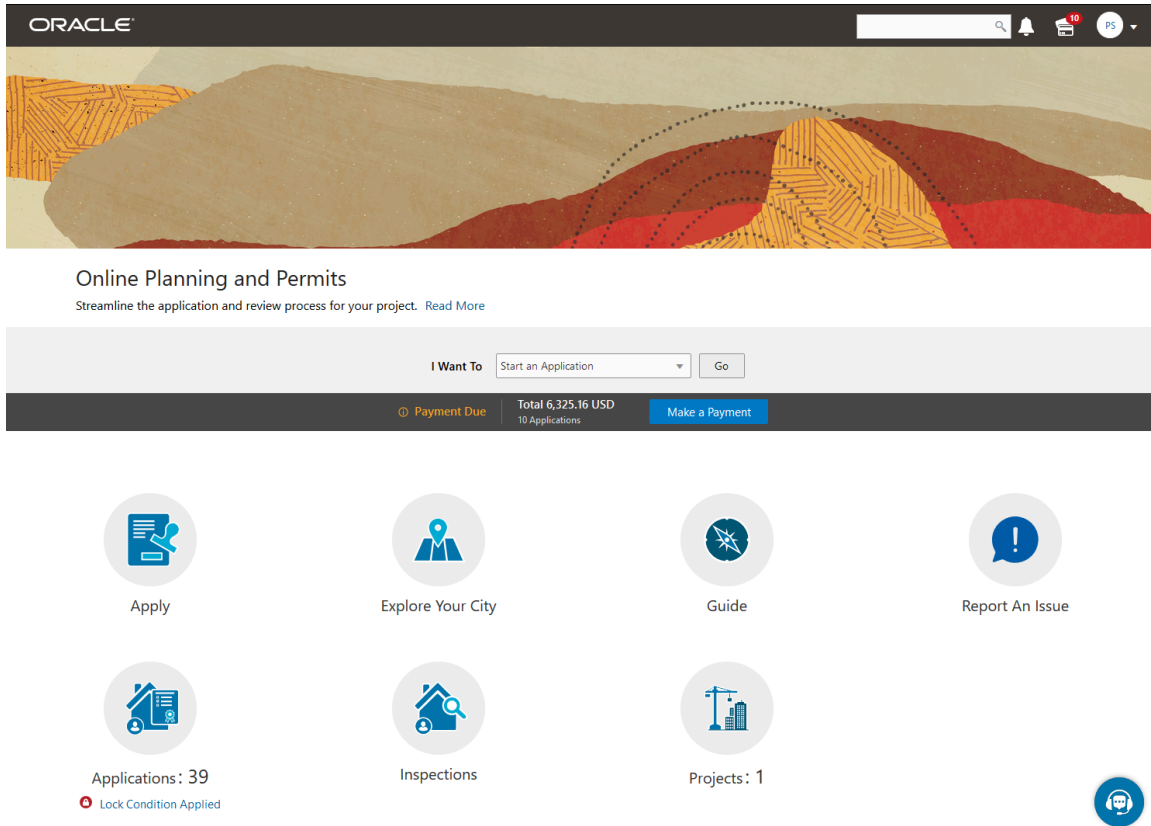
5. Update the **Verification Status** for any requests where the verification process is complete.
Select either *Verified* or *Verification failed*, depending on whether you were able to verify the information.
6. Click the **Save** button.

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
Estimate Fees	Provides access to the Estimate Fees page, where the user can chose an application type and estimate fees for an application.
Guide	<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 Setting Up Agencies</p>
Explore Your City	Provides access to a map where the anonymous user can search for and view property details, including applications related to the property.

Tiles on the Registered User Landing Page

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

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

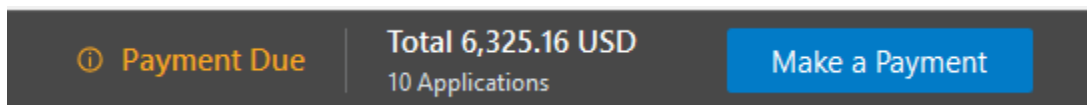
Menu Link	Description
Report an Issue	<p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.</p> <p>See Reporting Issues.</p>
Applications	<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 Show All Statuses 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>
Inspections	Displays a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.

Menu Link	Description
	The number of scheduled and requested inspections appears in the tile label.
Projects	<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>
Businesses	<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>
Business Licenses	<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 Show All Statuses 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*.

3 Applying for a Business License

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

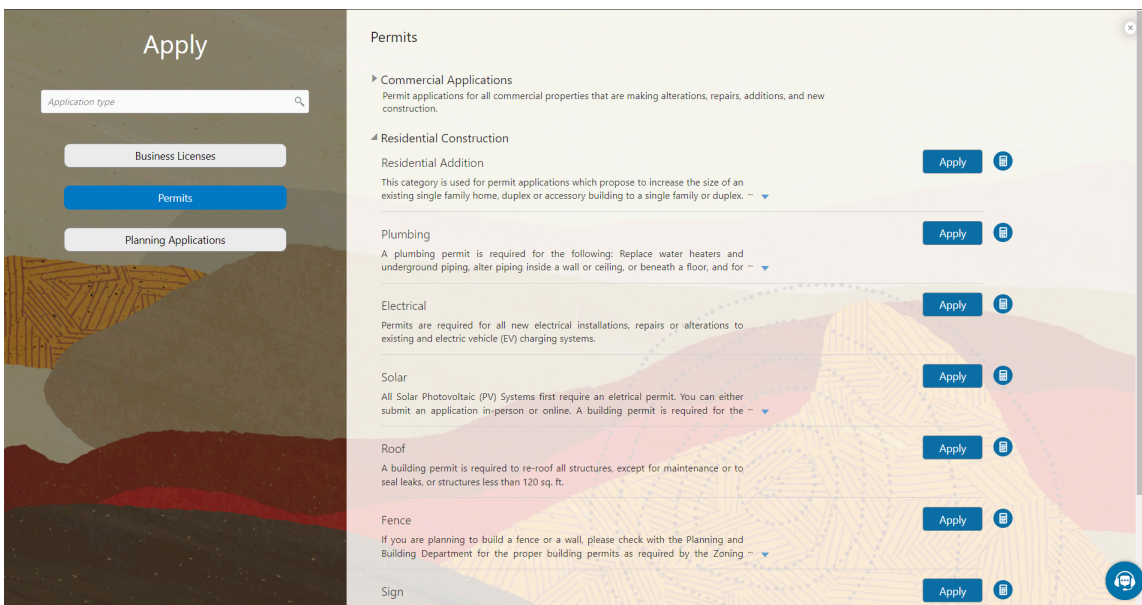
The Apply page offers these options for finding application types:

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

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

Browsing for Application Types

To browse for application types:

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

Using a Guided Questionnaire to get Application Type Recommendations

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

To find application types using a guided questionnaire:

1. Click the **Guide** button to open the guided questionnaire.
This button appears only if the agency has configured an Oracle Intelligent Advisor policy for recommending application types.
2. Step through the questionnaire.
At the end of the questionnaire, the guide will recommend application types and provide an option to save the recommendations.
3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

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

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

An anonymous user follows these steps to save the recommendations:

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

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

Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

1. Sign in.

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

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

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

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

Estimating Fees

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 a fee schedule 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 schedule associated with it. You can also search for specific applications. Click the **Estimate** button to open a simplified intake form.
- Registered public users and guest or anonymous 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 schedule 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.

Close Application

Step 1 of 5: Applicant

Save Previous Next

New Swimming Pool

Applicant

First Name Peter

Middle Name

Last Name Skate

Country US

* Zip Code 94080

City of Los Angeles, US-CA

* Address Line 1 466

Address Line 2 William Street

Phone 1 (541) 754-3010 Ext. 3256

Email

Step 1: Applicant

Step 2: Property Information

Step 3: Pool Details

Step 4: Review

Step 5: Fee Summary

Single-Page View

Titulation MR.

Suffix

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 before accessing, filling out, and submitting an application.

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.

Grids

Some intake forms contain one or more grids, which are page controls that enable you to collect and display data in a tabular fashion, using rows and columns.

The screenshot shows the Oracle application interface. At the top, there is a navigation bar with the Oracle logo, a home icon, a search bar, a notification bell, a bar chart icon, a location pin icon, a grid icon, and a user profile icon labeled 'JB'. Below the navigation bar, there is a toolbar with buttons for 'Close Application', 'Status: draft', 'Step 2 of 3: Page 3', 'Save', 'Previous', and 'Next'. The main content area is titled 'Building Permit' and contains a section for 'Project Items'. This section has a plus sign icon to add items and a 'Filter By' dropdown menu set to 'All columns' with a search input field containing 'Enter a value'. Below the filter is a table with two columns: 'Permit Item' and 'Project Item Description'. The table currently displays 'No data to display.'

To add data to a grid:

1. Click **Add** (the plus sign).

A pop-up dialog box appears where you can enter your data.

2. Select or enter all the required data for the grid.

A grid can contain many fields (columns) to capture data of different types, such as dates, numbers, text, drop-down lists, check boxes, and so on. The number and types of fields depends upon the intake form designed by the agency.

Note: Some fields are configured to be read-only and can't be edited.

3. Select **Add another row** to continue to enter data when adding multiple rows.

The screenshot shows the Oracle Building Permit application interface. At the top, there is a navigation bar with the Oracle logo, a home icon, a search bar, a notification bell, a bar chart icon, a location pin icon, a grid icon, and a user profile icon labeled 'JB'. Below the navigation bar, there is a status bar with a 'Close Application' button, 'Status: draft', 'Step 2 of 3: Page 3', a 'Save' button, and 'Previous' and 'Next' navigation buttons. The main content area is titled 'Building Permit' and contains a 'Project Items' section with a plus sign icon and a 'Filter By' dropdown menu set to 'All columns'. A 'Project Items' dialog box is open in the foreground, containing a 'Permit Item' dropdown menu with 'Demolition' selected, a 'Project Item Description' text input field with 'Gut kitchen and bathrooms.' entered, and a checked 'Add another row' checkbox. The dialog box also has 'Cancel' and 'OK' buttons.

4. Click **OK**, after you've added all the required information.
5. Click **Save**.

Note: Each new row added to a grid is assigned a sequential row number automatically.

Note: For grids with many rows, you can use the filtering option. Select a column to sort by from the **Filter By** dropdown list, and add a column value, if needed in the filtering value field.

Applicant

All applications include this section, which is used to identify the applicant. The applicant is also automatically added to the Contacts section.

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.

Attachments

The Attachments section provides a grid where you can upload files, such as documents or images. Depending on the agency setup, the Attachments page may display the types of documents that are required for an application type and the stage in the application process at which they are required. Click **Upload** to attach the specified document in the Required Documents list. This list is informational only. The applicant selects the document properties such as category and subcategory during upload and the file appears in the Attachments grid in the application. After you submit the application, the files that you added appear in a list on the Attachments page in the application's detail pages.

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.
- The applicant is automatically added as the primary contact in the Contacts section, but you can add or select a different primary contact. You can also change the contact type, but you can't remove the applicant contact. You can also change the primary contact in the application details after submission.
-
-
- 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 after it's been submitted.
- 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](#).

Business license applications:

- On the Contact Details page for new contacts, system administrators can 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, system administrators can 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.

Contractors

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.

Agencies sometimes add extra validations when you add contractors to make sure that contractor licenses meet permit requirements. The license requirements for a permit can include a specific license type, classifications, and insurance attributes. Validations can also check the license expiration date. Conditions applied to a contractor license may also apply restrictions to a transaction.

CAUTION: You may not be able to submit the application when contractor validations fail on the permit or a condition is applied to the license, depending on how the agency sets up the license validations and conditions, respectively.

For more information, see [Adding Licenses to an Application Form](#).

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

Registered users 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 registered users can review and select them before making a payment. Agency staff have the Make Payments page to process payments for multiple applications on behalf of registered users.

The Make a Payment page lists the applications associated with the logged in user and are due for fee payment. Registered users can review the details, select items, and make payment.

Registered users include applicants and contacts. Contacts can be primary and others. For more information, see [Managing Transactions](#). For business license transactions, see [Managing Business License Transactions](#).

Registered users can also make payments from an application's Fee and Payments page.

Agency staff can use the **Make Payments** tile on the Agency Springboard to access the Make Payments page. They can process payments for multiple applications from the Make Payments page. They can make payments on behalf of registered users from the agency's Transactions list page. In such cases, they see the applications on their Applications page, as well as on the Make 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* and *Managing Business License 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

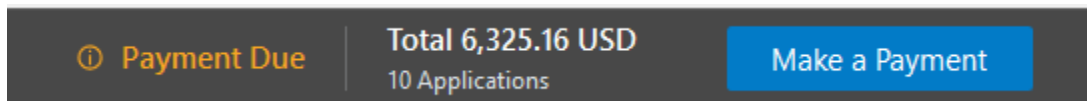
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

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.

Registered Users - Making Payments

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 registered users 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.

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

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

Page Element	Description
Trust Accounts	<p>Turn on this switch to select a trust/deposit account from the Account drop-down menu, to make the payment.</p> <p>Note: When a trust/deposit account is selected, only those applications are displayed for which payment can be made using the selected trust/deposit account.</p>
Select All/Deselect All	<p>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.</p> <p>The Total Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.</p>
Application	<p>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.</p> <p>The type of application, such as <i>Residential Addition</i>, appears under the application number.</p> <p>If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see Applying Conditions to Applications.</p>
Property	View the location of the property for the application.
Description	View a description of the application.

Page Element	Description
Primary Contact	View the primary contact for the application. For information on how to add contacts and change the primary contact, see <i>Working with Application Contacts</i> .
Amount	View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.
	The Balance Changed alert indicates the fees for the application have been adjusted. Adjusted fees are updated automatically before checkout processing.
Cancel	Click to cancel and go back to the home page.
Continue	Click to access the Trust Account Payment page to continue with the payment.

Registered 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*.

Agency Staff - Making Payments

Agency users have a **Make Payments** tile on their Agency Springboard page. Using this tile they can access the Make Payments page to make payments for single or multiple applications on behalf of registered users.

For an agency user to make payments on behalf of registered users:

1. From the Agency Springboard, select the **Make Payments** tile.
2. On the Select Customer pop-up window, select a customer.

Note: When a customer is selected, the system loads the payment cart of the selected customer and displays all transactions that the customer can make as a registered public user.

3. On the Make Payments page, select the checkboxes to choose the applications to make payments.
4. Click Continue.
5. Review the Checkout page, which lists the different payment methods available, such as cash or credit card.
6. 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.

Page Element	Description
Customer Name	Displays the name of the customer currently chosen to make the payments for.

Page Element	Description
Change Customer button	Click to choose a different customer.
Select All/Deselect All	Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied. The Total Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.
Application	Each item on the page is identified by the application number. Click the application number to open the overview page with the application summary and access to details. The type of application, such as <i>Residential Addition</i> , appears under the application number. If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see Applying Conditions to Applications .
Property	View the location of the property for the application.
Description	View a description of the application.
Primary Contact	View the primary contact for the application. For information on how to add contacts and change the primary contact, see Working with Application Contacts .
Amount	View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.
Cancel	Click to cancel and go back to the home page.
Continue	Click to access the Trust Account Payment page to continue with the payment.

Copying an Application

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

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

To copy an application:

1. Select the **Permits, Planning Applications** or **Business License Transactions** tile on the Agency Springboard.
2. On the Transactions page, find the permit, planning application, pre-application, or business license application that you want to copy. To copy a consultation application, see [Working with Consultation Outcome](#).
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, review the details and make any changes to the field values:

Page Element	Description
Copy From	Displays the application ID and the application type of the source application.

Use the **Copy To** section to enter values:

Page Element	Description
Applicant	Search for and select a different applicant if you don't want the source applicant to be the applicant for your new application. The source applicant is the default selection. Note: Registered public users can't change the applicant.
Application Type (enterable)	Select the application type for the new application. The application type from the source application is the default value.
Description	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.

The options displayed in this section are determined by the source application type and the new application type:

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
Application Details	Select this check box to copy application data from predefined field groups other than the ones that are controlled by separate check boxes (that is, field groups other than property, contacts, contractor, authorized agents, and business information). If the new application type is different from the source application type, copying only occurs for sections that exist in both the application types.
Contacts	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>Contractor</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"> ○ If a public user copies an application, and the user's account profile indicates that the profile is for a contractor, the authorized agent data is copied. ○ If agency staff copies from a planning pre-application to a regular application, the applicant information and authorized agent data is copied. ○ If agency staff copies from a regular application to another regular application, the applicant information is not copied, and therefore the authorized agent data isn't copied. <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>Property</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>
<p>Business Information</p>	<p>Select this check box to copy the business information from the source application.</p> <p>Business owners are necessarily copied to the new application. You can turn off the Business Location check box if you want to add a new location to your application.</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 that displays the types of fees and the total fees associated with the new application.

The Contact Details section displays the contact information that is copied over from the source application. If you selected a new applicant in the *Copy To* section, then the contact list in the new application adds the new applicant as the primary contact. If you retained the source applicant, the contact list adds the source applicant

as the primary contact. The primary contact has the same application access as the applicant regardless of the access defined for their contact type.

The copied business license application will be of activity type Origination regardless of the source business application activity type—Amendment or Renewal.

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.

