

# Oracle Public Sector Permitting and Licensing

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**Using Community Development  
Planning and Zoning**

23D



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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](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!

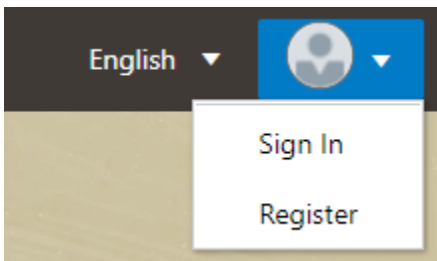


## 2 Managing Public Users

### 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 registrant enters information on the Register page.
3. The registrant accepts the registration terms of use, if required.
4. The registrant submits registration information.
5. A confirmation page directs the new account holder to complete the registration process by following instructions in an email that the system sends.
6. The account holder clicks the link in the email to set up the account password.
7. The account holder submits the password to complete the registration process.
8. The system takes the account holder to the registered public user landing page.

To sign in again in the future, the account holder 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

Hide my contact information from public view

\* First Name

\* Last Name

Business Name

Business Title

Your email address is your user name.

\* Email Address

\* Confirm Email Address

Country US

Postal Code

[Don't know](#)

If you don't know your Postal Code, select the Don't Know the Postal Code link to enter the full address.

Phone  1  Ext

You can access permit and business license information and manage your inspection schedule by phone.

You will need this 4-digit access code every time you call into the automated phone system.

If you forgot your access code, you can reset it on the account management page.

Click the help icon for more information.

IVR Access Code

[Terms of Use City of Innovation as of 2023](#)

Read and accept the terms and conditions before proceeding



## Entering Registration Information

Users enter the following registration information.

Page Element	Description
<b>Hide my contact information from public view</b>	<p>Gives the registrant the option to hide their name and contact information when a member of the public views their applications.</p> <p>This question appears only if enabled by the agency on the Public User Setup page.</p> <p>The default answer to this question is <i>No</i>.</p> <p>You can access help for this question by clicking the question mark icon adjacent to the question. The help explains that even when the registrant's own information is hidden, the property addresses for all applications are visible to the public.</p>
<b>First Name and Last Name</b>	Enter the registrant's name, which will appear on the account profile created by the registration process.
<b>Business Name and Business Title</b>	Enter the registrant's business name and business job title, which will be associated with the profile created by the registration process. A business name is optional, but if you enter a business name, you must also enter the registrant's business job title.
<b>Email Address and Confirm Email Address</b>	<p>Enter an email address that will be associated with the registrant's account. Enter the email address again to confirm.</p> <p><b>Note:</b> The registrant'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 registrant submits registration information, the system sends an email to this address. The email contains a link that they need to complete the registration process.</p>
Address fields	<p>Enter the mailing address that will be associated with the registrant's account.</p> <p>The <b>Country</b> field displays <i>US</i> for the United States.</p> <p>When you enter a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.</p> <p>If you don't know the postal code, you can click the <b>Don't know</b> link to display the full set of address fields.</p>
<b>IVR Access Code</b> (Interactive Voice Response Access Code)	<p>Add a 4-digit PIN that is required when public users accessing inspections for applications using the agency's interactive voice response (IVR) system.</p> <p>The code is masked on this page, and you can't see this code again even after registration is complete. Users who forget their code can reset it on the account management page. For information about entering a new code after registering, see <a href="#">Managing Public User Accounts</a>.</p> <p>This field appears only if the agency enabled IVR access codes on the Public User Setup page. See <a href="#">Setting Up Public Users</a>.</p>

Page Element	Description
	When you enable the <b>IVR Access Code</b> field, help information indicates whether the IVR access code applies to permits or business licenses, or both.
<b>Phone</b>	Enter a phone number for the account holder. This field is optional.

After entering information and agreeing to the terms and conditions, if required, click the **Register** button.

## Agreeing to Terms and Conditions

The Public User Setup page specifies whether public users must agree to terms and conditions. If registrants 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.

When the terms of use are required, 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 registrant clicks the link to open a new window. The window displays the complete text of the terms followed by a check box that indicates **I have read and accepted the terms and conditions**. The registrant must select the check box to continue the registration process.

After the registrant accepts the terms and continues, the main Register page displays a selected agreement check box instead of instructions. The link to the detail window is still available, and the registrant can return to the window to reread the terms or rescind agreement.