4 Using the Agency Springboard and the Task List

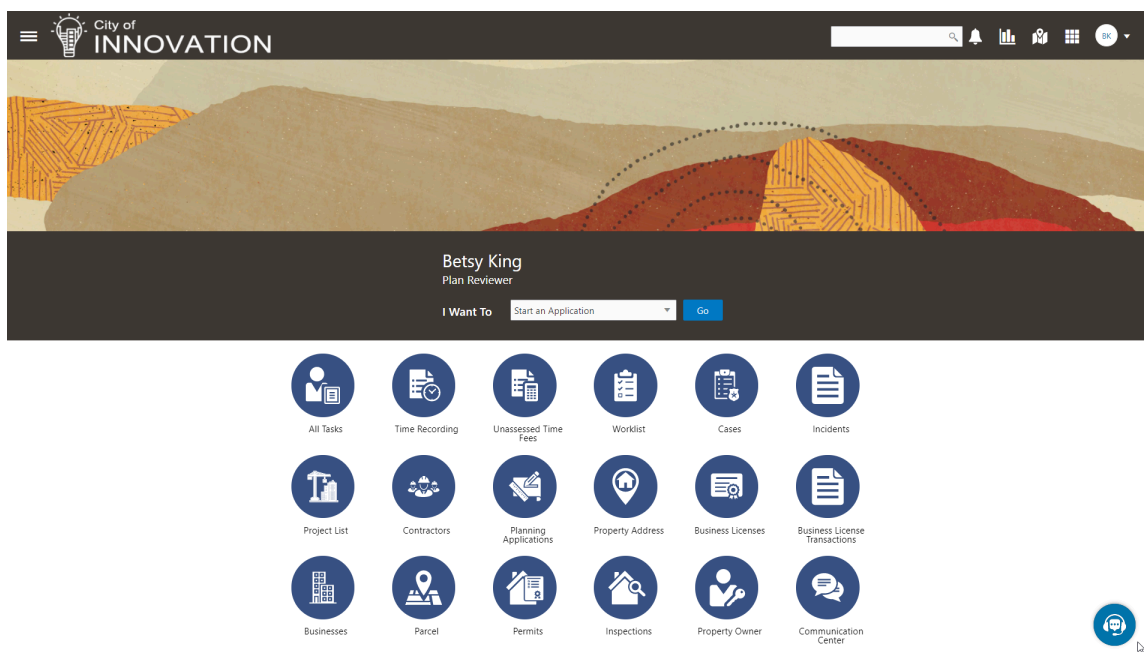
Using the Agency Springboard

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

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

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

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









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



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

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

Alerts

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

Quick Actions (I Want To)

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

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

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

Tiles

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

Managing Tasks

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

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

- 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 PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Business Analyst PSC Building Inspector PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Task Management Worklist	Access the task management worklist.	PSC Inspections Supervisor PSC Building Inspector PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

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

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 Permitting and Licensing](#).

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
Fees/Conditions	If any fees are due or conditions are applied, icons indicating this appear in the left column of the grid. See the section, "Viewing Additional Transaction Information" for more information.
Task Name	Identifies the nature of the task to be performed. Values include <i>Application Acceptance</i> , <i>Permit Completion</i> , and so on.
Task ID	The unique identifier of the task.
Application ID	The application ID for the individual submitted transaction being worked, such as the permit ID.
Application Type	The type of application being worked, such as <i>Solar Permit</i> , <i>Building Permit</i> , and so on.

Page Element	Description
Status	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.
Assigned To	Displays to whom the task is assigned.
Assigned Date	Displays the date on which the task was assigned.
Actions	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:
 - o **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.
 - o **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.
 - o **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.

5 Managing Business License Applications

Managing Business License Transactions

Business license transactions are specific activities related to a business license. Transactions can be pre-license consultations, or they can be activities related to the actual license, such as the license origination activity. Business license transactions are distinct from the actual business license that gets issued.

Use the Transactions page to view summary information about activities such as consultations and license origination. Access the Transactions page by clicking the **Business License Transactions** tile on the Agency Springboard.

You can access the transactions list page on mobile devices as well as on a laptop or desktop computer. The layout changes based on the device you are using.

Use the Transactions page to:

- View a summary of business license transactions.
- Access details about a business license transaction.
- Apply for a business license on behalf of an applicant.
- Copy an existing business license application, permit, planning application, or a pre-application into a new application.
- Manually enter fee payments on behalf of an applicant.

Note: This topic discusses only business license transactions. For information about the other types of transactions that appear on the Transactions page, see *Managing Transactions*.

Registered User View of Business License Transactions

Registered users can access a list of their own business license transactions. The public-facing list shows the same information as the agent-facing list except that public users don't see the name of the assigned agent.

From the registered user landing page, a registered user accesses the transaction list by clicking the **Applications** tile or by using the *Go to Applications* action in the quick actions drop-down list.

The Applications page has tabs for viewing different types of transactions. The Business Licenses tab lists the user's business license transactions. Clicking a list item displays details for a specific transaction.

Overview of General Page Controls

The Transactions page includes separate tabs for business license activity, permits, and planning applications. Although the transaction data varies depending on the transaction type, the following page elements appear above the transaction list and are common to all transaction types.

Note: Grids are rendered in either a condensed or expanded format based on the FSM option selection made by the agency during implementation. On the Transactions page, each agency staff member can now personalize expanded grids to display information in a manner that suits their own requirement. See *Personalizing Grid Displays*.

Page Element	Description
Business Licenses, Permits, Planning Applications, and All	Click these tabs to choose which types of transactions to list.
Apply	Click to access the Apply page, where you choose an application type and start a new application on behalf of an applicant. For more information, see <i>Choosing an Application Type</i> and <i>Completing an Application</i> .
Download	Click to export the list to a .csv file.
<div data-bbox="115 625 391 688" style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;"> Last Updated ▼ </div> <div data-bbox="115 730 391 793" style="border: 1px solid #ccc; padding: 2px;"> Last 30 Days ▼ </div>	Click to select an option to filter applications based on when the application was last updated, submitted, created, or to show all data. If you select Show All Data , the page will show all records in the system without applying any filters. Click and select a period to apply the above filter – last 14, 30, or 60 days. If you use the Date Range option, you can select dates from the date picker and click the Refresh button to list the transactions for the selected period. This filter is not available when Show All Data is selected. Last Updated and Last 30 Days are the default options. Once you make the changes, your settings will remain throughout your online session and reset to the default for the next session. You can have separate settings for Business Licenses, Permits, Planning Applications, and All pages.
Show All Statuses	Use this switch to filter the list based on transaction status: <ul style="list-style-type: none"> • If the switch is off, the list includes only active transactions. This is the default setting if any active transactions exist. • If the switch is on, the list includes transactions in all statuses, including active, inactive, canceled and withdrawn applications. This is the default setting if there aren't any active transactions.
Search	Use keywords to search for transactions. For example, you can search using an application ID or applicant name. To search on a date, use the date format MM/DD/YYYY.
Filter By	Apply filters to display transactions 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. <div style="border-left: 2px solid #c00; padding-left: 10px;"> CAUTION: When defining filters, if you select Creation Date or Submission Date, then ensure that the Show All Records option is selected from the Quick Filter described above. </div>
Sort By	Here are some of the sorting options: <ul style="list-style-type: none"> • <i>Application</i>: The application ID. • <i>Type</i>: The application type. • <i>Status</i>: The activity status (not the license status). • <i>Creation Date</i>: The date when the application was first saved, regardless of when it was submitted. • <i>Created By</i>: The person who created the application. • <i>Submission Date</i>: The date when the application was submitted.

Page Element	Description
	<ul style="list-style-type: none"> • <i>Submitted By</i>: The person who submitted the application. • <i>Description</i>: The description of the application. • <i>Applicant</i>: The applicant for whom the application was created. • <i>Total Fees</i>: The fees for the activity. • <i>Total Due</i>: The unpaid fees for the activity. • <i>Expiration Date</i>: The date that a pending application expires (not the expiration date for the actual license).
List View	View the transactions in list format.
Grid View	View the transactions in grid format. Unlike lists, grids include a header row with column labels.
Map View	<p>View the transactions on an interactive map.</p> <p>The left frame of the map view displays a list of transactions. The list includes only basic information about each item: the transaction ID, type, and status.</p> <p>The right frame of the map view displays a map with markers to show the locations of the items on the list. Click a list item to zoom to its marker on the map.</p> <p>See Viewing Map Markers.</p>

Reviewing Business License Transactions

Use the Transactions page to view summary information about business license activities such as consultations, license origination, amendments, and renewals.

To review business license transactions:

1. Select the **Business License Transactions** tile on the agency springboard.

This navigation option brings you directly to the **Business Licenses** tab on the Transactions page.


If you access the Transaction page using the **Permits** or **Planning Applications** tiles on the agency springboard, simply click the **Business Licenses** tab to switch lists.

2. Review transaction information.

The following table of page elements includes the column labels that appear in the grid view. The list view shows the same information, but without column labels.

Page Element	Description
License	<p>Displays summary information about the license:</p> <ul style="list-style-type: none"> ○ Consultations display a consultation ID. ○ License-related related transactions (origination, renewal, and amendment) display the license ID. This is assigned when an origination application If the license has been issued, the ID is a link to the license details.

Page Element	Description
	<ul style="list-style-type: none"> ○ All transaction rows display the application type. ○ Origination transactions display <i>Active</i> if the license was issued and has not expired. ○ License-related related transactions (origination, renewal, and amendment) display license expiration information. If the license is about to expire, the expiration information includes a warning icon as well as the expiration date and the number of days remaining until that date. <p>On the All tab, the column label for this information is Application.</p>
Business Information	<p>Displays the business name and address that are associated with the transaction location. This can be different from the name and address of the business itself.</p> <p>If the application indicates that the location is outside of the agency's jurisdiction, no address appears here.</p> <p>On the All tab, the column label for this information is Property.</p>
Description	<p>Displays the description of the application. Applicants optionally enter a description on the Application section of the application form. Agency staff can add or update descriptions on the overview or summary page of the transaction detail.</p>
Activity	<p>Displays the type of activity, such as <i>Consultation</i>, <i>Origination</i>, <i>Renewal</i>, or <i>Amendment</i>, along with the activity status.</p> <p>Pending transactions of all types also display expiration information. The transaction must be submitted by this date. When the pending transaction is about to expire, the messages include a warning icon and the number of days remaining.</p> <p>Note: On the All tab, the column label for transaction activity information is Additional Information.</p>
Assigned	<p>This column appears only in grid view. It displays the name of the business license specialist who is assigned to the activity.</p> <p>In list view, the assignment information appears with the activity information.</p> <p>This information does not appear on the All tab.</p>
Fees	<p>Displays the total fees for the activity, and the balance due if the total has not been paid.</p>

Page Element	Description
<p>Actions</p> 	<ul style="list-style-type: none"> ○ Select the Copy Application button to copy this application into a new application. See Copying an Application. ○ Select the Pay button in the Actions column to submit payment information on behalf of the applicant. <p>The Pay button takes agency staff to the Pay Fees page where you can initiate a full or partial payment for the application fees. The Pay button on the Applications page takes applicants 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. For more information about paying fees, see the Payment Flow Overview.</p>

3. To access the details for a transaction, click the row.

If the application hasn't been submitted (it is in *Pending* status), the application form appears. You can review and update the form and submit it on behalf of the applicant.

If the application has been submitted, the detail page for the business license transaction or consultation appears.

Navigating to Business License Activity Details

The business license activity detail pages contain the information you need to manage business license and consultation applications throughout their lifecycle, such as workflow, fees and payments, communications, and more.

You navigate to the activity details through a panel with tabs on the left side of the page. Only users with PSC_BL_ACCESS_CONFIDENTIAL_DATA permissions get full access to the license activity for a business license.

Access the activity details through the **Business License Transactions** tile on the agency springboard, then select the consultation or business license application from the list on the Transactions page. You'll find these tabs for viewing details about this application:

Page Name	Description
Activity Summary	<p>View a summary of activity for the business license or consultation with links to more detail.</p> <p>See Viewing a Summary of Business License Activity.</p>
Business Information	<p>View and update business information associated with a business license or consultation captured during the application process.</p> <ul style="list-style-type: none"> • Business Details • Owners

Page Name	Description
	<ul style="list-style-type: none"> • Location <p>See <i>Viewing Business Information</i>.</p> <p>You can find business information associated with an issued license on the license pages. See <i>Managing Business Information</i>.</p>
Workflow	<p>View the workflow status of each task as defined by the agency using Oracle Integration Cloud (OIC).</p> <p>See <i>Using Workflow</i> and <i>Managing Tasks</i>.</p>
Application Details	<p>Review information captured from the application intake form that is specific to the type of business license or consultation.</p> <p>See <i>Viewing Business Application Information</i>.</p>
Contacts	<p>Review and add contacts for the permit.</p> <p>See <i>Working with Application Contacts</i>.</p>
Attachments	<p>View a list of files and upload or download documents on this page.</p> <p><i>Working with Attachments</i>.</p>
Comments	<p>Review or add comments pertaining to this permit.</p> <p><i>Working with Comments</i>.</p>
Fees and Payments	<p>Manage fees and payments.</p> <p>See <i>Working with Fees and Payments</i>.</p>
Communications	<p>Send ad hoc email messages and notifications associated with this business license or consultation transaction.</p> <p>See <i>Working with Communications</i> and <i>Working with Ad Hoc Communications</i>.</p>
Status History	<p>View the history of application status changes.</p> <p>See <i>Viewing Application Status History</i>.</p>
Related Transactions	<p>Create and view links between transactions.</p> <p>See <i>Working with Related Transactions</i>.</p>

Viewing a Summary of Business License Activity

You view a summary of activity for a business license on the summary page. Here you get a snapshot of the business license application details, with links to more information about the workflow and fees and payments.

The summary is updated to show the latest transaction activity associated with the business license.

Header Information

The left side of the header displays the address of the business location, along with the Doing Business As detail.

- If the business is physically located within the agency’s jurisdiction, the address is displayed in the header of the summary page and in the Overview page of the business license.
- If the business location is outside the agency’s jurisdiction, which includes mobile businesses, then the header displays the address from the business details page.

The right side of the header displays:

- The license activity
- The business license number with a link to the access the business license page. This link is available only after the license is issued, and not available when the license activity is in the origination status.
- The type of the license application.
- The license status.

The header also shows the physical location on a map.

Tip: As agency staff, you can also assign a specialist on the summary page. Both agency staff and the applicant can add a description of the application.

Viewing Application Details

1. Select the **Business License Transactions** tile on the Agency Springboard.
2. On the Transactions page, click the row for the selected business license application to open the Activity Summary page.
3. Let’s take a look at some of the details you can review or actions you can take:

Page Element	Description
Status	Review the application status.
Submitted By	Review the name of the person who submitted the application and the date when it was submitted.

Page Element	Description
Received Date	<p>Review the date when the license 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 Activity Summary page.</p>
Specialist	<p>Review the name of the specialist assigned to the business license application.</p> <p>Only agency staff can assign or reassign a specialist to the application by clicking the Assign or Reassign link, respectively.</p> <p>Click the History icon next to the Specialist field to view a history of assignments.</p> <p>For more information about working with specialists, see <i>Working with Specialists</i>.</p>
Description	<p>Enter a description of the application by clicking the Add link, or update the description by clicking the Edit link in the Description field. The agency staff or applicant can add or edit a description.</p>
Effective Date	<p>Review the date the business license becomes effective.</p>
Expiration Date	<p>Review the expiration date of the application.</p> <p>If the Extend link is available next to the Expiration Date field, agency staff can enter a new expiration date that allows more time before the application expires.</p> <p>Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the business license type, you might see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see <i>Expiration Overview</i> and <i>Working with Application Expiration</i>.</p>

4. There are also sections with information about the selected application with links to navigate to more detail.

Page Element	Description
Applicant	<p>View the applicant's name and contact information.</p> <p>Click the View Details link to open the Contacts page. For more information about contacts, see <i>Working with Application Contacts</i>.</p>

Page Element	Description
Workflow	<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 View Details link to open the Workflow page. For more information about workflow, see <i>Using Workflow</i>.</p>
Fees and Payments	<p>View the total fees paid, amount due, and the date and amount of the last payment.</p> <p>Click the View Details link to open the Fees and Payments page. See <i>Working with Fees and Payments</i>.</p>

Working with Specialists

You assign and reassign specialists to a business consultation and license application. Access the specialist assignment history on the Activity Summary page of the business license or on the Overview page of the business consultation application.

The list of available specialists is limited to the agency staff that have the Specialist job function, which is defined on the Agency Staff page. The specialist must also be assigned to the specialist Job Function Attribute for *Business License Application Types* within the Specialist job function. For more information, see *Setting Up Agency Staff*.

Assigning a Specialist

1. Select **Business License Transactions** on the Agency Springboard.
2. Click the row for a business consultation or license application on the Transactions page.
3. On the Overview page of the consultation or the Activity Summary page of the license application, click the **Assign** link in the **Specialist** field.

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


4. Select the check box for the specialist to assign them to the consultation or license application.
5. Click **Save** to save your selection.

Viewing Specialist Assignment History

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

1. Select **Business License Transactions** on the Agency Springboard.
2. Click the row for a business consultation or license application on the Transactions page.

- There are two ways to view the specialist assignment history on the Overview page:

Page Element	Description
	Click the History icon next to the Specialist field to open the Specialist Assignment History page.
Reassign	Click the Reassign link next to the Specialist field to open the Assign Specialist page. Click the History tab.

- View a list that includes past specialist assignments, the dates they were assigned, and the specialist currently assigned to the consultation or license application, if any.

Viewing Business Information

Agency staff can view and update business information associated with a business license or consultation captured during the application process.

The business information available in the business license activity details provides you with the details of the business, its owners, and the locations of the business all arranged in separate tabs.

- Select the **Business License Transactions** tile on the Agency Springboard.
- Click the row for a consultation or business license application on the Transactions page.
- On the Activity Summary page, expand the **Business Information** navigation menu item in the left pane.
- Select a tab under **Business Information** in the left pane to view the page. Here are the pages with business information from the submitted application.

Page	Description
Business Details	View information such as the legal name of the business, the ownership type, address, federal tax ID, fiscal year end, and other business details. Agency staff with appropriate permissions can update the business information.
Owners or Corporate Officers	View the name and contact information of the business owner or corporate owners, as well as the ownership percentage. Agency staff with appropriate permissions can add or update the owner or corporate officer information.
Location	View information about the business location for the license. In addition to the application status, here's some of the license information included on the page: <ul style="list-style-type: none"> Doing Business As (DBA) name and website Physical address and parcel number.

Page	Description
	<ul style="list-style-type: none"> ○ Mailing and billing address ○ Phone numbers and emergency contacts at the location ○ Tax IDs and State Equalization Board number ○ Business category, subcategory, and the start date of the business operations. <p>Note: Agency staff with appropriate permissions can add or update the location information.</p>

Using Workflow

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

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

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

You don't use workflow functionality to perform the actual task. If workflow includes a task to review plans, you need to review the plans manually and record your plan review decision in the plan review pages and update the status of the workflow task to indicate the result, such as setting the status to *Complete*. As an inspector, when you approve the final inspection, the workflow engine automatically changes the inspection task in the workflow to complete.

Security Details for Using Workflow

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permit Workflow Administration	Administer permits workflows.	PSC System Administrator PSC Permits Supervisor PSC System Administrator
PSC Permits Workflow User	Participate in permit workflow, add, update comments and attachments on workflow	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer

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

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

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician

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

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 Permitting and Licensing*.

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. 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.

Managing Workflow Tasks in Code Enforcement

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.

When an incident or case is created, all related workflow tasks are assigned to a group or role by default. If required, the agency administrator must manually assign a staff member to each workflow task.

When an incident or case is reassigned to another staff member, then only those workflow tasks that were assigned to the previous assignee will be automatically assigned to the new assignee. The remaining task assignments won't change.

Workflow Task Assignment Changes with Reassignments

Consider an incident or case assigned to *Code Officer 1* and it has 3 workflow tasks, assigned to *Code Officer 1*, *Code Officer 2*, and *Code Officer 3* respectively.

When the incident or case is reassigned to *Code Officer New*, the workflow task that was assigned to *Code Officer 1* will be reassigned to *Code Officer New*, and the remaining tasks will remain assigned to *Code Officer 2* and *Code Officer 3* respectively.

Using the Two-Panel View in Workflow for an Application

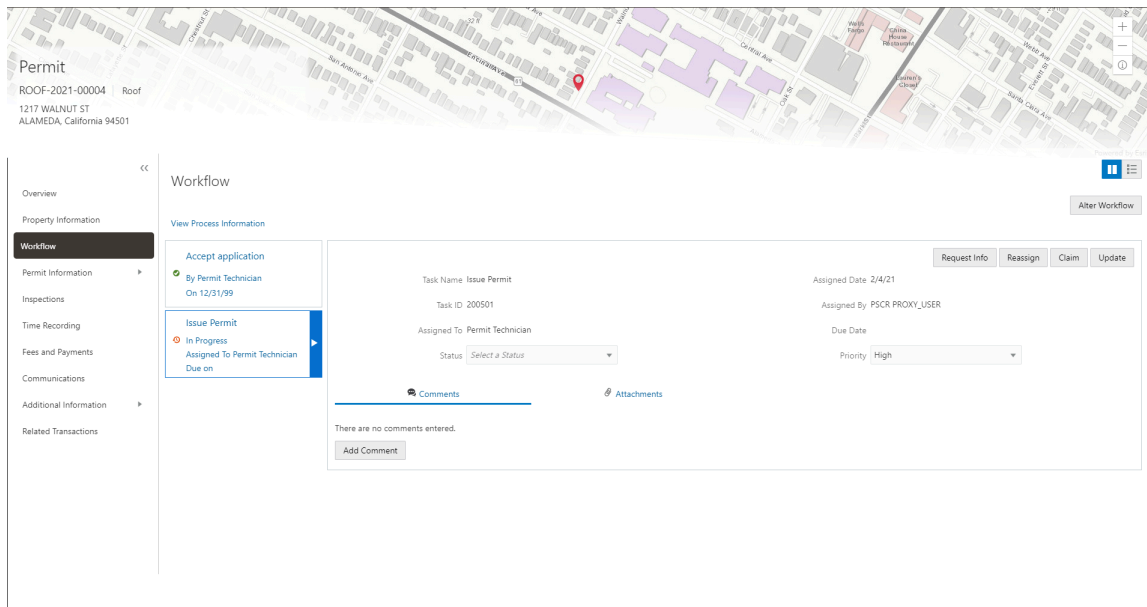
To manage workflow tasks in a two-panel view:

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"> ○ Task name ○ Task status <p>Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always <i>In Progress</i>. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks.</p> <ul style="list-style-type: none"> ○ Assignee

Panel	Description
	<p>Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task.</p> <ul style="list-style-type: none"> ○ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	<p>The right panel displays more details for the task that is selected in the left panel.</p> <p>If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments.</p> <p>Completed tasks are not updatable, but you can add comments to them.</p>

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

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

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

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

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

Page Element	Description
Reassign	<p>Click to choose an assignee for the task.</p> <p>As a code enforcement agency staff you can assign your own workflow tasks to other officers or technicians who have the appropriate area of responsibility. Administrators with appropriate permissions can reassign workflow tasks for their staff.</p> <p>This assignment has no effect on the incident or case assignments. However, if you reassign an incident or case to another staff, any active workflow tasks assigned to the previous staff member are automatically reassigned to the new assignee.</p> <p>For details related to code enforcement tasks, see Using the Code Officer Worklist and Using the Code Technician Worklist.</p> <p>For details related to permits, planning and zoning, and business license application tasks, see Managing Tasks.</p>
Claim	<p>Click to assign the task to yourself.</p> <p>This button is visible only for tasks that are assigned to a group rather than to an individual.</p>
Release	<p>Click to remove yourself as the task assignee. The task is reassigned to its default group so that group members can see and claim the task.</p> <p>This button is visible only for tasks that are assigned to you.</p>

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

Page Element	Description
Status	<p>Select a status that represents the final outcome of the task.</p> <p>The task statuses depend on the workflow setup. For example, the available statuses for a task that requires a simple approval might be <i>Approve</i> and <i>Reject</i>. The workflow status of each task is defined by the agency using OIC.</p> <p>Other tasks might require different statuses. The sample workflow that Oracle provides includes these statuses for the task where you review an application: <i>Accepted – Plan Review Not Required</i>, <i>Accepted – Plan Review Required</i>, <i>Planner Assigned</i>, <i>Specialist Assigned</i>, <i>More Info Needed</i>, and <i>Reject</i>.</p>

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

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

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

- 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 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.

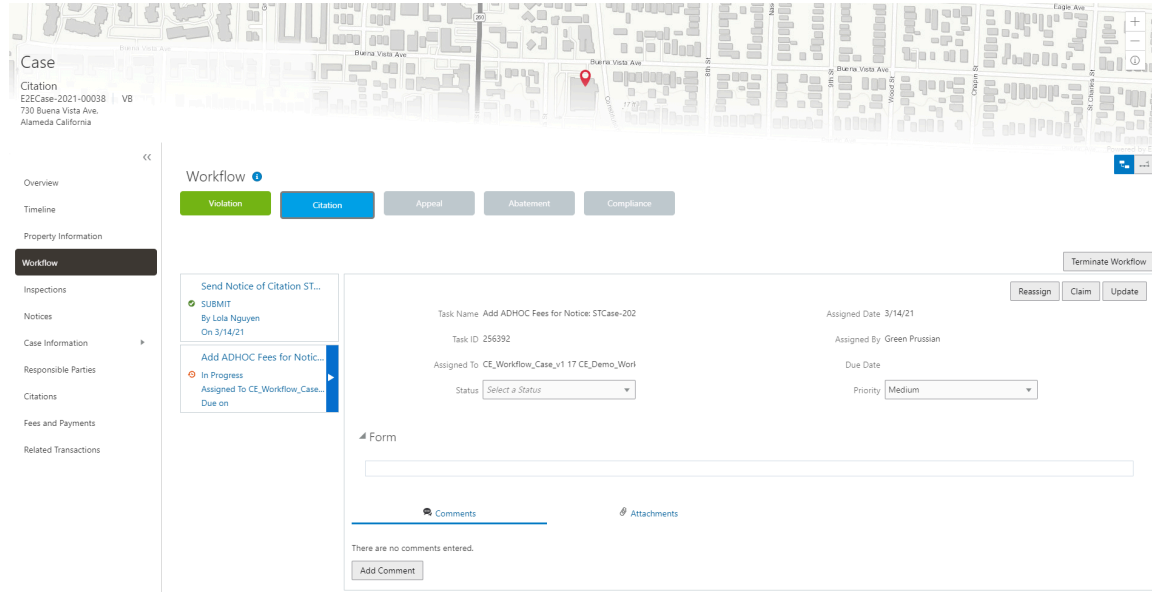
To access Incident or Case Workflow page in the two-panel, stage view:

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

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

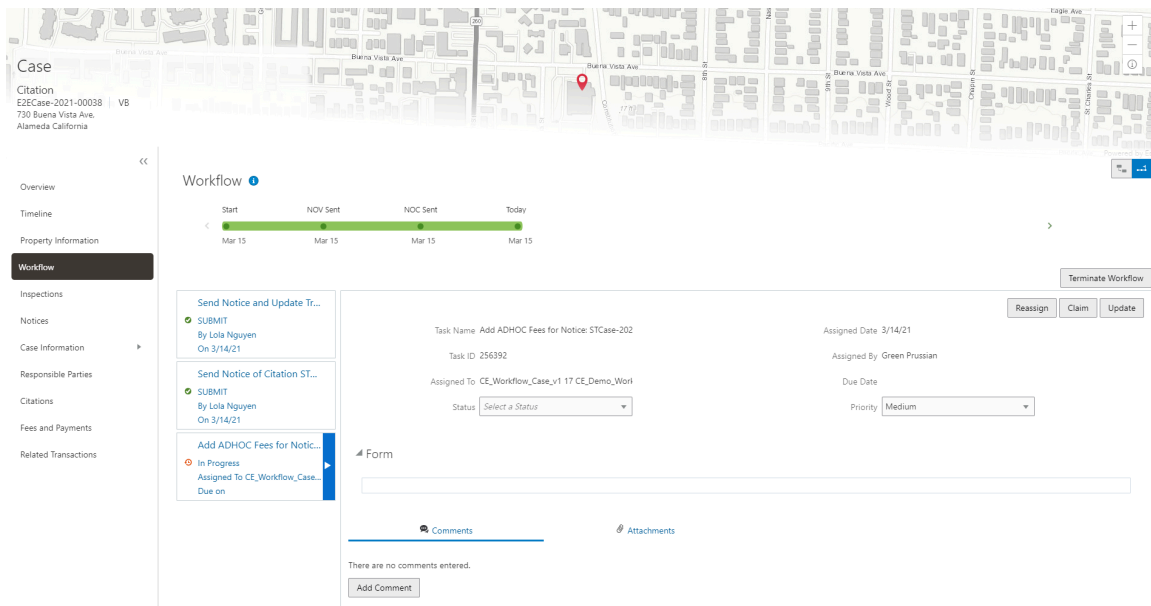
To access the Incident or Case Workflow page in the two-panel, milestone view:

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

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

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

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



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

Using 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 existing 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. Files 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.

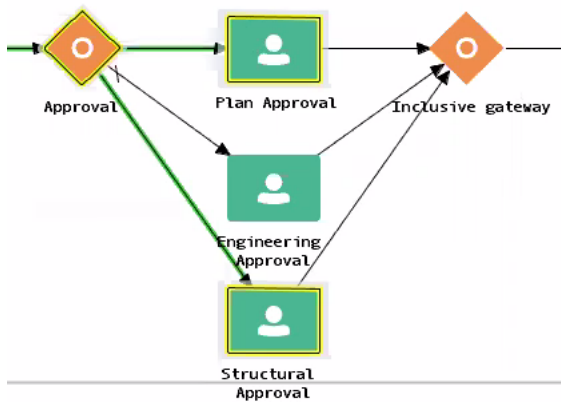
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

- 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.

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.

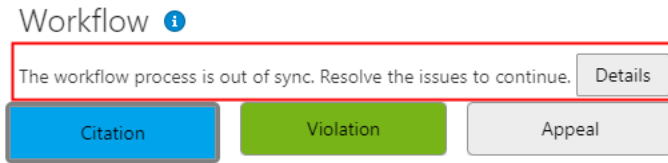
Note: Any applicable fees or conditions need to be applied manually to reopened transactions.

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

Working with Inconsistent Processes

Sometimes, though rare, the workflow process can get out of sync with either the Oracle Permitting and Licensing 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](#).

Working with Consultation Outcome

Agency specialists determine the applications that are required to be submitted by the applicants, based on the nature of the business license they discuss during the consultation meeting.

Applicants and agency staff review the summary information and comments entered by their assigned agency specialist on the Consultation Outcome page and proceed with creating and linking the required applications. This page is displayed for business consultation applications only.

Adding a Required Application

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

1. Select **Business License Transactions** on the Agency Springboard.
2. Select the consultation application record for which you want to add the required applications. The consultation details page opens.
3. Click **Consultation Outcome** in the left panel. The Consultation Outcome page lists all the required application types added for the submitted business license application.
4. Click the **Add** button to open the Required Application page and enter values for the following fields:

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

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

Adding a Comment


As an agency assigned specialist you add comments to the Consultation Outcome page, where the applicants can view the detailed information you have entered regarding the consultation meeting outcome.

1. Select **Business License Transactions** on the Agency Springboard.
2. Select the consultation application record for which you want to add your comment. The consultation details page opens.
3. Click **Consultation Outcome** in the left panel to access the Consultation Outcome page.
4. In the Additional 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.
5. Click **Save**.

Viewing the Consultation Outcome

To view the summary information:

1. Select **Business License Transactions** on the Agency Springboard.
2. Select the consultation application record for which you want to add your comment. The consultation details page opens.
3. Click **Consultation Outcome** in the left panel to open the Consultation Outcome page.
4. In the Required Application section, view a list of application types that are required for your submitted business license application. Find additional information:

Page Element	Description
Application Type	View the type of application required.
Application	Use the available options: <ul style="list-style-type: none"> ○ <i>Create</i>: Click to open the Create Application page. The system automatically populates the application form with values copied from the applicant's consultation application. You can make changes and save or submit the application. ○ <i>Link</i>: Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click Save. The Consultation Outcome page now lists the application you just selected. ○ <i><Application></i>: Click to open the Overview page of the linked business license application. ○ : Click to remove the link from the required application type.
Status	View the status of the application type. For example, Not Started and Inspection. The Not Started status Indicates that no application has been created or linked for the identified application type.
Comments	View the comments included by the specialist regarding the application type.
Action	Select an action you want to perform on the transaction: <ul style="list-style-type: none"> ○ <i>Edit Comments</i>: Click to open the Required Application page and update the comments.

Page Element	Description
	<ul style="list-style-type: none"> ○ <i>Delete</i>: Click to delete the required application type. you can't delete a required application type that is linked to an application. <p>Note: These actions are available only to specialists.</p>

5. In the Additional Comments section, view a list of comments entered by the assigned specialist of your consultation. Only specialists can create and edit the comments.

Viewing Business Application Information

You review information captured during the application intake that is specific to the business license 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 business license application, they use elements that capture the information necessary for evaluating adherence to business license requirements. For example, for a restaurant application, the application details might include data about fire safety, seating capacity, site use, and parking. The application details might also include requirements for application submittal.

Updating Application Details

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

1. Select **Business License Transactions** on the Agency Springboard.
2. Click the row for a consultation or business license application on the Transactions page.
3. On the Overview page, expand the **Consultation Information** or **License 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.

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 PSC Planning Assistant PSC Associate Planner 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 PSC Planning Assistant PSC Associate Planner 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 PSC Principal Planner PSC System Administrator
PSC Planning Application Management with Elevated Access	Manage pre-application outcome for all the applications.	PSC Zoning Administrator PSC Principal Planner PSC System Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles

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

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 Oracle Permitting and Licensing](#).

Scheduling a Meeting

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

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

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

To schedule a meeting:

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

Page Element	Description
Meeting Subject	Review the subject for the meeting. Note: Only specialists or planners can change the subject of the meeting.
Meeting Agenda	Review the agenda for the meeting. Note: Only specialists or planners can change the agenda of the meeting.
Scheduled Date	Select a date to schedule the meeting. The dates available for scheduling your meeting are based on the meeting template applied and the agency's holiday calendar.

Page Element	Description
	See <i>Setting Up Planning Application Types</i> for the pre-application meeting template and <i>Setting Up Business License Types</i> for the consultation meeting template. For more details about templates, see <i>Setting Up Meetings</i> .
Scheduled Time	Select the start time of the scheduled meeting. The time values available for scheduling your meeting are based on the template applied by the administrator.
Meeting Duration in Hours	View the duration of the meeting, which is set up by the administrator in the template applied.
Meeting Location	View the location of the meeting. Only specialists or planners can change the location of the meeting.
Invitees	View the list of additional invitees for the meeting. Agency staff can add or remove invitees.

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

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

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

For more about workflow, see *Using Workflow*.

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

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

Adding Comments to a Meeting

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

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

1. Access the meetings page.
2. Click the **Add Comment** icon.
3. On the Comments page, add a new comment by entering the text. You can use the Rich Text options for formatting.
4. To add a comment by selecting from a list of existing comments:

- a. Click **Select Comments** on the Add Comments page.
- b. On the Select Comments page, click Favorite, Standard, or Recent to see the corresponding list of comments. For more information about standard comments, see *Working with Comments*.

Modifying and Deleting Comments in a Meeting

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

Viewing Meetings

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

Viewing Meetings through Transactions Page

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

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

Page Element	Description



Viewing Meetings on the Calendar

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

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

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

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

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

Rescheduling a Meeting

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

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

1. Access the transactions page from the Agency Springboard.
2. Select the consultation application, planning application, or the pre-application for which you want to reschedule the meeting.
3. For consultation application click **Consultation Information** and for pre-application or planning application click **Planning Application** in the left panel.
4. Navigate to the **Meetings** link to view the meetings page for the application.
5. On the record of the meeting you want to reschedule, click the **Reschedule** button.
6. On the meeting request page you can select a new available date and time for the meeting.
Note: Only specialists or planners can edit the subject, agenda, and location of the meeting.
7. Click **Schedule**.
The meetings page now lists the newly scheduled meeting record and the previous meeting record shows with a status of Canceled.
An online notification and email are sent to the applicant and to the assigned agency staff, with the updated meeting schedule — depending on the setup in the Communication template. For more information on communication event templates, see *Setting Up Communication Templates*.

Canceling a Meeting

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

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

Working with Tax-Related Details

Agency staff and applicants can view tax-related details associated with a business license and business captured during the application process, such as actual and estimated gross receipts, number of employees, and so on.

The reported information appears in the application activity detail pages. It's used to calculate business taxes, which you can view on the Fees and Payments page. Agency staff with appropriate permissions can also update the entered values on this page if changes are needed and recalculate taxes due. An applicant can also request updates when the business applies for an amendment or renewal.

1. Select the **Business License Transactions** tile on the Agency Springboard.
2. Click the row for a business license application on the Transactions page.
3. Expand the **License Information** navigation menu item in the left pane.
4. Select the **Tax Related Details** tab under **License Information** in the left pane to view the page.
Here are the fields with business tax information from the submitted application.

Page	Description
Tax Attribute	View the information that describes the business that was required at the time of the business license application. You'll see one or more measurable attributes, like number of employees, estimated or actual gross receipts, square footage, number of rental units, and more.
Description	View a description of the tax attribute as configured by the agency in the tax class.
Value	View the quantity entered by the business. Click Edit on the page to make updates.

Working with Application Contacts

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.

Note: Contacts don't have application access in the business license system. Also, you can have contractor contacts in permits and planning applications only.

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.