**Note:** If the terms of use change, account holders who have already registered are required to accept the new terms. When an account holder 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 the agency changed 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 account holder 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

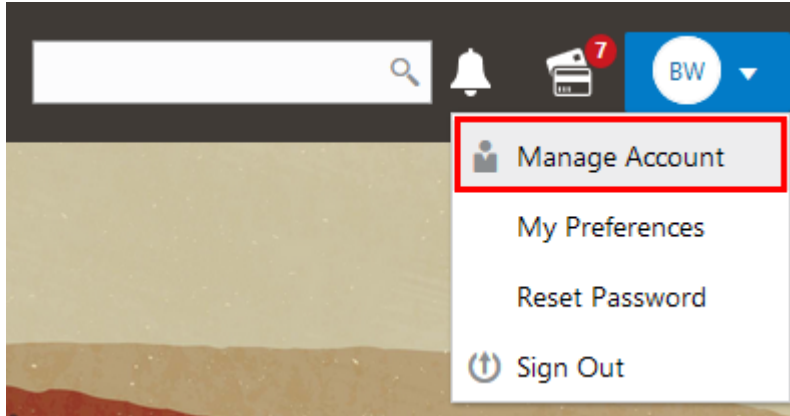
To access self-service account management functionality, a public user who has signed in follows these steps:

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

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

A drop-down menu appears.

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



- Select **Manage Account**.

## Managing Public User Accounts

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

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

## Security Details for Managing Public User Accounts

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

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

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

- 5. To view or update additional information:

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

The Additional Information page appears.

- b. Review or update the setting to **Hide my contact information from public view**.
- c. Click **Save** to save any changes and close the page.

6. To review the most recently accepted terms of use:
  - a. Click the **Terms of Use** item in the right frame.

A window with the full text of the terms of use appears.

When a public user views this information, the terms are always current as of the time the user signed into the current session. This is because users must agree to any changes in the terms of use when signing in.

When agency staff views this information, they see the terms that the user last accepted, even if the agency has changed the terms since then.

- b. Click the **Close** icon in the top right corner of the window to close it.
7. To view conditions that have been applied to the account:

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

A window that lists account-level conditions appears. Active conditions are first, followed by resolved conditions.

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

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

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

## Managing Account Attachments

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

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

To manage account attachments:

1. Access the Manage Account page.

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

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

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

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

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

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



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

4. To add a new attachment:

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

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

5. To view or modify attachment information:

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

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

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

You are prompted to confirm the deletion.

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

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

## Viewing the Account Profile

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

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

To view the summary information for the profile:

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

Profile Section	Information Displayed
Profile Basics	The profile type: <i>Personal</i> or <i>Business</i> .
Profile Information	Manage the business name, the account holder's job title for the business, and business type.
Contact Information	The number of contact methods for the profile.
Contacts	The number of contacts for the profile.
Licenses	The contractor and license information is display-only, including the number of licenses for the profile and whether the profile has contractor status.  If a self-reported contractor status appears, you can access the license details to see if the status was 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
<b>Profile Name</b>	The identifying name for the profile. This name appears in the page header and on the Manage Account page.  The name for the profile that is created during the registration process is the public user's first and last name. This name is truncated if it's longer than 60 characters.
<b>Default</b>	The profile that gets created during the registration process is the default profile. The check box is read-only.
<b>Profile Type</b>	Displays either <i>Personal</i> or <i>Business</i> based on a business name entered during registration. You can't change the profile type.
<b>Status</b>	Displays <i>Active</i> to indicate that the account profile is active and can be updated.

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

## Managing Contact Information

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

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

To update contact information:

1. Access the Manage Account page.
2. Select the profile name in the left frame.
3. Click the **Contact Information** section to open the Contact Information page.
4. To add or modify a contact method:
  - a. If you are adding a contact method, click **Add** in the appropriate section (Address, Phone, or Email) to open the Details page.
  - b. If you are updating a contact method, click the **View More Details** button at the end of an existing row to open the Details page.
  - c. Select the **Type**.  
The Details page displays different fields depending on the type of contact method, but all contact methods include the **Type** field. Address types are *Home* and *Work*. Email and Phone types are *Home* and *Business*.

- d. If you're adding a new address, either enter the **Postal Code** or click the **Don't know** link.

As you enter a **Postal Code**, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address. If you don't know the postal code, clicking the **Don't know** link displays a full set of address fields.

If you accessed an existing address, the additional address fields are already visible.