Permits

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 PSC Plan Reviewer PSC Planning Coordinator 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 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

Planning and Zoning

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
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 PSC Associate Planner 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 PSC Associate Planner 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 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 Oracle Permitting and Licensing, see *Creating Custom Roles for Oracle Permitting and Licensing*.


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 Oracle Permitting and Licensing*.


Managing Application Contacts

You manage application contacts on the Contacts page in the application details:

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 application row.
3. In the left navigation panel, expand the application information section: **Permit Information, Planning Application, or License Information.**
4. Select **Contacts** in the expanded section.

The applicant and any additional contacts are listed in the Contacts grid.

Page Element	Description
	The applicant icon indicates that the contact is the applicant.
Name	The name of the contact.
Phone	The phone number of the contact.
Type	The contact type, which is the role or position of the contact person relative to the current application. For example, a contact might be the applicant, a property owner, a business owner, or a contractor.
Business	The business name of the contact.
Contractor License and License Type	The contractor license number and the license type associated with the license. This information doesn't apply to business license contacts.
Permit Access or Planning Access	Indicates whether the contact has write access to the application. You can't set up contacts for business license applications with application access based on contact type.

Page Element	Description
Primary	<p>Indicates whether this is the primary contact. There must be one and only one primary contact for an application. The applicant is the primary contact by default in the application but can be changed in the application intake form or in the application details after submission.</p> <p>Note: The primary contact has the same application access as the applicant regardless of the access defined for their contact type.</p>
Active	Indicates whether this is an active contact.
	<p>Click the Actions button for a contact to select from available actions.</p> <p>Select <i>Make Primary Contact</i> to select this contact as the primary contact. This action automatically removes the primary contact designation from the previous primary contact, because you can only have one primary contact.</p>

Adding Application Contacts

You can add contacts saved in the applicant's user profile or manually add new contacts just to this application.

Here's how to add saved contacts:

1. Click the **Add** button on the Contacts page.
2. Click a contact row in the grid of saved contacts on the details page.
3. On the **Select Contact Type** modal page, look up the contact type in the **Type** field. You can see which contact types have application access on the search page. Business license contacts can't have application access.
4. Turn on the switch if you want to make this person the primary contact for the application.
5. Click **OK**.

Here's how to manually add a new contact:

1. Click the **Add** button on the Contacts page.
2. Click the **Create** button below the grid of saved contacts on the details page.

- On the blank Contact Details entry page, enter the new contact’s information, including their name, address, phone, and email.

Note: The email that you enter here must match the email that the contact used when registering if you want this person to have application access based on the contact type. Business license contacts can't have application access.

Page Element	Description
Type	<p>Select the contact type, which is the role or position of the contact person relative to the current application. For example, a contact might be the applicant, a property owner, a business owner, or a contractor.</p> <p>The contact type determines whether the contact can access the permit or planning application. You can see the Permit Access or Planning Access 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>
Active	<p>Select the check box to indicate that the contact is active. Only active contacts with the appropriate contact type can have application access.</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>
Permit Access or Planning Access	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether the contact type applied to the contact has application access.</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. Contact type access to applications doesn't apply to business licenses.</p>
This person is the primary contact for this application.	<p>Turn on this switch to make the selected contact person the primary contact for this application. Applications must have one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.</p>
Business	<p>If the contact represents a business, enter the business name.</p>

- Select the **Add to Profile** check box to save this contact in the applicant's user profile as well as on the current application. Applicants can add a contact only to their own profile. System administrators can also add contacts to the applicant's profile.
- Click **Save**.

Updating Application Contacts

- On the Contacts page, click the contact row to update their contact information.

2. On the Contact Details page, update the contact type and detail information.
 - o If the contact is the applicant, you can't modify the name. This person will always be identified as the applicant and active on the application. You can, however, change the contact type.
 - o All fields are available for updates for contacts other than the applicant.
3. As a system administrator, you can select the **Update Profile** check box to update the contact in the applicant's user profile with the changes you've made here.

When the contact is the applicant, they can use the **Update Account** check box to update their account with the changes they made.
4. Click **Save**.

Removing Application Contacts

Contacts who are profile contacts aren't deleted from the system; they are only removed from the current application. Contacts that exist only in the current application are deleted entirely.

Note: Only system administrators and supervisors have permissions to delete contacts. The contact who is the applicant can't be deleted.

1. Click the row for the contact on the Contacts page.
2. On the Contact Details page, click **Delete**.

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 Permitting and Licensing. 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 the Oracle Inspector mobile app.
- 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](#) and [Working with Inspection Details](#).

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. 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. Update and delete attachments added by themselves.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Add Permit Attachments	Add permit attachments.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer

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

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

These security roles apply to planning application attachments:

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments to submitted planning applications until they are closed. View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Agency Planning and Zoning Inquiry	View planning and zoning attachments.	PSC Agency Staff – All agency users
PSC Add Planning and Zoning Attachments	Add planning and zoning attachments.	PSC Planning Application Management with Elevated Access PSC Planning Attachments User Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator

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

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

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

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

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 Permitting and Licensing*.

Overview of the Attachments Page

You can use the Attachments page in the transaction details as the transaction or record's central repository for managing attachments. The page includes different tabs for viewing details and managing the files and a **Required Documents** section for permits and planning applications. The actions you can perform depend on your permissions.

The page tabs and elements may vary on the Attachments page depending on the type of transaction or record. Let's take a look at the different available tabs:

- The **Permits** tab displays attachments added through the Attachments page and required documents, if set up by your agency.
- The **Inspection** tab displays attachments that building inspectors uploaded in the Oracle Inspector mobile app related to the inspection checklists, inspection checklist items, or overall inspection.
- The **All** tab displays attachments added from all sources, including the Attachments page, the Workflow page, Oracle Inspector, plan reviews, and web form responses.

- The **Agency Uploads** tab displays all attachments added by the agency staff in Code Enforcement. The **Responsible Party Uploads** tab displays the attachments added by registered users while resolving code enforcement issues.

The Attachments page for a business license transaction doesn't have any tabs.

Working with Required Documents

The **Required Documents** section appears on the application intake form and here on the Attachments page in the application details if your agency adds a document group to the application type and the document group includes document categories that are configured to identify required documents. The list of required documents is informational only.

The documents are identified by their category or category and subcategory and the step in the application process when they're needed:

- **Submittal**
- **Issuance**
- **Acceptance**
- **Final inspection**
- **Complete**


If documents were provided on the application intake form, you can view them on the Permits tab on the Attachments page in the application details after submittal.



Click **Upload** to attach the specified document. The category and subcategory are automatically selected for the document during upload and the file appears in the attachments grid. Once a required document is uploaded, the **Attached** icon appears and a count keeps track of the required and provided documents. For information about setting up required documents, see the Implementing Your Agency guide.

Viewing Attachment Details

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 attachment grids on the different tabs. Here are the various elements:

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 Uploaded Documents icon, 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>

Page Element	Description
	<p>Displayed when an applicant, contact with application access, or agency staff uploads a protected PDF document to a permit or planning application. A protected PDF document has any setting that is controlled by a password or is otherwise secured.</p> <p>Plan coordinators can't add protected documents to a plan review cycle when electronic plan reviews are enabled in the agency options.</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>File Name</p>	<p>View the following information in the Filename field:</p> <ul style="list-style-type: none"> ○ Icon indicating the file type ○ Filename with file type extension ○ <i>File Size</i>
<p>Description</p>	<p>View the description of the attachment as entered by the person who added the attachment.</p>
<p>Source on the All tab for permits</p>	<p>View the source of the attached file. Valid values are:</p> <ul style="list-style-type: none"> ○ <i>Permits</i> ○ <i>Inspection</i> ○ <i>Workflow</i> ○ <i>Plan Reviews</i> <p>Attachments that are added to electronic plan reviews have their source changed from <i>Permits</i> to <i>Plan Reviews</i>.</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> <p>Note: This column appears only on the All tab for permits.</p>
<p>Uploaded By</p>	<p>View the name of the person who uploaded the file along with the date and time when the person uploaded the file. Registered public users see <i>Staff</i> instead of a name.</p>

Page Element	Description
<p>Source on the Inspection tab for permits</p>	<p>View the associated permit ID and whether the building inspector uploaded the file to an inspection checklist, inspection checklist item, or the overall inspection in the Oracle Inspector mobile app.</p> <p>Note: This column appears only on the Inspection tab for permits.</p>
<p>Reference</p>	<p>View attachment information:</p> <ul style="list-style-type: none"> ○ The checklist description for checklist attachments ○ The checklist item description for checklist item attachments <p>For inspection-level attachments, the field is blank.</p> <p>Note: This column appears only on the Inspection tab.</p>
<p>Category and Subcategory</p>	<p>View the document category for the attachment.</p> <p>The category and subcategory are available when a document group is specified during setup for the transaction type or in the contractor license options.</p> <p>Note: This field isn't available for case and business license attachments.</p>
<p>Final</p>	<p>Displays Yes when agency staff turn on the Final Document switch on the Attachment Details page for permit attachments.</p> <p>Note: This column appears only on the Permits tab.</p>
<p>Actions</p>	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> ○ <i>View Details</i> ○ <i>Download</i> ○ <i>Delete</i> <p>Note: For permits, the <i>Delete</i> action appears only on the Permits tab. Additionally, the security associated with your user ID may limit which actions are available to you.</p>

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

Adding Attachments

You upload files to the Attachments page using the Add Attachments page. For permits, you use the Permits tab of the Attachments page. The attachments on the Inspection tab are uploaded by building inspectors in the Oracle Inspector mobile app..

Note: The maximum file size is 150 MB depending on the page that you're uploading to in Oracle Permitting and Licensing. 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.

Updating Attachment Details

You can update 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.

Here's how to view and update document details on the Attachment 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 navigation 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 Attachment 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.

5. On the Attachment Details page, you can make these updates, depending on permissions:
 - o Public users can update the attachment description and, if available, the document category and subcategory of the files they uploaded.
 - o Agency staff can update any attachments on the Permits tab, including the description, document category and subcategory, and turning the **Final Document** indicator on or off.

Once a document is marked as final, agency staff must first remove the final flag before they can delete the document.

- o Only agency staff can update the description, document category and subcategory, and referenced person in the **Assigned To** field of attachments in the contractor license details.

You can also download attachments in the Oracle Inspector mobile app when you drill down to the Attachment Details page for the attachment.

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. Applicants, contacts with application access, and agency staff can view details and download files from the **Inspection** tab, but only administrators and the inspector who uploaded them can delete them.

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 PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Add Comments to Planning and Zoning	Add comments to planning applications that are not closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner

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

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

Note: Before application contacts can manage comments, your agency must add the PSC Contact User duty role (ORA_PSC_CONTACT_USER_DUTY) to the PSC Custom Registered Public User role (CUSTOM_PSC_REGISTERED_PUBLIC_USER) and enable application access for the contact type.

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

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 Permitting and Licensing*.

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:
 - o *Favorite*: Comments that you have marked as favorite.
 - o *Standard*: All the predefined comments available.
 - o *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
Fee Description	The description of the fee as defined when creating a fee item.
Amount	The amount due for each fee.
Currency	The currency in which the transaction is paid.
Status	<ul style="list-style-type: none"> ○ <i>Canceled</i>: Indicates the fee payment is no longer required. ○ <i>Pending</i>: Indicates the fee is pending the agency's finalization. The fee may or may not become due. ○ <i>Hold</i>: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved. ○ <i>Due</i>: Indicates the current fee request is due and needs to be paid. ○ <i>Refund Pending</i>: Indicates that a refund was submitted for processing and approval. ○ <i>Refunded</i>: Indicates the fee was reversed and a refund was issued. ○ <i>Void</i>: Indicates the refund for the fee was voided. ○ <i>Waived</i>: Indicates the applicant no longer has to pay the fee because it's been waived. ○ <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.
Department	The department within the agency requiring the payment.
Assessed Date	The date the request for payment was issued.
Payment Date (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"> ○ <i>Cash</i>: The name provided by the customer to the cashier. ○ <i>Check</i>: The name recorded during payment processing, usually the name on the check. ○ <i>Credit or debit card</i>: The name returned by the payment processor. ○ <i>Offline</i>: The name recorded during payment processing. ○ <i>PayPal</i>: The name returned by the PayPal.

Page Element	Description
	<ul style="list-style-type: none"> ○ Trust account: No name is displayed.
Payment Reference	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
Invoice	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
Total Fees	The total amount of fees that may be applicable to the application.
Total Payable	<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>
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.
Pay	<p>Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment.</p> <p>If you want to make a partial payment, deselect the <i>Select All</i> check box to clear the check boxes for all the fee items and then select individual items. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p>Note: The Pay button takes applicants and contacts with application access directly to the Checkout page in payment services.</p>
View Deposit Accounts	Click to open the Deposit Accounts page and view a list of all deposit accounts associated with the project.

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, Oracle Permitting and Licensing 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 Oracle Permitting and Licensing, 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*.

Viewing Deposit Accounts

Agency staff and public users can view a list of all active deposit accounts that are associated with the current application. You select the deposit account to charge fees for a specific transaction that is associated with the application. Click the View Deposit Accounts link on the Fees and Payments page. The Deposit Accounts page lists the details of accounts:

- Account: Click the link ID to drill down to the details of the deposit account.
- Name: The name of the account
- Primary Owner
- Balance: The available balance amount in the account
- Minimum Balance: The minimum balance that must be maintained in the account
- Account Type

For information about deposit accounts, see *Depositing Funds*.

Working with Communications

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

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

Security Details for Working with Application Communications

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles

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

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




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 Permitting and Licensing](#).



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 or click Insert (+) and choose from the list for the following fields:

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are:

Page Elements	Definition
	<ul style="list-style-type: none"> ○ <i>Email</i>: Generates an email that is sent to users. ○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message. ○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. <p>Note: The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
Visibility	<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"> ○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction. ○ <i>Agency staff only</i>: Includes only agency staff. ○ <i>Applicant and Primary Contact</i>:: Includes agency staff and the primary contact on the transaction. <p>Note: This option is presently not applicable for Code Enforcement.</p>
Display Format	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Create Web Form	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
Priority	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
User Can Delete	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p>

Page Elements	Definition
	<p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p>Insert Web Form</p>	<p>Click the icon to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
<p>To</p> 	<p>Click the Insert button to view a drop-down menu from which you can search for and select recipients. The display shows the options and the count of values available, which are determined by the transaction you are working with and the channel type you selected in the Message Attributes section.</p> <p>For example, when you select a value here for the email channel type, the email ID is inserted into the field. You can delete the ID using the X icon, but you cannot edit it.</p> <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>Note: Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
<p>Cc and Bcc</p> 	<p>Enter or click + and select the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<p>Attachments</p>	<p>Click Add to add an attachment from your local device. After adding an attachment, you can click the Actions icon to view attachment details, download attachments, or delete attachments.</p>
<p>From</p> 	<p>Enter or click + and select 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>

Page Elements	Definition
	<p>Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
<p>Subject</p> 	<p>Enter a brief description of the purpose and content of the message or click + to select attributes to include.</p> <p>Note: This field doesn't appear for the <i>Text</i> channel type.</p>
<p>Message Body</p> 	<p>Enter or click + to select attributes for 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. 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 **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, attachments, 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.
 - If there are attachments, you can view detailed information about the attachment.

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"> ○ Individual Registered Users <p>Enter comma-separated user IDs for the registered users, for example, SYSTEM_ADMIN, BUSINESS_ANALYST.</p> <ul style="list-style-type: none"> ○ All Registered Users <p>Enter this attribute: #{User}. The application displays the alert when the registered user logs in.</p>

Page Element	Description
	<ul style="list-style-type: none"> ○ All Anonymous Users <p>Enter this attribute: <code>\${Anonymous}</code>.</p> <ul style="list-style-type: none"> ○ A Combination of Users <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>
Message Body	Enter the main body of the alert using plain, unformatted text.
Select and Insert	<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 Insert 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 Insert, the <code>\${Current Date}</code> variable appears in the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
Remarks	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

Modifying Ad Hoc Alerts

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

Deleting Ad Hoc Alerts

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

Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are:

Page Elements	Definition
	<ul style="list-style-type: none"> ○ <i>Email</i>: Generates an email that is sent to users. ○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message. ○ <i>Notification</i>: Generates a notification that appears when users click the Notifications button in the header at the top of the page in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service. <p>Note: The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
Visibility	<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"> ○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction. ○ <i>Agency staff only</i>: Includes only agency staff. ○ <i>Applicant</i>: Includes agency staff and the applicant on the transaction.
Display Format	<p>Select the display format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Priority	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
User Can Delete	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>

Page Elements	Definition
Select and Insert	<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 Insert 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 Insert, the <code>#{Current Date}</code> variable appears in the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
Reference	Enter a unique alphanumeric reference for the communication.
To	<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>
Cc and Bcc	<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>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
From	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p>Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
Subject	Enter a brief description of the purpose and content of the message.

Page Elements	Definition
	<p>Note: This field does not appear for the <i>Text</i> channel type.</p>
<p>Message Body</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
Status	Displays all of the transaction statuses that have been applied to the application. For a list of transaction statuses, see <i>Setting Up Transaction Statuses</i> .
Updated By	Displays the name of the person who performed the action that updated the status in the system.
Updated Date	Displays the date when the status changed for the application. The dates are displayed by the first to latest status.
Reason	Displays the justification for withdrawing an in-progress application or for canceling a pending application. A reason is required when the agency staff withdraws or cancels an application.

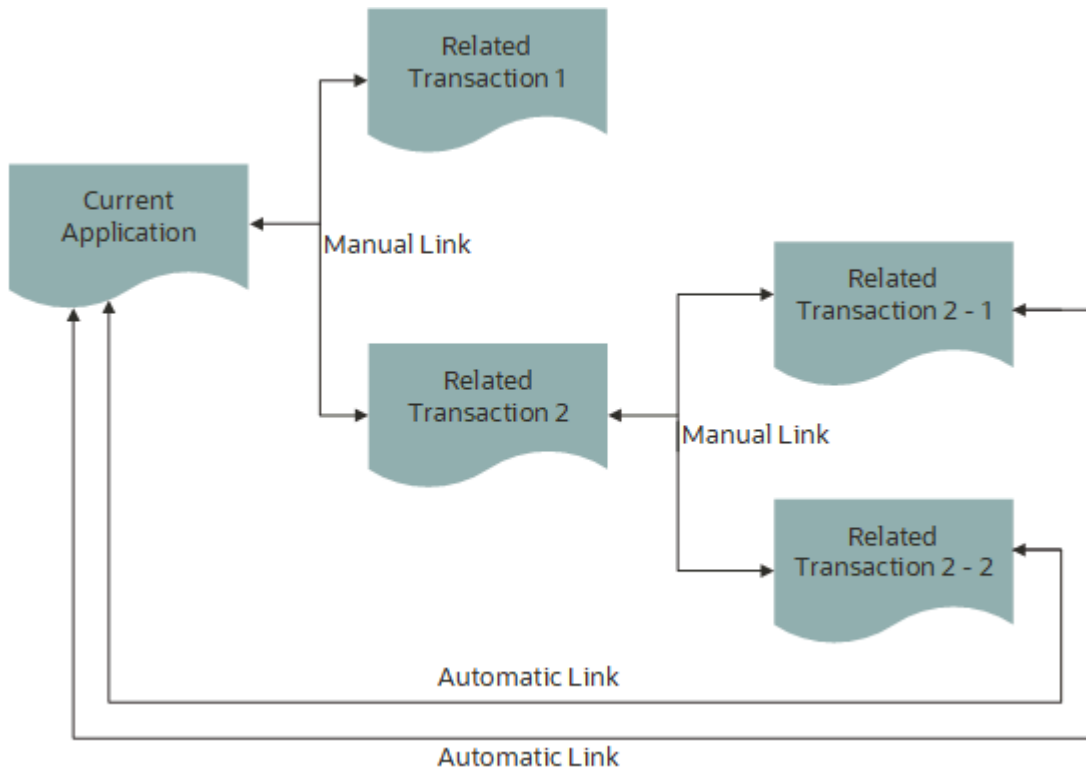
Working with Related Transactions

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.

Transaction Linking

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:



Security Details for Working with Related Transactions

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Related Transactions	Manage related transactions.	PSC Agency Staff - All agency users PSC System Administrator
PSC Registered Public users	Manage related transactions. Access is also dependent on the related transactions configuration in agency setup.	PSC Registered Public users

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

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 Permitting and Licensing](#).


Viewing Related Transactions


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

1. Access the Transactions page for your consultation, business license, permit, or planning application from the Agency Springboard. For Code Enforcement, access the Cases page.
2. Select the business license, permit, case, or planning application for which you want to link a transaction.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page and view related transactions added by applicants, contacts, and agency staff.

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

4. View the details of the linked transactions:

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

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.

6 Working with Business License Expiration

Expiration Overview

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

Expiration Rules

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

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

Business License Expiration Dates

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

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

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

Business License Consultation Expiration Dates

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

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

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

Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

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

- When the application expires.

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

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

- When the permit expires.

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

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

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

Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

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

- When the entitlement expires.

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

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

Pre-Application Expiration Dates

Expiration rules for pre-applications define the following:

- When an inactive pending pre-application expires.

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

- When the pre-application expires.

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

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

Processing Expiration Status

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

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

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

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

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

Viewing Business License Expiration

You can view expiration dates for different phases of the business license or business license application, which are calculated using the rules set up by your agency.

The expiration dates appear on the list of transactions that shows business license activity as well as on the license activity summary page. They also appear on the list of business licenses and the business license summary page.

In addition to expiration dates, you can see alerts. Here's an example of the alerts you would see on the Transactions list page: If the expiration rule is set up to show that an unsubmitted application in a pending status is about to expire in 5 days due to inactivity, the expiration date displays *Expires in 5 days on <date>*. When the application expires, you'll see *Expired on <date>*. You'll see similar alerts on the Business Licenses list page.

Viewing the Activity Expiration Dates

Here's how you can view expiration dates for the different business license transactions, such as applications and consultations:

1. Select the **Business License Transactions** tile on the Agency Springboard.
2. On the Transactions list page, you see the business license activity for the agency.

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

3. To view the expiration on the Activity Summary page of the business license, click the row for the business license on the Transactions list page. You'll see the date next to the **Expiration Date** field. When the expiration date is reached, the status changes to *Completed*.

Viewing the License Expiration Dates

To view the expiration dates for issued business licenses:

1. Select the **Business Licenses** tile on the Agency Springboard.
2. On the Business Licenses list page, you see the business licenses issued by the agency.

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

3. To view the expiration on the summary page of the business license, click the row for the business license on the Business License list page. You'll see the date next to the **Expiration Date** field and the status, such as *Active*, in the **Status** field. When the license expires, the status changes to *Expired*.

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	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> ○ <i>Once</i>: Select to run the process one time only. ○ <i>Hourly or minute</i>: Select to run the process at regular time intervals. ○ <i>Daily</i>: Select to run the process at regular intervals in days. <p>Note: <i>Daily</i> is the recommended option for running the expiration status update process.</p> <ul style="list-style-type: none"> ○ <i>Weekly</i>: Select to run the process at regular intervals in weeks. ○ <i>Monthly</i>: Select to run the process on specific days of the month. ○ <i>Yearly</i>: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and Minutes	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p>Note: These fields are available only if you select a process frequency of <i>Hours</i> or <i>Minutes</i>.</p>
Days	<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>Note: This field is available only if you select a process frequency of <i>Daily</i>.</p>
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.

Page Element	Description
	<p>Note: This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<p>Repeat – By day</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 Second and Wednesday 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>Note: 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>Repeat – By date</p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p>Note: 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>Month</p>	<p>Select the months in which you want your process to run.</p> <p>Note: 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.

7 Managing the Business License

Overview of Business Licenses

Business owners apply for licenses using the Oracle Permitting and Licensing Business Licenses system. Agency staff approve the license applications and issue licenses using workflow processes.

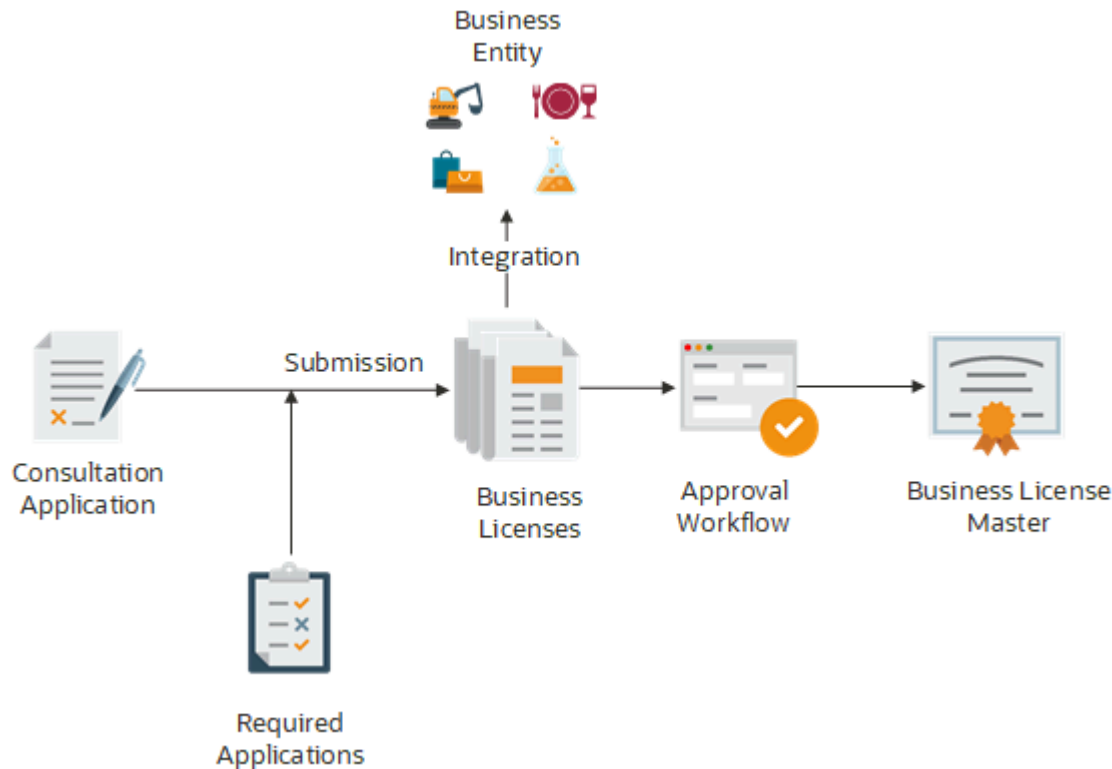
Business Licensing Flow

The business license process flow begins with an applicant applying for a business license. Once the application is received, the following sequence of events is processed:

Process	Object Used	Activity Type	Various Statuses
Agency staff such as the business specialist set up a consultation meeting with the applicants to determine the required applications that are to be submitted.	Business License Transactions Agency Springboard > Business License Transaction.	Consultation	Activity Status: Pending, Payment Pending, Pending Submit, Submitted, Accepted, In Process, and Completed.
Based on the meeting outcome, the required application types are linked or added to the license application submission.	Business License Transactions Agency Springboard > Business License Transaction.	Origination	Activity Status: Pending, Payment Pending, Pending Submit, Submitted, Accepted, In Process, and Completed. License Status: Pending, Payment Pending, Pending Submit, Submitted, Accepted, In Process, and Completed.
A business entity is created to maintain the details of the business — owners, locations, and license records.	Businesses Agency Springboard > Businesses.	Origination	Business Entity Status: Provisional. The status changes to Active once the license is approved.
Agency staff approve the license application using the Workflow process.	Business License Transactions Agency Springboard > Business License Transaction.	Origination	Activity Status: Completed. License Status: Active, Expired, and Void.
The newly approved license record is created and listed among active licenses.	Business Licenses Agency Springboard > Business Licenses.	Origination	Activity Status: Completed. License Status: Active, Expired, and Void.
The status of the business entity is updated with the license approval.	Businesses	Origination	Business Entity Status: Active.

Process	Object Used	Activity Type	Various Statuses
	Agency Springboard > Businesses.		

The following diagram provides a general outline of the business license process flow.



Managing Business Information

You find business detail pages in a collection that consolidates all aspects of a business, such as owners, locations, and licenses.

Business license applicants enter detailed business information during the application intake or consultation process. When the application is submitted as a new business, a new business record is created in the Community Development Business Licenses system as per the entries in the application. The new business record is in provisional status until the agency approves the application and issues a license. Once approved, the business information is updated and the business status changes to active.

For a license application submitted using the business information of an existing business in the system, the associated business record is updated based on the entries in the new application.

The integration between the business record and the license application enables you to view the latest information in the business detail pages. Here’s how you access the business detail pages:

1. Select the **Businesses** tile on the Agency Springboard.

Registered users access the **Businesses** tile on the landing page.

2. On the Businesses page, click the row for a business.
3. Navigate to business information using the links in the left panel.

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

Page Name	Description
Overview	<p>View the core information regarding the selected business with links to more detail.</p> <p>On the Overview page, review information, when available, about the selected business in sections, such as <i>Business Summary</i>, <i>Latest Activity</i>, and <i>Owners and Corporate Officers</i>. You can click the <i>View Details</i> links in these sections to navigate to more details.</p> <p>In the <i>Business Summary</i> section, click the legal name link to open the Business Details page.</p> <p>The <i>Owners or Corporate Officers</i> section displays the owner and up to three previous owners, at a time. If there are more owners, click the chevrons to go forwards and backwards in the list. Click the button on the owner box to open a modal window to view the details.</p>
Business Details	View information such as the legal name of the business, the ownership type, address, federal tax ID, fiscal year end, and other business details.
Owners	View a list of owners and corporate officers for the business. Click a person on the list to view detailed information about them.
Locations	View a list of the physical locations associated with the business. Click on a location to view detailed information about it.
Licenses	<p>View a list of licenses associated with the business. On this page you can:</p> <ul style="list-style-type: none"> • Click Apply to initiate another license application for the business. For more information on applying for a business license, see <i>Choosing an Application Type</i>. • Drill down on each license to view more information. • Amend or renew a business license by clicking the three-dot Action menu and selecting the appropriate action. <p>For more information on the Amend and Renew actions, see <i>Managing Business Licenses</i>.</p>

Note: When amendment and renewal transactions include changes to business information, those changes don’t appear on these pages until the transactions are approved.

Managing Business Licenses

When a business license application is approved, a business license record is created. The business license is distinct from the origination activity and from the business entity that holds the license.

Use the Business Licenses page to view summary information about business licenses and to access the details pages for individual licenses.

Registered User View of Business Licenses

Registered public users can access a list of their own active business licenses. The list includes the same information as the agency-facing list of business licenses.

To access the list, a registered user clicks the **Business Licenses** tile on the registered user landing page.

Managing Business Licenses

To manage business licenses:

1. Select the **Business Licenses** tile on the agency springboard.
2. Review the following business license information:

Page Element	Description
License	Displays the license ID, application type, <i>Active</i> if the license is active, and information about the expiration date. If the license is about to expire, the expiration information additionally includes a warning icon and the number of days remaining until the expiration date.
License Period	Displays the period for which the business license was issued and the expiration date for the license. These dates are updated for renewals.
Business Information	Displays the business name (the DBA) and the address for the licensed location. This can be different from the name and address of the business itself. If the application indicates that the location is outside of the agency's jurisdiction, no address appears here.
Description	Displays the description from the origination application, or from the renewal if the license is renewed. Applicants optionally enter a description during the application process. Agency staff can add or update descriptions on the Activity Summary page of the origination, renewal, or amendment transaction.

Page Element	Description
Fees	Displays the total fees and remaining balance for the business license, including the license origination, renewal, and amendment transactions. When all fees are paid, you'll see <i>Fees Paid</i> next to the amount.

- To amend or renew a business license, click the three-dot **Action** menu and select the appropriate action. If no actions are available, clicking the menu displays an explanatory message.

Action	Description
Amend	Select this action to start the process for amending a business license. This action is not available if the license already has a renewal or amendment in progress or if the business license type is not configured to allow amendments.
Renew	Select this action to start the process for renewing a business license. This action is available for licenses that are about to expire (as defined in the expiration rules) unless the license already has a renewal or an amendment in progress.

- To access the details for a business license, click the row.

Viewing the Business License

You view a business license summary on the Overview page, where you get a snapshot of information regarding an approved active license with links to latest activity detail. You can also view the business license certificate.

When you access the details for a business license, you see a summary of the business information. This information is updated to show the latest from the intake form submitted by the applicant.

Using the Overview Page

- Select the **Business Licenses** tile on the Agency Springboard.
- On the Business Licenses page, click the row for the selected application.
- On the Overview page, review details in the various sections.

Page Element	Description
Actions	Click and select the View Certificate option to open the business license certificate in a new window.
Category	View the category of the business.

Page Element	Description
Subcategory	View the subcategory of the business.
NAICS Code	View the NAICS code for the business.
Description	View the description about the business.
Issue Date	View the date on which the business license was issued.
Effective Date	View the effective date of the business license.
Expiration Date	View the date on which the license expires.

4. On the Overview page, review details in the Business Summary section.

Page Element	Description
Legal Name	View the legal name of the business.
Ownership Type	View the type of business ownership.
Tax Exempt	Indicates if the business is exempt from paying taxes. The value <i>No</i> indicates that taxes are applicable. In such a case, a field Exempt Type is displayed to indicate the type of exemption used.
Is this a mobile business?	Indicates if the business is of mobile type.
Physical Address	View the address of the business establishment.
Mailing Address	View the address of the business establishment for mailing purposes.

5. The Latest Activity section displays the most recent activities related to the business license. Each tile shows the following information:
 - o Type of license, such as Origination.
 - o The year the license is active.
 - o Activity status, such as Completed.
 - o Payment status, such as Paid.

Click the tile to open the detail view of the business license transaction.

Viewing and Printing the Business License Certificate

The business license certificate issued by the agency records the details of the business such as the name, license type, number, effective and expiration dates, and the issuing authority.

Depending on agency setup, you can view, save, and print the business license certificate like this:

1. Select the **Business Licenses** tile on the Agency Springboard.
2. On the Business Licenses page, click the row for the selected application to open the Overview page.
3. Click **Actions** and select the **View Certificate** option.

The business license certificate opens in a new window. If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Permitting and Licensing.

4. You can print or save the report from the browser window.

Your agency must define the Report ID BusinessLicenseCertificate in the business license type to generate the business license certificate. Your agency can also allow public users to view the issued certificate by enabling the **Allow Public User to View** option on the Business License Type page. See *Setting Up Business License Types*.

For you to print business license certificates, the agency must configure these parameters for Report ID BusinessLicenseCertificate:

Page Element	Value
Parameter ID	1
Parameter Name	P_LNP_RECORD_KEY
Parameter Data Type	String

Viewing the Business Information

The business information provides you with the details of the business, its owners, and the locations of the business all arranged in separate tabs. The following table provides you the navigation to this business information through various business objects:

Business Object	Navigation
Business License Transactions	Agency Springboard > Business License Transactions. Select the business license application record you want to access. On the Business License page select the Business Information tab in the left panel.
Business Licenses	Agency Springboard > Business Licenses. Select the active business license record you want to access. On the Business License page select the Business Information tab in the left panel.
Business	Agency Springboard > Businesses . Select the business record you want to access. On the Business page the left panel lists the tabs — Business Details, Owners, and Locations.

See also [Viewing Business Information](#).

Viewing the License Details

The Application Details page shows the information captured during the application intake that is specific to the business license application type. To access the page:

1. Select the **Business Licenses** tile on the Agency Springboard.
2. On the Business Licenses page, click the license record you want to review. The Overview page opens.
3. In the left panel, click **License Details** to view the details of the selected license.

For details of the page, see [Viewing Business Application Information](#).

Viewing the License Activity

A new business license record is created for each license period. The License Activity page lists all the license records related to the business licenses that exist on the basis of its validity period.

1. Select the **Business Licenses** tile on the Agency Springboard.
2. On the Business Licenses page, click the license record you want to review. The Overview page opens.
3. In the left panel, click **License Activity** to view the list of license records.
4. Click the row for a record to open the Activity Summary page of the business license transaction in a new window..

Note: You can access the activity details of the licence directly from the Business License page. Select **Business License Transactions** on the Agency Springboard and select the specific license record to open the Activity Summary page.

For details of the page, see [Viewing a Summary of Business License Activity](#).

Applying for a Business License Renewal

Business owners can submit an online renewal application to stay in compliance with licence ordinances.

Agency staff and businesses can renew business licenses for the types of licenses that are configured for renewals by the agency. When the license is about to expire, you can begin the renewal application process. You can also renew the

license when the license expires and after the license has expired, based on your agency's license expiration setup. A renewal application must be fully processed before you can start another renewal or an amendment.