- e. Enter the complete contact information: either an address, a **Phone** and **Ext** (extension), or an **Email**.
- f. If this will be the primary address, phone number, or email, select the **Primary** check box.

Only one contact method of each type can be primary, so if you select the check box, the previous primary address, phone number, or email (if any) is updated to no longer be primary. When there is only one contact method of each type, it is automatically primary.

- g. Click **Save** or **Cancel** to close the Details page and return to the Contact Information page.
5. To delete a contact method, click **Delete** for the appropriate row.
6. Click **Cancel** to return to the Manage Account page.

## Managing Contacts

Contacts are people who can interact with the agency regarding business related to the associated account.

To manage contacts:

1. Access the Manage Account page.
2. Select the profile name in the left frame.
3. Click the **Contacts** section to open the Contacts page.
4. If you are adding a contact, click **Add** to open the Contact Details page.
5. If you are updating a contact, click the **View More Details** button at the end of the row to open the Contact Details page.
6. On the Contact Details page, enter the contact's **First Name**, **Middle Name**, **Last Name**, **Business**, and business job **Title**.
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.

## Viewing Licenses

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

If your agency required staff to verify contractor status and professional licenses, staff members who access the information can view the verification statuses for both types of information. Public users can also see the verification statuses.

To view 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 these fields related to the user's contractor status:

Page Element	Description
<b>Are You a Contractor?</b>	Indicates the contractor status, either <i>Yes</i> or <i>No</i> .
<b>Verification Status</b>	This field is visible if the Public User Setup page was configured to require license verification.  The values can be <i>Pending verification</i> , <i>Verified</i> , or <i>Verification failed</i> .

5. To view details about an existing license, click the row for the license.  
The License Details page opens.
6. Review the following fields on the Licenses page:

Page Element	Description
<b>License Type</b>	The type of license, such as a General Contractor license or an Electrical Contractor license.
<b>License ID</b>	The license number that uniquely identifies the license.
<b>Start Date</b>	The date that the license became valid.
<b>Expire Date</b>	The date that the license expires or requires renewal.
<b>Verification Status</b>	This field is visible if the Public User Setup page was configured to require license verification.  The values can be <i>Pending verification</i> , <i>Verified</i> , or <i>Verification failed</i> .

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

## Managing Account Profile Attachments

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

Attachments can be associated with either the account or with the account profile. The account-level list includes all attachments.

To manage account profile attachments:

1. Access the Manage Account page.

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

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

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

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

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

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

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

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

5. To view or modify attachment information:
  - a. Click the **Actions** icon and select **View Details**.
  - b. On the Attachment Details page, review the **File Name**, the **File Size**, and the **Last Updated By** and **Uploaded By** user names.
  - c. Optionally update the **Description**.
  - d. If document groups are enabled for public users, optionally update the **Category** and **Subcategory**.
  - e. Click **Save** or **Cancel** to return to the Attachments page.
6. To download a file, click the **Actions** icon and select **Download**.
7. To delete a file, click the **Actions** icon and select **Delete**.

You are prompted to confirm the deletion.

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

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

## Managing 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.

## Overview of Application Access for Contacts

All application contacts must have a contact type that describes the role of the person relative to the specific application, such as business manager, contractor, or organization. Different contact types have different levels of application access, as set up by your agency, but applicants, the primary contact, and business owners on business license applications always have the highest level of access and can manage other contacts.

When an applicant submits an application, they are automatically assigned the *Applicant* contact type, which is delivered with full application access and can't be modified.

Business owners on business license applications are automatically assigned the *Business Owner* contact type that gives them access to business license applications as contacts. This contact type is only valid for business license applications.

When you add a contact to an application, you select a contact type. The application access level defined by the agency is used unless you select a higher level of access. For a given business license, permit, or planning application, if a contact's type allows access or the contact has been granted access, *and* the contact email matches the account email for a registered user, then the contact can access the application after the application is submitted.

The contact types and levels of access that a contact can have are different for business licenses and permit and planning applications:

- Business license application contacts can have three levels of access: None, Full, or View, pay, and print to view the application, pay fees, and print the business license certificate. In addition to the business license application, business license contacts can view the business license and business entity information.
- Contacts for permit and planning applications can have two levels of access: None or Full.

Contacts with application access can see both their own applications and the applications they're a contact for. To access the application, the contact can search for it using the search field in the global banner or click the **Applications** tile on the landing page once they're logged in.

**Note:** Before contacts can manage attachments, comments, and 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.

## Application Access Details

Contacts with full application access can do the following. For more information about the primary contact's application access, see the next section.

- View complete applicant information, including information that is hidden from the general public.
- View permit and planning application plan review data and comments.
- Add and update contractors, including activating or inactivating a contractor on a permit or planning application.
- View comments, including workflow comments.
- View contacts and attachments.



- Manage contacts.  
Contacts with full access can manage contacts except for the applicant, primary contact, or business owners.
- Add and update comments, and attachments until the application is closed.
- Delete comments and attachments that the contact added.
- View permit and planning application inspections, inspection comments, and inspection checklists.
- Schedule permit and planning application inspections.
- View fee information.
- Print the permit, and print payment receipts.  
Business license contacts with Full or View, pay, and print access can print the business license certificate.
- Make payments related to a permit or planning application.  
Business license contacts with Full or View, pay, and print access can make payments related to the business license.
- View communications that are visible to the applicant. However, only applicants can access web forms and web form attachments.

Contacts can also add or delete links to related transactions on the permits or planning applications they manage, but you must grant registered public user access for managing links to related transactions in the agency setup. For more information, see [Setting Up Agencies](#).

**Note:** The setup for owner access or contact access control is not universal across all functions. For example, if the agency sets the ability to link or relate transactions to agency only, the applicant, business owner, or contact with application access will still not be able to do so.

## Primary Contact

The applicant is the primary contact unless the applicant selects a different primary contact on the application form or after the application is submitted. A contact with any contact type can be a primary contact. Primary contacts always have the same access to an application as the applicant, including the ability to manage other contacts. Applicants and primary contacts can upgrade another contact's access or make a different contact the primary contact.




Business owners with full access as well as applicants and primary contacts can manage other contacts, including changing the primary contact and upgrading a contact's level of access to an application.

## Managing Account Conditions

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

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

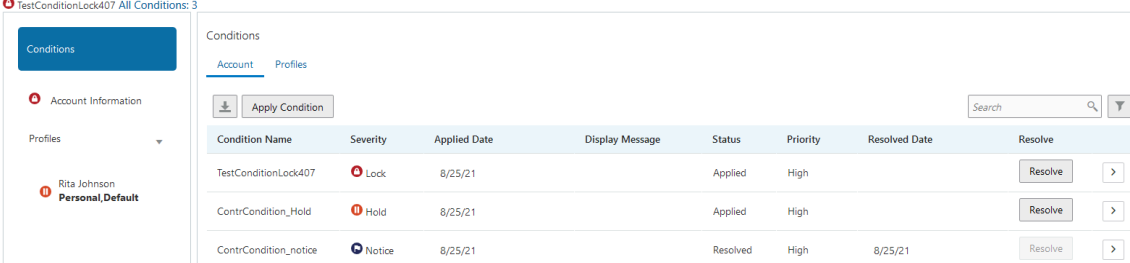
A condition's severity determines how the condition affects activities. This table describes each severity level.

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

## Viewing Conditions and Condition Indicators

This example shows condition indicators on the Manage Account page.

Manage Account



TestConditionLock407 All Conditions: 3

Condition Name	Severity	Applied Date	Display Message	Status	Priority	Resolved Date	Resolve
TestConditionLock407	Lock	8/25/21		Applied	High		Resolve >
ContrCondition_Hold	Hold	8/25/21		Applied	High		Resolve >
ContrCondition_notice	Notice	8/25/21		Resolved	High	8/25/21	Resolve >

To view active conditions for a public user account:

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

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

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

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

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

Page Element	Description

- Review any icons next to the account or profile name in the left frame.

The icons indicate the highest level of severity of the active conditions for the account or profile.

- (Agency staff only) Click the Conditions tab in the left frame.

This tab is not visible to public users.

- In the right frame, click the **Account** and **Profiles** links to toggle between a list of account-level conditions and profile-level conditions.

These lists include resolved conditions as well as active conditions.