Here's the flow for renewing a business license:

1. Click **Renew**.

When the license can be renewed, the **Renew** link appears next to the expiration date on the business license Overview page. You can also renew by selecting the **Renew** action for a license in the list of business licenses or on the Business License page of the business. If the license already has a renewal or an amendment in progress, the option to renew isn't available.

2. The renew action takes the applicant to the renewal intake form for the business license type. Fill out and submit the renewal application form.

In the renewal application form, you'll see the information copied from the most recent license transaction. This can be the license origination, an approved amendment, or a previous renewal. However, tax-related details aren't copied over and you must always report them. You'll be able to update the fields that were designated for renewals in the intake form to reflect any changes. If desired, you can click **Show All** to review information that is part of the license but can't be updated.

3. Pay any required renewal fees.

4. Agency staff accepts, reviews, and approves the renewal application.

The business license shows the renewal activity and status, such as submitted, pending, or completed, in the **License Activity** section of the Overview page. After fees have been paid and the application is approved, the renewed license status is *Completed*. Any adjusted information for your business appears on the license and business pages after application processing is complete.

Applying for a Business License Amendment

Businesses can request changes to the recorded information on their business license and for their business by filing an amendment online. Agency staff and businesses can amend active business licenses for the types of licenses that are configured for amendments by the agency.

Amendments are only valid for the current license period and an amendment application must be fully processed before starting another one. You can also amend license information when you renew an existing license. The process for submitting a renewal application is similar to the process for amending a license. For more information, see [Applying for a Business License Renewal](#).

Here's the flow for amending a business license:

1. Click the **Action** menu and select **Amend**.

If the business license type is configured to allow amendments, this action is available unless the license already has a renewal or amendment in progress. You can start an application for an amendment by selecting the **Amend** action for a license in the business license list, on the Overview page of the license, or on the Business License page of the business.

2. The amend action takes the applicant to the amendment application form for the business license type. Fill out and submit the form.

The information from the current license application, which can be the license origination or a renewal, appears in the amendment application form. The tax attributes are also inherited from the license transaction being amended. You'll be able to update the fields that were designated for amendments in the intake form design. Select **Show All** to view the full application, including read-only fields that can't be updated.

3. Pay any required amendment fees.
4. Agency staff accepts, reviews, and approves the amendment application.

The business license shows the amendment activity and status, such as submitted, pending, or completed, in the **License Activity** section of the Overview page and in the business license transaction list. After fees have been paid and the application is approved, the amended license is active. Any adjusted information for your business appears on the license and business pages after application processing is complete and the amendment is approved.

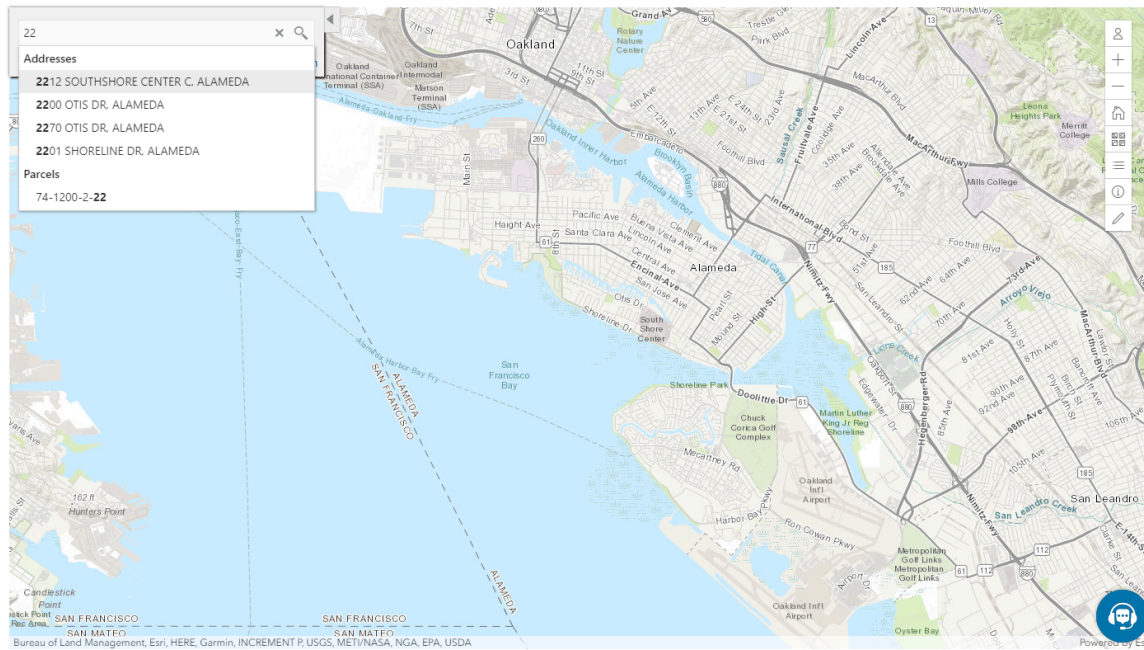
8 Working with Maps

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, cases, and business license activity.

Note: Map functionality relies on integration with a third-party map service such as Esri Geographic Information Systems (GIS) and configuration in Oracle Permitting and Licensing. 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 Permitting and Licensing system.

Main Maps

This table lists the main maps that display the agency’s business licenses, permits, planning applications, and projects. There are separate maps for different users. For more information, see *Using the Main Map and Explore Your City Map*.

Map Name	Users	Navigation	Usage
Agency main map	Agency staff	Click the Map icon in the page header, then click Main Map in the drop-down menu that appears.	<ul style="list-style-type: none"> View existing applications and projects. Search and select properties.

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

Additional Maps for Applications

This table lists additional maps that support applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the Property section of a new or submitted application, then click the Map View icon.	<p>Choose properties and other GIS objects to associate with the application.</p> <p>See <i>Working with Property Information</i>.</p>
Mobile inspection	Agency staff	Use the Oracle Inspector mobile application.	View permits and planning applications on a map.

Map Name	Users	Navigation	Usage
			See <i>Overview of Mobile Oracle Inspector for Permits</i> .
Permit list	Agency staff Registered public users	For agency staff: access the application lists on the Transactions page. For registered public users: access the application lists on the Applications page. On any of these pages, click the Map View icon.	View the locations of the transactions on the list. See <i>Managing Transactions</i> .
Public notification	Agency staff	<ul style="list-style-type: none"> Click the Map icon in the page header, then click Public Notification in the drop-down menu that appears. From the Planning Application detail page, select a hearing where the schedule is final, then select the Actions button and choose Generate Notifications from the menu that appears. 	Create a notification zone by specifying a distance from selected parcels. After creating a notification zone, download.csv files with parcel, address, and owner information for all parcels that are at least partially within the zone. See <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 Map View icon.	View the locations of incidents that appear on the selected worklist tab. See <i>Using the Code Technician Worklist</i> .
Code enforcement issue intake	Registered and anonymous public users	Follow the guided process for reporting an issue until you reach the page where you enter the issue location.	Identify the location of an issue that is being reported. See <i>Reporting Issues</i> .
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the Location of the incident option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application. See <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 View Recent Issues tile.	View recent code enforcement issues. See <i>Viewing Recent Issues</i> .

Maps in Transaction Headers

This table describes the map that appears in transaction headers:

Map Name	Users	Navigation	Description
Transaction header	Agency staff Registered public users	Access the detail page for the transaction.	The map that appears at the top of various detail pages. For example, this map appears in the detail pages for business license transactions, permits, planning applications, projects, incidents, cases, parcels, addresses, and owners. If the transaction is not associated with a location, the map displays the initial extent that is defined on the map profile.

You can set up one transaction header map for everyone or separate transaction header maps for public users and agency users. For more information, see *Implementing Delivered Maps*.

Using the Map Toolbar

The general toolbar for maps has tools that relate to the map itself, without regard to specific transactions. The map toolbar may also include widgets to add sketches and print map displays, depending on the agency's configuration.

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 tools appear on the main toolbar:


Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options. When you click this icon, a list of map profiles appears. The list

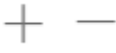








Image	Name	Configuration	Description
			displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the Enable Zoom switch on the map profile.	Use these tools to zoom in or out. You can also double-click a map location to zoom in.
	Show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

Image	Name	Configuration	Description
	Show Sketch Tools or Hide Sketch Tools	Use the Show Sketch switch on the map profile to enable the sketch widget.	Click to show or hide a toolbar with sketch tools. Use the sketch tools to draw a point, polyline, polygon, rectangle, or circle. See "Drawing on Maps" in this topic.
	Export Map to File	Enter a print service URL on the GIS Attribute Mapping page or on the map profile. Use the Show Print switch on the map profile to enable the print widget.	Click to open the Export dialog box to print the displayed map to a file. See "Printing Maps" in this topic.

Drawing on Maps

Agency staff and registered public users can draw on maps using the sketch widget. You can save the sketch on permit and planning application property maps associated with a transaction, including the application intake map, and update the description after the system saves the sketch. Although you can draw on other map pages, you can't save them.

To configure the sketch widget, the agency turns on the **Show Sketch** switch on the map profile. On a map, click the **Show Sketch Tools** icon, then select a sketch tool in the toolbar to draw a point, polyline, polygon, rectangle, or circle. When you finish your drawing, the system automatically saves the sketch and lists it under the property information below the map. You can update the description after the sketch is saved. The sketch toolbar includes tools to select and delete sketches.

Printing Maps

Oracle Permitting and Licensing provides an integration to print maps using Esri's print widget. Agency staff and registered public users can print the content displayed on different maps, including the permit and planning application property map and maps not associated with a submitted transaction, such as the application intake map or Explore Your City map. You have the option to save the generated file for submitted transactions as an attachment in the application details, but the file output for other maps isn't saved in the system.

To configure the print widget, the agency enters a print service URL on the GIS Attribute Mapping page or on the map profile and turns on the **Show Print** switch on the map profile.

Here's how to print a map:

1. Open a map and select the **Export Map to File** icon from the map tools toolbar.
2. On the Export dialog box, select the print output file format from the options provided by the print service and enter a file name.
3. Click **Export**.
4. If you're printing a transaction's property map, you can click **Yes** when prompted to save the file as an attachment in the application details.

Selecting Parcels and Assets

You can select a parcel during application intake by using the type-ahead search box on the Property map in the intake form or using the selection tools. You can select enabled GIS assets using the selection tool widget.

By default, parcel properties are always selected when using the selection tools. But your agency can also configure the selection tools on the application intake map to select only GIS assets that overlap parcels or both reference parcel data and GIS assets. This configuration applies to the application intake map only.

If your agency has enabled GIS asset and parcel layers to be selectable, you can turn off the different layers like this:

1. In the main toolbar, click the **Show Selection Tools** icon:  .

This opens the toolbar with the drawing tools.

2. Click the **Select Layers** icon:  .

This opens the map layers dialog box.

The map layers dialog box displays two columns: **Map layer** and **Selectable**. The eye icons for each layer indicate whether a layer is enabled or disabled.

3. Click the **Selectable** checkbox to make the map layer selectable using the selection tools.

When you select a GIS asset and the **Parcel** layer checkbox is marked, parcels that overlap the GIS asset are also selected on the map. Unmark the Parcel layer checkbox to turn off the parcel selection. Your agency must set up the Parcel layer to be selectable so that you can select parcels and GIS assets independently of each other.

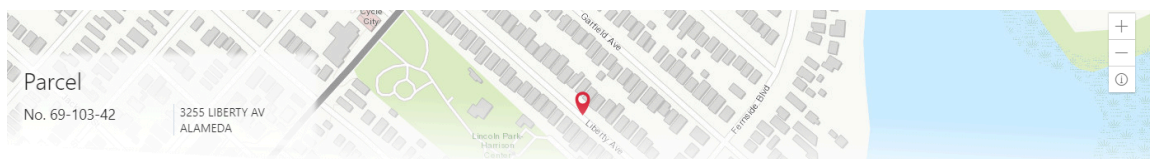
Viewing Map Markers

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.

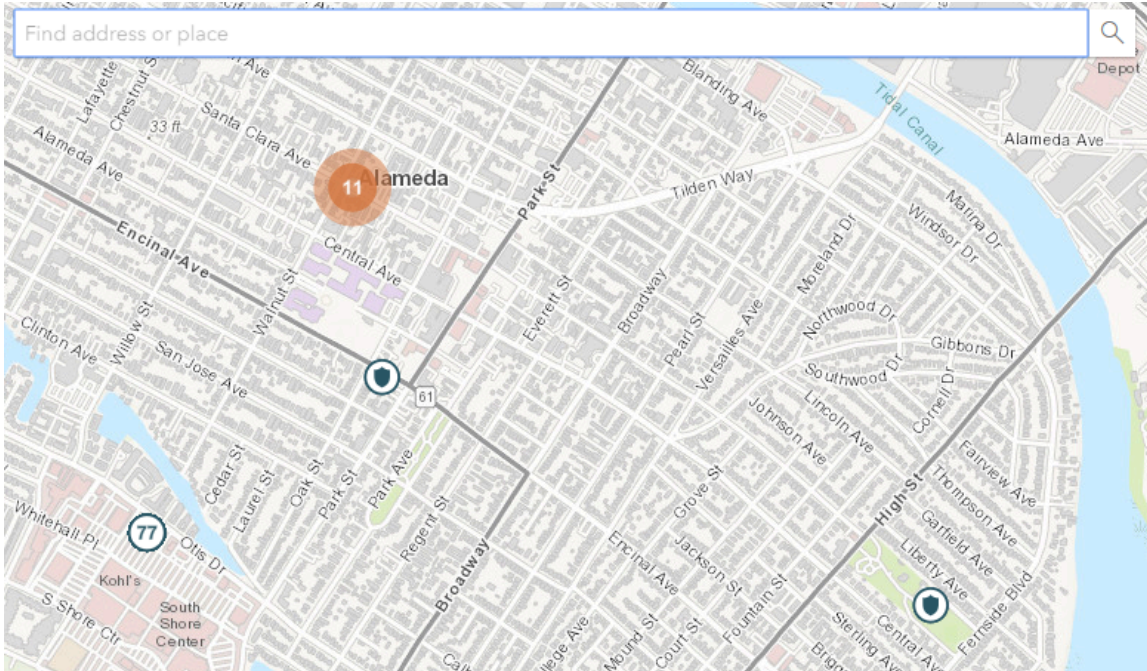


Other Map Markers







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:

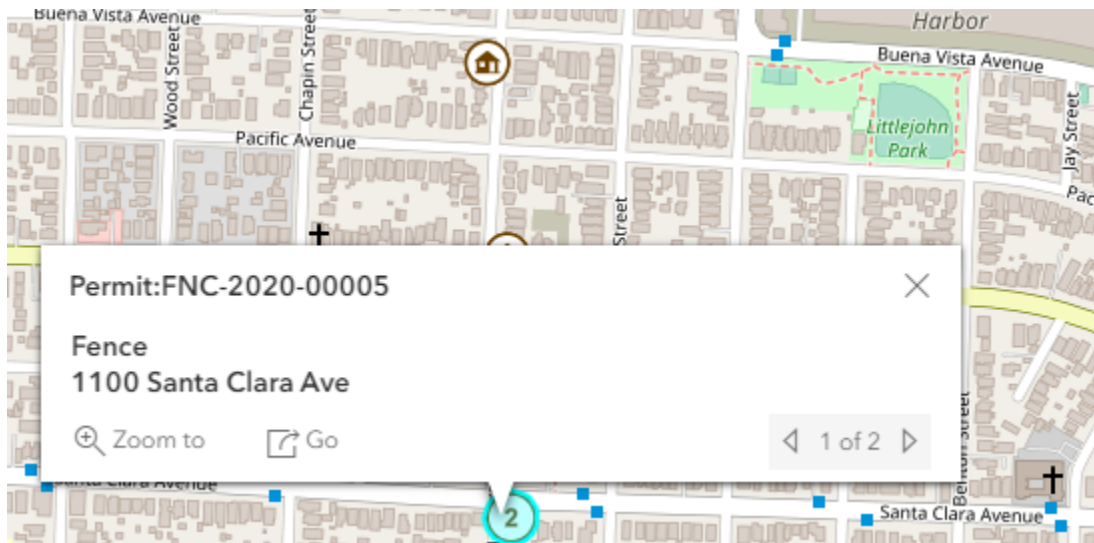
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions. The marker is the same color as it would be for a single transaction. For example, the marker is brown for multiple business licenses.

Viewing Details for a Marker

Clicking a marker displays a pop-up window with additional details.

Note: If the selection toolbar is visible and a selection tool is active, clicking a marker selects the location rather than opening the details pop-up.

This example illustrates the detailed information for a map marker. The location of the pop-up window depends on the docking settings in the map profile.



The detail window includes different information for different objects. Here is some of the information that can appear:

- The object ID
On maps that show multiple types of objects, the object type (such as “Permit”) appears along with the object ID.
- The object status.
Status information appears for incidents and cases, but not for other objects.
- Any applicable categorization, such as a permit type or an issue type and subtype.
- The address for the location.
- Controls for paging through multiple objects, if applicable.
When there are multiple objects, the paging controls appear around the text *<sequence number> of <total number of objects>*.
- A **Zoom To** icon for zooming in on the map location.
- A **Go** icon for opening the corresponding detail page in a new window.

Using the Main Map and Explore Your City Map

The agency-facing Main Map and the public-facing Explore Your City map provide options for viewing existing applications and projects on the map and for selecting properties so that you can start new applications.

With these maps, users can do the following:

- Select a property and view existing transactions for that property.
- Start an application for a selected property (public users and agency staff only).

Users who aren't sure what type of application is needed can launch the guide that provides recommendations based on questionnaire answers.