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

## Adding Conditions

To add account and profile conditions:

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

Page Element	Description
<b>Condition Name</b>	Select one of the conditions that the agency has defined.  After you select a condition, the condition information is brought in as it was defined by your agency administrator. You can override the default rules, priority, description, and additional information to customize the condition.
<b>Display Message</b>	Displays an informational message that also appears in the list of all active conditions for an account.
<b>Severity</b>	Displays the severity of the selected condition: <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>

Page Element	Description
<b>Condition Rules</b>	<p>Displays check boxes for indicating which actions are locked down. If a check box is not selected, the action is permitted.</p> <p>The check boxes are selected and read-only if the severity is <i>Lock</i>. They are hidden if the severity is <i>Notice</i>.</p> <p>If the condition severity is <i>Hold</i>, the selected check boxes are brought over from the condition definition. You must select at least one check box.</p> <p>The <b>Prevent Application Progress</b> check box is always visible because all conditions affect new applications.</p> <p>Check boxes for these condition rules are visible only if the <b>Apply Conditions to Transactions</b> switch is enabled.</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul>
<b>Priority</b>	Select <i>High</i> , <i>Medium</i> , or <i>Low</i> .
<b>Description</b>	The default description comes from the condition definition, but you can change this description as needed.
<b>Additional Information</b>	Enter any additional information or notes regarding the condition that you're applying.

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

Page Element	Description
<b>Apply Condition to Transactions</b>	<p>Applies the condition to new transactions that will be associated with the account or profile. You turn off the switch if you want the condition to be applied only to the transaction you're working with.</p> <p>When you enable this switch, the complete set of condition rule check boxes becomes visible in the <b>Condition Rules</b> section of the page. If the severity is <i>Hold</i>, you can accept the default selections or select which condition rules to apply.</p>

Page Element	Description
	<p>If this switch is not enabled, the only relevant condition rule (and the only visible condition rule check box) is <b>Prevent Application Progress</b>.</p> <p>The default setting for this switch comes from the condition definition, but you can change the setting.</p>
<b>Include in-process transactions</b>	This check box is visible only if the <b>Apply Condition to Transactions</b> switch is enabled. Select this check box to apply the condition to all active applications for this account or profile.
<b>View Impacted Transactions</b>	Click this link to open a window that lists the in-process applications that will be impacted if you select the <b>Include in-process transactions</b> check box.

8. Click **Save**.

## Resolving Conditions

To resolve a condition:

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

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

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

3. Locate the condition to be resolved.

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

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

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

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

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

## Viewing or Updating Condition Details

1. Access the Manage Account page.

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

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

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

3. Review summary information for conditions.

Active conditions are listed before resolved conditions.

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

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

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

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

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

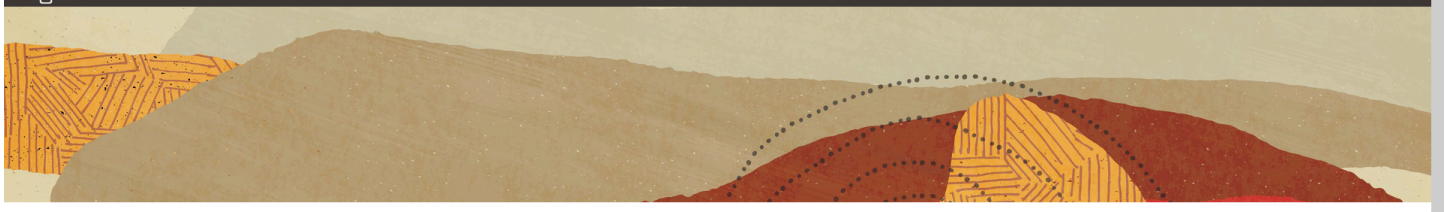

All fields are read-only except that if an active condition has a severity of *Hold*, the condition rule check boxes are editable.

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

## Overview of Public Landing Pages

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

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




Citizen Service Center


One centralized place for citizens and business to connect with our city. [Read More](#)

I Want To


Payment Due Total 9,965.40 USD   
19 Applications




Apply




Estimate Fees




Explore Your City




Guide



Report An Issue



Applications: 172  
Hold Condition Applied



Business Licenses: 1



Inspections: 5



Request Inspections



Projects: 1



Businesses: 20



Deposit Accounts



## 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
<b>Apply</b>	Provides access to a page where the user can choose an application type and then start an application.
<b>Estimate Fees</b>	Provides access to the Estimate Fees page, where the user can chose an application type and estimate fees for an application.
<b>Guide</b>	<p>Provides access to a questionnaire. The user provides information about a project, and the guide uses that information to recommend application types.</p> <p>Your agency defines the guide questionnaire using Oracle Intelligent Advisor. If your agency is not using Oracle Intelligent Advisor, this tile will not appear.</p> <p>The questionnaire comes from the Oracle Intelligent Advisor policy model that you specify for the <i>Permits</i> offering, if one exists. If there's no offering-level policy, the questionnaire comes from the agency-level Oracle Intelligent Advisor policy model.</p> <p>For more information on identifying the Oracle Intelligent Advisor policy model to use, see <a href="#">Setting Up Agencies</a></p>
<b>Explore Your City</b>	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, contacts with application access, and so on, who are registered in the system. When a registered user is signed on, the landing page can include additional options related to the registered user's interactions with your agency.