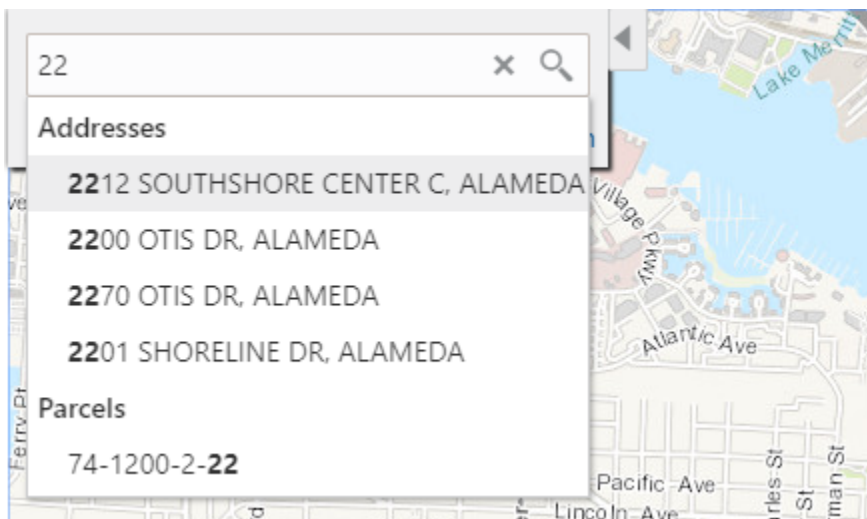
- Search for transactions and view transaction markers on the map.

All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user's own transactions appear.

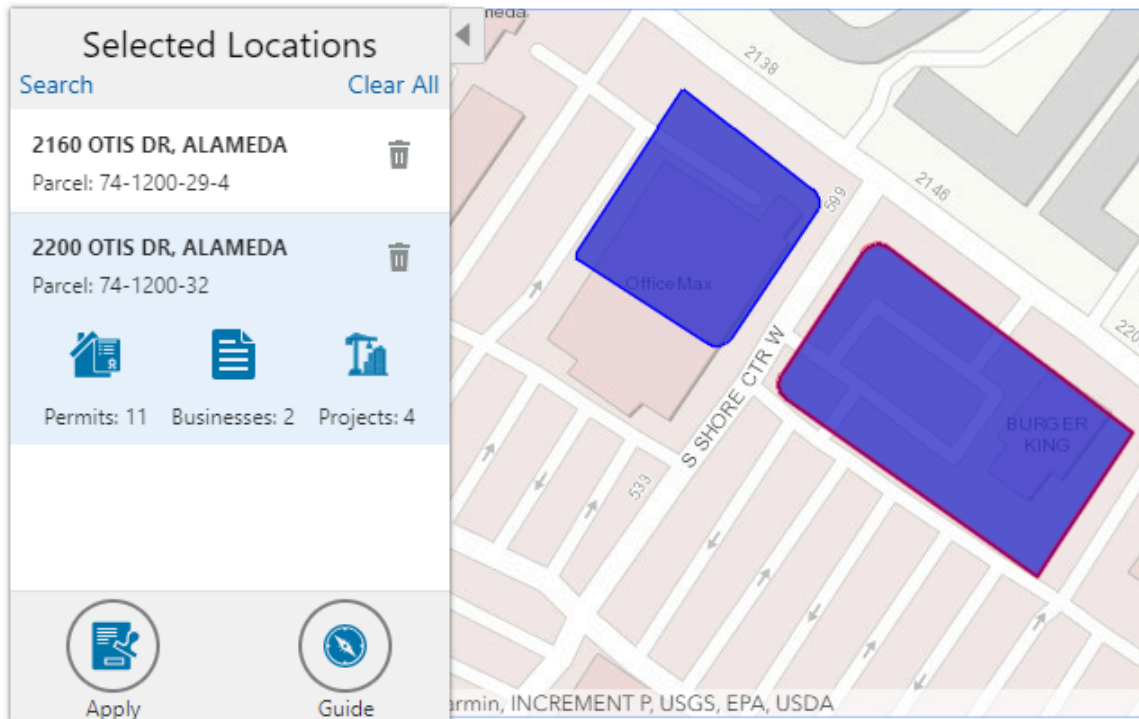
Note: To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience.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

Selecting Properties Using the Basic Search

This example illustrates the basic property search on the map.



This example illustrates the map when properties have been selected.



To search for properties and select them:

1. Enter a full or partial address or parcel number in the search field that appears when you first access the map.

As you type, up to five matching addresses and parcels appear in a type-ahead drop-down list. The type-ahead list includes headings to indicate which items are **Addresses** and which are **Parcels**.

2. Press the Return key or click the magnifying glass icon to perform a full search.

The Search window expands to show lists for Addresses and Parcels with a count for each type of result. Initially a maximum of five items appears in each list.

If more results exist, click **More** to show all results in a scrolling list. When the list is expanded, click **Less** to shrink the list back down to five locations.

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

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

4. To select additional properties without losing your selection, click the **Search** link to re-display the search field.

Each time you select a property, it is added to the Selected Locations list.

To return to the Selected Locations overlay from the Search overlay without performing a search, click the **Selected Locations** link. This link appears if at least one property is selected.

5. Use these options to deselect properties:

Page Element	Description
Delete	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
Clear All	Click this link to deselect all properties. The link appears at the top of the list.

Selecting Properties Using the Selection Toolbar





To select properties directly from the map, without searching, use the drawing tools. You can use the search and the drawing tools together to add properties to (and remove properties from) your list.



To select and deselect properties using drawing tools:

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

The drawing toolbar appears.

2. Use these tools to make your property selection:

Selection Toolbar Button	Description
 Draw a Point	Click one or more points on the map to select the properties that contain the points.
 Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All properties that intersect the resulting polyline are selected.
 Draw a Polygon	Click three or more points on a map to draw a polygon. The system redraws the polygon after each click. Double-click on the final point to stop drawing. All properties that are at least partially within the resulting polygon are selected.
 Deselect One	Click a selected property to deselect it. Note: Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.

Selection Toolbar Button	Description
 Deselect All	Click this button to deselect all properties.
 Close	Click to close the toolbar.

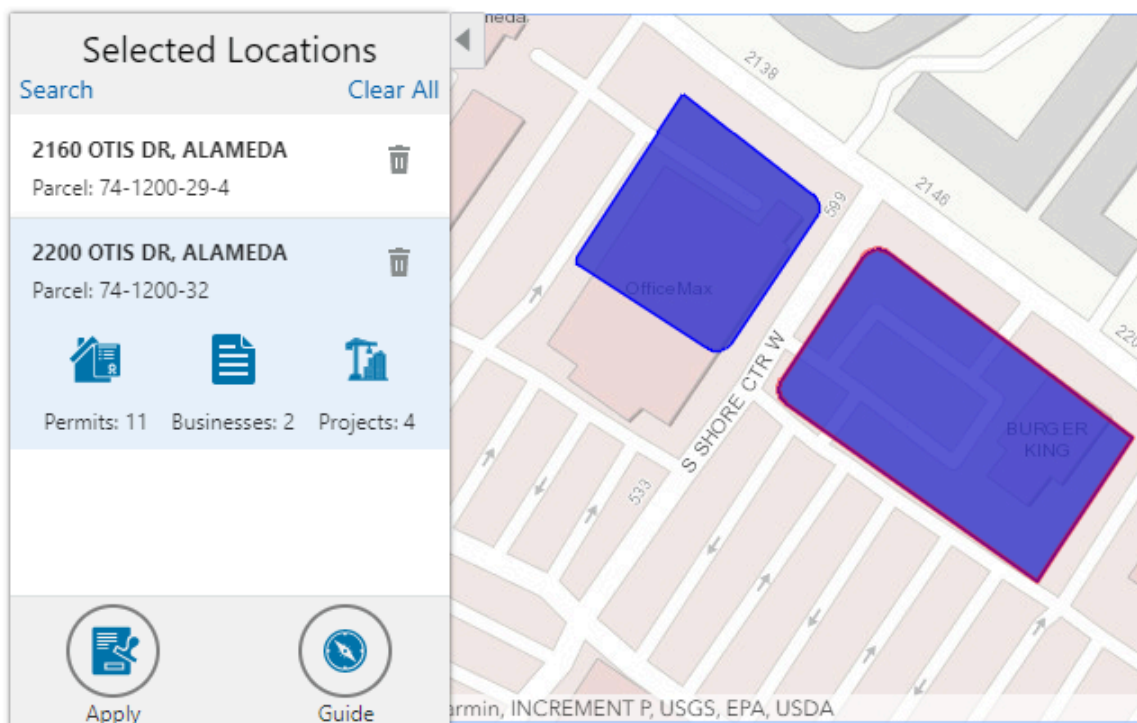
3. Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever properties are selected. This is a single list that also includes properties that you adding using the search.

Using the Selected Locations List

The Selected Locations overlay enables you to review information about selected properties and the transactions that are associated with those properties.

In this example of the Selected Locations list, the addresses and parcel numbers of selected locations are links to the corresponding detail pages. These links are only present for agency staff. When public users see the Selected Locations overlay, the addresses and parcel numbers appear as plain text.



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address. Agency staff can access the detail pages for selected addresses and parcels by clicking the address or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.

Note: If an address has multiple parcels, each parcel appears on a separate card and all parcels are selected on the map. If a parcel has multiple addresses, a link below the parcel number indicates the number of addresses. Click the link to see a list of addresses.

2. Click a card to select it and learn more about the property.

If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits, Planning Applications, Businesses** (business licenses), **Cases, Incidents** and **Projects**. The icon label includes a count of the related transactions. If the property is not associated with any transactions, the selected card looks the same as it does when it's collapsed.

3. Click the icon for a specific transaction type to access a list of transactions.

The list replaces the Selected Locations list and shows details that are relevant to the specific transaction type.

4. On the transaction list, click a transaction to open a new window with the corresponding detail page.

The details are read-only for public users. For agency users, access is based on the user's security. The window does not have any navigation controls, so close the window when you're done.

5. From a transaction list, click the return button in the window header to go back to the Selected Locations list.
6. To start an application for the selected properties, click the **Apply** button (not available to anonymous users).

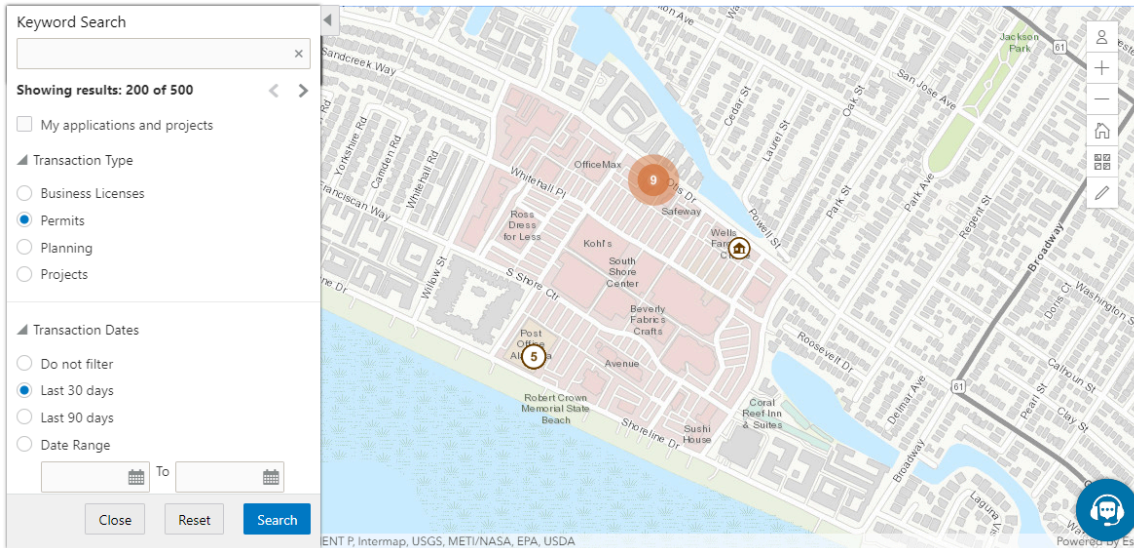
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

Users who aren't sure what type of application is needed can click the **Guide** button instead. This launches the guide that provides application type recommendations based on questionnaire answers. The Guide button is available only if an Oracle Intelligent Advisor definition is associated with the agency record.

Using Advanced Search to View Transactions

The advanced search is for searching transactions rather than properties. Use the advanced search to view map markers that indicate the locations of business licenses, permits, planning applications, cases, incidents and projects.

This example illustrates the advanced search.



Note: As agency staff, you will not see the check box used by registered public users to limit the search to their own transactions. If the registered public user is a primary contact for any projects, the check box label is **My Applications and Projects**. If the registered public user isn't a primary contact for any projects, the label is **My Applications**.

To show transactions on the map:

1. Click the **Advanced Search** link on the basic search overlay.
A new overlay appears.
2. Enter search keywords, if any, in the search field at the top of the overlay.
Search on data such as a business name or permit type. Don't use this field to search for addresses; use the basic search instead.
3. In the **Transaction Type** section, indicate which type of transaction to search.
Depending on which product offerings you enable, you can search for **Business Licenses, Permits, Planning** (planning applications), **Cases, Incidents or Projects**.
4. In the **Transaction Dates** section, choose a date range to search.
Options include **Do not filter, Last 30 days, Last 90 days**, or a custom **Date Range**. If you use a custom date range, enter a start date, end date, or both to define the range.
For date-restricted searches:
 - 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**.

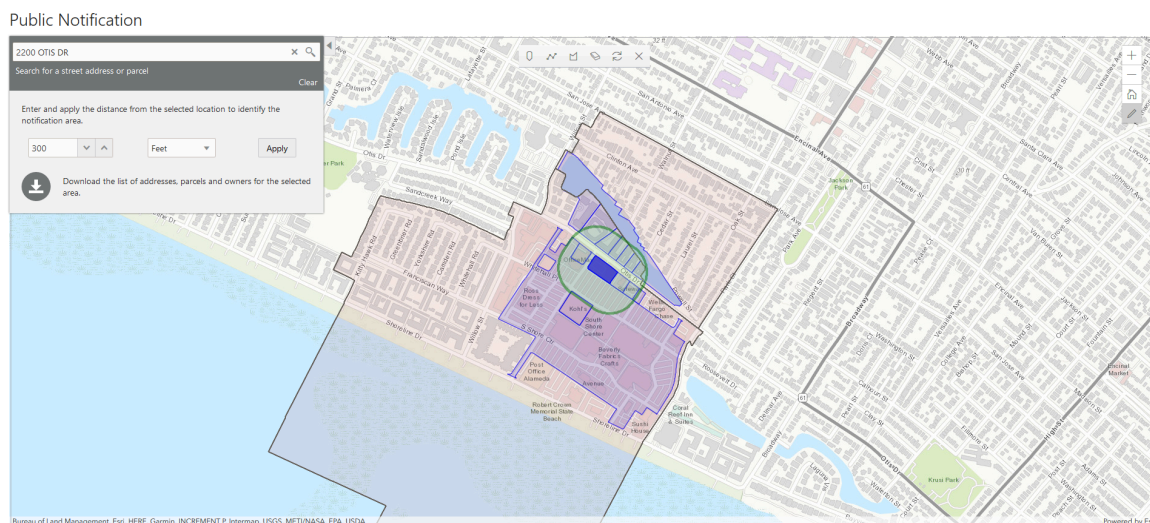
- To close the advanced search and return to the simple location search, click **Close**.

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:

- 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](#).

- 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.

- o 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.

9 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 PSC Finance Administrator PSC Cashier PSC System Administrator
PSC Planning and Zoning Fees Management	Add, update, and delete fees on planning applications.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Permits Fees Management	Add, update, and delete fees on permits.	PSC Inspections Supervisor PSC Chief Building Officer PSC Business Analyst PSC Principal Planner PSC Planning Coordinator PSC System Administrator

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

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 Permitting and Licensing](#).

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
Status	All new cashier sessions have a status of <i>Open</i> .
Cashier ID	Displays the unique ID of the cashier who is opening the cashier session. Administrators assign cashier IDs to agency staff on the Agency Staff page. You cannot open a cashier session if you do not have a cashier ID assigned to you.
Opening Balance	Enter the amount in the cash drawer at the beginning of the cashier session.

4. Click **Save**.

Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:
 - 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
Payment Method	Select between <i>Personal check</i> and <i>Cashier check</i> .
Actual Amount	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.

Page Element	Description
Check Number, Check Date, Payer Name, and Address	Update the check and payer information.
Comments	Enter any comments you want to add about the check payment.

5. Click **Save**.
6. On the Payment Details page, enter the actual amount for the cashier session for all receipts for the payment method. After you enter a value in the **Actual Amount** field, the page displays any overages or shortages in the **Total Overage** and **Total Shortage** fields.
7. Click **Save**.
8. On the Reconcile Cashier Session page, enter any comments you want to add for the entire cashier session and click **Save Reconciliation** to save all the changes you made for the cashier session.
9. Click **Complete Reconciliation**. This changes the status of the cashier session from *Unreconciled* to *Reconciled*. In addition, the **Save Reconciliation** button is replaced by the **Print Report** button, and the **Complete Reconciliation** button is replaced by the **Generate Event** button.

Note: Once you complete a reconciliation for a cashier session, you can't reopen it or make any adjustments to the session.

Printing a Cashier Session Reconciliation Report

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to print a reconciliation report.
3. Complete the reconciliation for the cashier session if you haven't already. You can print reconciliation reports only for sessions with a **Reconcile Status** of *Reconcile*.
4. Click **Print Report**. The generated report opens in a separate browser tab.

Note: If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Permitting and Licensing.

The Cashier Session Reconciliation report requires the definition of a parameter with the following values:

Page Element	Value
Parameter ID	1
Parameter Name	P_RECONCILE_ID
Parameter Data Type	String

For more information on defining parameters for reports, see [Setting Up Reports](#).

Generate Accounting Entries for Reconciliation Overages and Shortages

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to generate an accounting entry.
3. Complete the reconciliation for the cashier session if you haven't already. You can generate accounting entries only for completed reconciliations that result in an overage or a shortage.
4. Click **Generate Event** to generate an accounting entry for the overage or shortage.

Note: To successfully create accounting entries for cashier reconciliation overages and shortages, you must first create accounting rules for them. For more information on setting up accounting rules, see [Setting Up Accounting Rules](#).

Printing Deposit Slips

Agencies that collect payments use deposit slips to deposit the money collected in the form of cash and checks into the agency's bank account.

You print deposit slips using the Print Deposit Slip page.

Prerequisites

Before you generate deposit slips for your agency, you must define the P_DEPOSIT_SLIP_NUMBER parameter for the Deposit Slip (DepositSlip001) report. For more information on defining report parameters, see [Setting Up Reports](#).