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



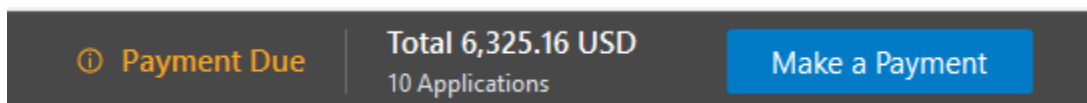
Menu Link	Description
<b>Report an Issue</b>	<p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.</p> <p>See <i>Reporting Issues</i>.</p>
<b>Applications</b>	<p>Displays a list of the user's own applications, including business license, permit, and planning applications. From the list, the user can access application details.</p> <p>The list has a regular list view, a grid view, and a map view. There is also a <b>Show All Statuses</b> switch for toggling between a list of active applications and all applications.</p> <p>The number of active applications appears in the tile label. This number includes both permit applications and planning applications.</p> <p>If one or more conditions have been applied to the user's applications, a conditions icon appears below the tile. The icon associated with the most severe condition is displayed. For example, if there is a permit application with a lock condition (which prevents further activity on the permit) and another application with a notice or informational condition, only the lock icon appears below the tile.</p>
<b>Inspections</b>	<p>Displays a list of the user's inspections. From the list, the user can access inspection details and schedule additional inspections.</p> <p>Public users can view the number of inspections associated with the applications they have access to as a contact or applicant on the tile.</p>
<b>Request Inspections</b>	<p>Displays the page where you can request one or more inspections for a transaction. Registered public users can also add inspections from their Inspections list page by selecting the <b>Inspections</b> tile.</p>
<b>Projects</b>	<p>Displays a list of projects where the user is a contact. Projects are large undertakings that involve multiple applications. Agencies, not users, determine which undertakings are considered projects. A user's own project is a project where the user is the primary contact.</p> <p>This tile is hidden from users who do not have any projects.</p> <p>The number of active and completed projects appears in the tile label.</p>
<b>Businesses</b>	<p>Displays a list of the businesses associated with the user's business licenses. This tile is visible only if the user has at least one active business. The number of active businesses appears in the tile label.</p> <p>Users can review summary information about a business and click an individual business for additional details.</p> <p>The list displays the business ID, legal name, mailing address, and location.</p>
<b>Business Licenses</b>	<p>Displays a list of the user's own business licenses. The tile is visible only if the user has at least one active business license. The number of active business licenses appears in the tile label.</p> <p>The list displays summary information about licenses, including the license ID, license type, license status and expiration, the license period, the business name and physical address, a description, and fee information. The user can also initiate an amendment or renewal from the list.</p> <p>The <b>Show All Statuses</b> switch toggles between a list of active licenses and all licenses.</p> <p>Users can click individual licenses for additional details or to take any actions such as viewing the certificate.</p>

Menu Link	Description
<b>Deposit Accounts</b>	Displays a list of the user's deposit accounts, including the account number, name, and status, in addition to the available balance. From the list, the user can access deposit account details.
<b>Deposit Account User Invites</b>	Displays a list of the invites that the user has received to manage deposit accounts. It displays the account number and name, email address and invite status. From the list, the user can access the invite details.  Owners of deposit accounts can void the invite.  Invited users can accept or decline the invite.

## 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 Completing a Planning Application

## Security Details for Completing a Planning Application

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

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

## Choosing an Application Type

Your agency sets up application types for permit applications, planning applications, business license applications. Business licenses applications include consultations and contractor registration. 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.

City of INNOVATION

# Apply

Start your application by choosing one of the options from the list.

- Business Licenses
- Permits
- Planning Applications
- Guide

[View Recommendations](#)  
*Recent and Popular*

Start your application by choosing one of the options on the page.

Chat icon

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. Here the user is browsing for business license types, so the overlay shows expandable categories for those applications.

The screenshot shows the 'Apply' page on the City of Innovation website. The left sidebar contains a search bar and a list of application categories: Business Licenses (highlighted in blue), Permits, Planning Applications, and Guide. Below the list are links for 'View Recommendations' and 'Recent and Popular'. The main content area is titled 'Business Licenses' and includes a 'Clear Selection' button and an 'Apply: 1' button. The content is organized into sections: 'Business Coaching' (with a description of coaching services), 'Business Licenses' (with a description of the application process), and 'Contractor Registration' (with a checked checkbox and a list of registration options: 'Single Contractor Registration' and 'Multiple Contractor Registration', each with a brief description of the form's purpose). A chat icon is visible in the bottom right corner.

The descriptions of the categories and the application types come from the corresponding setup pages.

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 the **Recent and Popular** link.
2. Review the 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.



List	Description
	<p><b>Note:</b> Anonymous public users do not see a list of recent application types.</p>
<b>Popular</b>	List the application types (up to five) that have been used most often in the last 30 days.

- To start an application, click **Apply** for the desired application type. You can also estimate the fees associated with the applications, even before starting the application process. Click the **Estimate fees** icon, to launch the guided questionnaire in a new window to estimate the fees for the selected application.

## Browsing for Application Types

To browse for application types:

- Click the button for **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.

- Expand categories to browse the application types.
- To start an application, click **Apply** for the desired application type. When there are fees associated with the applications, you can estimate the fees even before starting the application process. Click the **Estimate fees** icon, to launch the guided questionnaire in a new window to estimate the fees for the selected application. For details, see [Estimating Fees](#).

## 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:

- 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.

- Step through the questionnaire.

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

### 3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

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

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

An anonymous user follows these steps to save the recommendations:

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

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

## Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

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

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

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

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

## Getting an Online Fee Estimate

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

## Estimating Fees Using A Simplified Intake Form

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

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

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

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

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

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

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

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

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

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

## Completing an Application

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

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

This example illustrates an application.

## Single-Page View and Multiple-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.

**Note:** When conditions are applied by agency staff to a parcel, address, person, contractor license, or business license with the Prevent Application Progress option enabled, then the application may prevent you from submitting any new application that contains the object. Click the condition icon that is displayed next to the Application record ID field to see the list of conditions. Only agency staff can drill down to the Conditions details page for each condition by clicking the Source Reference link. They must resolve conditions before applicants can proceed with submittal.

## 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 Planning Application interface. At the top, there is a navigation bar with the Oracle logo, a home icon, a search bar, and several utility icons. Below the navigation bar, there is a status bar with a 'Close Application' button, 'Status: draft', 'Step 2 of 3: Page 3', and 'Save', 'Previous', and 'Next' buttons. The main content area is titled 'Building Permit' and contains a 'Project Items' section. 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).

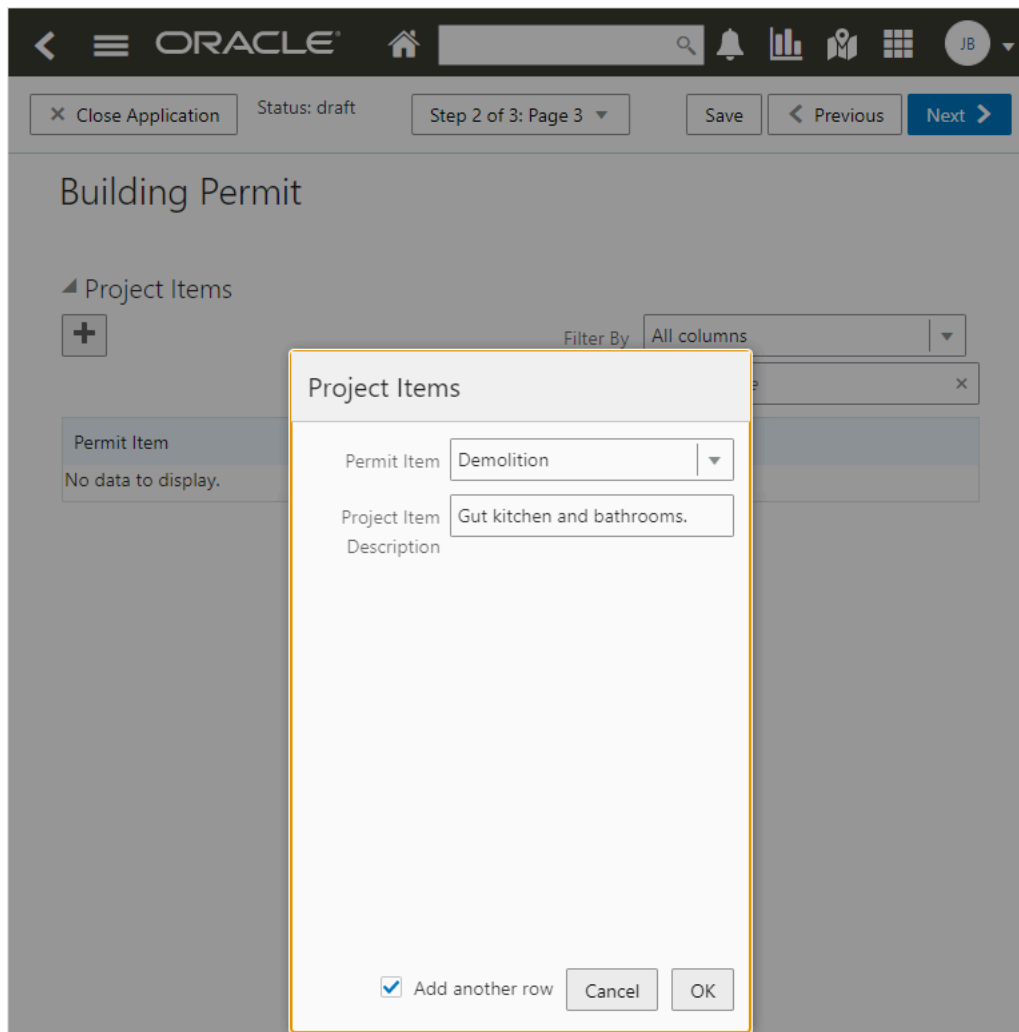
A pop-up dialog box appears where you can enter your data.