Generating Deposit Slips

1. Select **Billing and Payment > Deposit Slip**.
2. On the Print Deposit Slip page, enter values for the following fields:

Page Element	Description
Agency ID	Select the agency for which you want to print a deposit slip.
From Receipt Date and To Receipt Date	Select the date range of receipts that you want to include in the deposit slip.
Payment Method	Select the payment methods that you wanted to include in the deposit slip. Options are Cash , Cashier Check , and Personal Check .
Cash Drawer ID	Select a value to print a deposit slip for the receipts of a specific cash drawer. If you leave this field blank, the deposit slip will include all cash drawers for the specified date range.
Session ID	Select a value to print a deposit slip for the receipts of a cashier session. If you leave this field blank, the deposit slip will include all cashier sessions for the specified date range.

Page Element	Description
Cashier ID	Select a value to print a deposit slip for the receipts of a specific cashier. If you leave this field blank, the deposit slip will include all cashiers for the specified date range.

Note: The values available in the Cash Drawer ID, Session ID, and Cashier ID drop-down fields represent the cash drawer payment history rows within the entered date range that have not yet been printed. Therefore, the values available in the drop-down fields change based on the entered date range. If a selected drop-down value becomes invalid because you change the date range, the field with the invalid value becomes blank. If the selected drop-down value remains valid after changing the date range, the drop-down value is unchanged.

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 Permitting and Licensing.

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 Payment Reference ID: CASH_20210615T151018882Z325254 Payment Transaction ID: RECT-2021-10006 Receipt Date: 6/15/21 Amount Due: 300.00 Amount Paid: 405.88 Currency: USD	Receivables Receipt Status: Created First Name: Peter Last Name: Skate Payer Name: 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](#).

Viewing Invoice History

Agency staff can view invoice history on the Invoice History page.

This example shows the Invoice History page.

Invoice History

Invoice	Invoice Date	Person Name	Invoice Amount	Invoice Currency
E2E-190830-00001	8/30/19	Alden Richards	148.80	USD
E2E-190830-00002	8/30/19	Carl Jones	148.80	USD
E2E-190830-00003	8/30/19	Alden Richards	148.80	USD
E2E-190830-00004	8/30/19	Alden Richards	148.80	USD
E2E-190830-00005	8/30/19	Alden Richards	148.80	USD
E2E-190830-00006	8/30/19	Carl Jones	148.80	USD
E2E-190830-00007	8/30/19	Alden Richards	148.80	USD
E2E-190830-00008	8/30/19	Alden Richards	148.80	USD

Page 1 of 12 (1-8 of 91 items) | Search | Show Default

Reviewing Invoice History

1. Select **Billing and Payment > Invoice History** in the navigator.

Note: Registered public users can also access this page from the Registered Public Landing Page by selecting *View Invoice History* from the **I Want To** field. Public users can view only their own invoices.

The Invoices History page displays all of the invoices issued by the agency. You can search for and sort invoices by:

- Invoice ID
- Invoice date
- Person name
- Invoice amount
- Invoice currency

2. Select an invoice to view additional details on the Invoice History Details page.

This example shows the Invoice History Details page.

Cancel Print Invoice

Invoice	E2E-190830-00001
Invoice Amount	148.80
Invoice Currency	USD
Invoice Date	2019-08-30
Person Name	Alden Richards
Address	12pine grove 12 SAN FRANCISCO California US
Description	E2E-190830-00015

Invoice Lines

Description	Line Amount	Invoice Currency
Electrical Fees	148.80	USD

The Invoice Lines grid displays the transaction lines associated with the invoice. You can select a invoice line to view additional details on the Invoice Line Detail modal page.

Click **Print Invoice** to generate a printable invoice.

Note: If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle Permitting and Licensing.

Viewing and Processing Refunds

Agency staff can view refund history, process refunds, and print refunds from the Refund History page.

Agency staff initiate refund requests from the Fees and Payments page for transactions. For more information on initiating refund requests, see *Working with Fees and Payments*.

To distribute requested refunds to customers, agency staff must review and process them on the Refund History page.

This example shows the Refund History page.

Refund History

Refund ID	Refund Type	Refund Method	Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processed Date
RFND_20191217T101050000299540	Chargeback	Credit card	12/17/19	145.00	USD	Refunded	Cancel	2019-12-17T10:12:32.060+00:00
RFND_20191217T0807440000265030	Refund	Offline	12/17/19	111.00	USD	Refunded	Cancel	2019-04-15T00:00:00+00:00
RFND_20191217T2242480000295571	Refund	Offline	12/17/19	111.00	USD	Refunded	Paid in error	2019-12-18T23:34:07.520+00:00
RFND_20191217T0641370000224132	Refund	Offline	12/17/19	123.00	USD	Refunded	Duplicate payment	2019-12-18T23:32:45.897+00:00
RFND_20191217T0936310000201719	Chargeback	Credit card	12/17/19	12.00	USD	Failed	Cancel	2019-12-17T09:38:01.582+00:00
RFND_20191217T0936310000260439	Refund	Offline	12/17/19	100.00	USD	Pending	Duplicate payment	
RFND_20191217T0828520000280097	Refund	Offline	12/17/19	300.00	USD	Refunded	Excess paid	2019-12-17T00:00:00+00:00
RFND_20191217T0732210000223043	Refund	Offline	12/17/19	111.00	USD	Refunded	Duplicate payment	2019-12-17T07:34:05.522+00:00

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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

Cancel Process Refund Void Refund

Refund ID: RPNID_20210727121418000021105E

Refund Type: Chargeback

* Refund Method: Credit Card

Refund Request Date: 7/27/21

Refund Amount: 322.08

Refund Currency: USD

Refund Status: Pending

* Refund Reason: Excess paid

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 Permitting and Licensing. 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 *Oracle Permitting and Licensing: 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_20210211T2211300002Z96E
 Payment Reference ID: CASH_20210211T221105005Z396669
 Payment Transaction ID: RECT-2021-10004

First Name: Aiden
 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 Search

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	Aiden	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 Oracle Permitting and Licensing.

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

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

10 Working with Accounting

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

This page displays the fee items for agency transactions that require accounting journals. Each fee item row displays the transaction ID of the transaction from which it originated and the name of the source table that contains the detail for that transaction. These accounting transactions are processed by the Generate Accounting process.

Viewing Accounting Transactions

1. Select **Accounting > Accounting Transactions**, or click **Accounting Transactions** on the Agency Springboard.
2. Select an accounting transaction on the Accounting Transactions page to view additional information about the transaction.

Each accounting transaction has one of the following statuses:

- *Created*: The Generate Accounting process couldn't create a journal for the accounting transaction because there is no applicable accounting rule.
- *Generated*: The Generate Accounting process created a journal for the accounting transaction.

For accounting transactions with a status of *Generated*, the **Journal** grid displays information about the journal entry associated with it including the Journal ID, Accounting Event, and Journal Status. For more information on journal entries, see [Reviewing Journal Entries](#).

The **Accounting Transaction Errors** grid displays any error messages associated with the accounting transaction. These errors must be corrected before a journal can be created for the transaction.

Generating Journal Entries

You generate journal entries from the accounting transactions that are created in Oracle Permitting and Licensing.

You run the process that generates journal entries on the Generate Accounting page, which you can access by selecting **Accounting > Generate Accounting**.

The Generate Accounting process includes only accounting transactions with a status of *Created*. The status of processed transactions is changed to *Generated*. The process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.

Entering Generate Accounting Process Parameters

1. Access the Parameters tab on the Generate Accounting page.
2. Select the **Accounting Event** for which you are generating journal entries.
3. Use the **Accounting Date From** and **Accounting Date To** fields to specify the range of accounting dates for which you are generating journal entries.

Scheduling the Process

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

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

Page Element	Description
<p>By day</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 Second and Wednesday 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>Note: 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>By date</p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p>Note: 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>Month</p>	<p>Select the months in which you want your process to run.</p> <p>Note: 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.

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:
 - o **Account**
 - o **Division**

- **Department**
 - **Fund**
 - **Function**
 - **Program**
5. Click **Save**.
 6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.

You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

You create a file containing accounting transactions that can be imported into an Enterprise Resource Planning (ERP) system.

When a *Publish Accounting* integration is enabled for your agency, the Export Journals to ERP process publishes accounting information to OIC where it can be transformed and imported by third-party applications. For more information, see *Setting Up Agency Integrations*.

Note: If you use Oracle Financials Cloud as your ERP system, we recommend using the Financials Cloud Subledger Accounting feature to enable ERP accounting integration instead of using the Export Journals to ERP process.

You run the process that exports journal entries on the Export Journals to ERP page, which you can access by selecting **Accounting > Export Journals**.

Entering Export Journals to ERP Process Parameters

Access the Parameters tab on the Export Journals to ERP page and enter values using the following fields:

Page Element	Description
Mapping Name	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see <i>Setting Up Data Format Exchange Maps</i> .
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.

Page Element	Description
Accounting Date From and Accounting Date To	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Scheduling the Process

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

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

Page Element	Description
<p>Weeks</p>	<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>Note: This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<p>By day</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 Second and Wednesday 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>Note: 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>By date</p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p>Note: 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>Month</p>	<p>Select the months in which you want your process to run.</p> <p>Note: 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.

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](#).

11 Working with Processes

Using the Process Monitor

The Process Monitor enables users to initiate and manage processes for Oracle Oracle Permitting and Licensing.

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=">"/>
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=">"/>

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
Actions	Click the icon in this column to select one of the following actions: <ul style="list-style-type: none">• <i>Put on Hold</i>• <i>Release Process</i>• <i>Cancel Process</i>
View More Details	Click to view additional information about the process on the Process Details page.

12 Using Accessibility Features

Overview of Accessibility

This topic provides an overview of the approach towards accessibility in the Oracle Permitting and Licensing offerings.

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

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

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

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

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

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

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

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

Using the Keyboard with Data Collections

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

Tables

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

Country

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

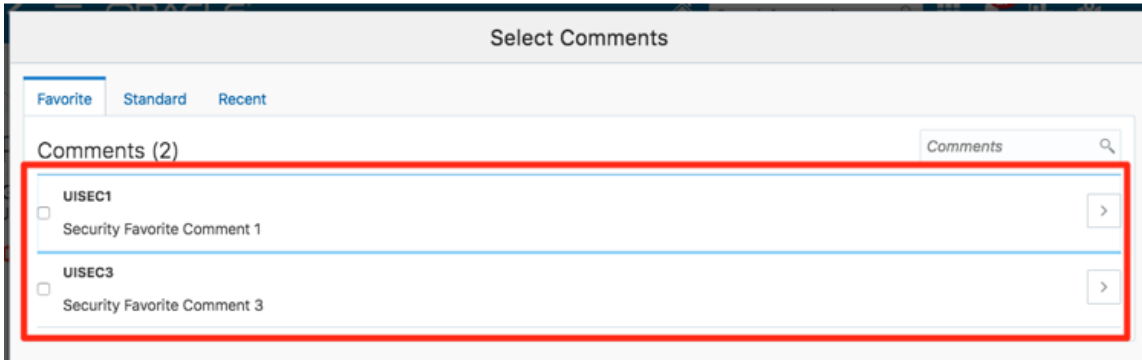
Page | 1 | of 22 (1-11 of 240 items) | < | 1 | 2 | 3 | 4 | 5 | ... | 22 | > | X

Target	Key	Description
Cell	Tab	<p>The first Tab into the table moves focus to the first column header.</p> <p>The second Tab moves focus to the next focusable element outside of the table.</p> <p>If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row.</p> <p>If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.</p>
	Shift+Tab	<p>The first Shift+Tab into the table moves focus to the first column header.</p> <p>The second Shift+Tab moves focus to the previous focusable element outside of the table.</p> <p>If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row.</p> <p>If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.</p>
	Down Arrow	Move focus to the next row.
	Shift+Down Arrow	Select and move focus to the next row.

Target	Key	Description
	Up Arrow	Move focus to the previous row. If at the first row, then move to the column header.
	Shift+Up Arrow	Select and move focus to the previous row.
	Home	Move focus to first row.
	End	Move focus to last row.
	Space	If chevron icon is used, drill down to the detail.
	Enter	Toggle the current row to actionable mode if there exists a tabbable element in the row. Once toggled to actionable mode, focus will be moved to be first tabbable element in the row.
	F2	Toggle the current row to actionable mode if there exists a tabbable element in the row.
Column Header	Tab	Navigate to next focusable element on page (outside table).
	Shift+Tab	Navigate to previous focusable element on page (outside table).
	Down Arrow	Move focus to the first row.
	Left Arrow	Move focus to previous column header.
	Right Arrow	Move focus to next column header.
	Home	Move focus to first column header.
	End	Move focus to last column header.
	Space	Select column.

List View

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



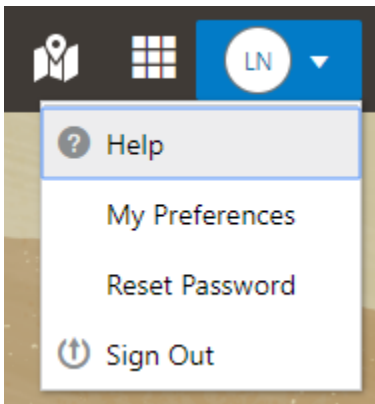
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item, unless the item is already selected.

Using the Keyboard to Work with Page Controls

This topic describes examples of how to use the keyboard to work with various controls in the interface and select actionable items. Controls are UI constructs such as buttons, accordions, page tabs, and so on.

Buttons

This section describes how to use the keyboard to control buttons in the global header or on pages.



Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

Calendar

This section describes the hot keys you can use when working with the calendar control and date picker to select date field values.

Auto Number Rule | Electrical Permit 🔍

* Valid from Date 📅

Valid to Date

Public User Enabled

* Department

Workflow Space Name

Workflow Application ID

< July 2018 >

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

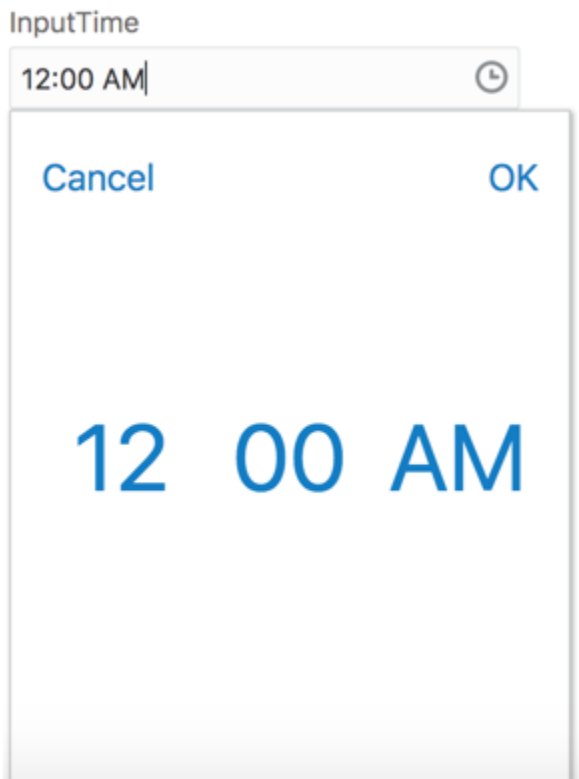
Today

Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calendar grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day
	Up Arrow	Move up in the grid.
	Down Arrow	Move down in the grid.
	Right Arrow	Move right in the grid.
	Left Arrow	Move left in the grid.

Target	Key	Description
	Esc	Close the grid.
	Home	Move focus to first day of the month.
	End	Move focus to last day of the month.
	Page Up	Switch to previous month.
	Page Down	Switch to next month.
	Alt+Page Up	Switch to previous year.
	Alt+Page Down	Switch to next year.
	Ctrl+Alt+T	Places focus on the Today button if it exists.

Time

This section describes the hot keys you can use when working with the time picker control to select time field values.



Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker
Tab In	Set focus to the input. If hints, title, or messages exist in a note window, displays the note window.

Accordion

This section describes the hot keys you can use when working with the accordion control to expose and access items. An accordion is a set of expandable sections where only one section can be expanded at a time. When a new section gets expanded, the previous section automatically closes.

Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements

- Group box
- Text field
- Number field
- Date time field
- Switch
- Text area
- Radio button set
- Check box set
- Drop-down list
- Multi-Select list

The following table lists the keyboard options for working with the collapsible headers.

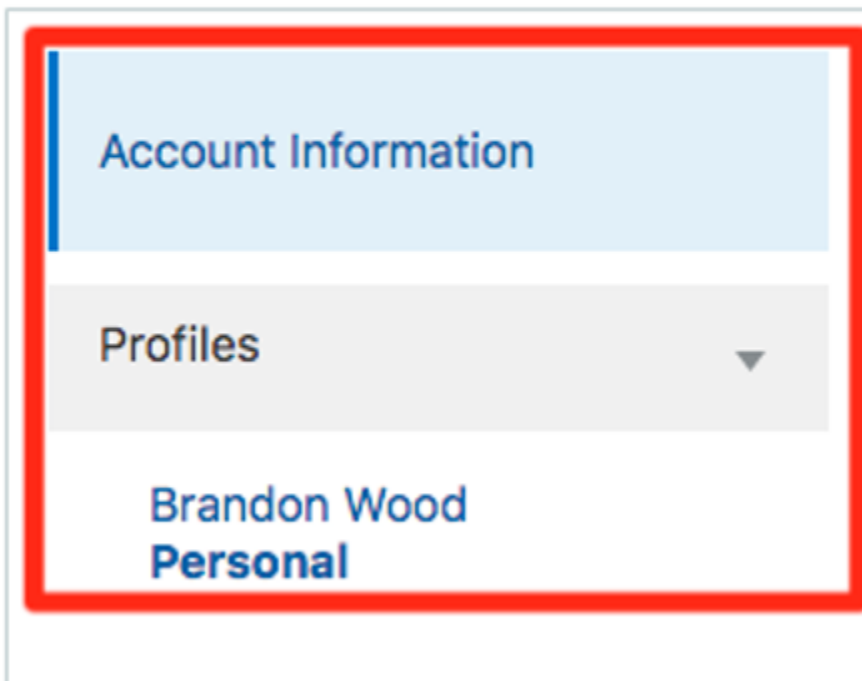
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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

Key	Description
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.
Home	Move focus to the first collapsible header.
End	Move focus to the last collapsible header.

Navigation Lists

This section describes how to use the keyboard to work with navigation lists to access items used take you to different locations or display additional content.

Manage Account



The following table lists the keyboard options used for accessing list items.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.

Key	Description
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift+Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

Tab Bars

This section describes how to use the keyboard to work with tab bars.



Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.

Key	Description
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl+X	Marks the current item to move if the reorderable feature is enabled.
Ctrl+V	Paste the item that are marked to directly before the current item
Delete	Delete the current item.