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.



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** drop-down 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 can provide the date the application was received while entering data into the system. The received date field isn't available for applicants applying online.

The received date determines the effective dated fee schedule that will be used when calculating fees for the application.

To define the start and end dates of a fee schedule, see [Setting Up Fee Schedules](#).

## Adding Multiple Applications to a Permit Application

Projects involving multiple permits can include existing required applications into the same intake form. The Oracle Permitting and Licensing system enables you to create a primary permit application and associate multiple subapplications with it.

**Note:** This option is only available for permit applications.

The following graphic displays the options for the Primary and Subapplication section on a permit intake form:

## Primary and Subapplication

### Does your application require multiple permits?

If you want to add multiple permit applications, select yes. If you select no, you will submit a single application.

- Yes  
 No

### Select the application link type


If you mark your application as primary, you can link subapplications to it.

If you mark your application as subapplication, you can link a primary application to it or submit it as a single application.

- Primary  
 Subapplication

Search the primary application by using parameters such as application, type, or parcel.

Expand search to include all properties



On the intake form, the default selection for the question **Does your application require multiple permits?** is **No**. You can proceed with the next steps, review, and submit the form as an independent application (neither a primary application nor a subapplication).

When you can select the option Yes for the question **Does your application require multiple permits?**, you can mark the application as one of these options:

- **Primary:** The current application becomes your primary application. Proceed with the next steps and submit the application. If available, you can use the Related Transactions section to link subapplications before submission, or subsequently access the submitted primary application and link existing or new subapplications to it.
- **Subapplication:** The current application becomes your subapplication. To establish a link to the primary permit—you can either search and select an existing application and link it as the primary, or proceed with the next steps and submit the application without any linking. Later when required, access the submitted application and create a primary link between your subapplication and an existing permit application. Use one of these methods to select an existing application:
  - Begin typing the name or ID of the desired application, type, or parcel in the search field. Select the resulting permit.
  - Click the lookup prompt to open the search page and view only the permit applications that are available for primary assignment—permits marked *Primary* as well as independent permits (neither primary nor subapplication). Select the desired permit to close the modal and return to the intake form.



**Note:** By default, the search page lists permit applications that are associated with the property entered in the intake form. To view all the properties available in the system, click the *Expand search to include all properties* checkbox. If no property is entered in the intake, all primary and standalone permits are listed. Permits in Void, Denied, or Withdrawn status are not listed.

**Tip:** At the time of creating the intake form using the Form Designer, it is recommended that you add the **Property** field group to the Intake design form before including the **Subapplication** field group. For details, see *Using the Intake Form Designer*.

Administrators can use the Contextual Help page to change the descriptive text for the options in the Primary and Subapplication section. You add an agency-defined type of contextual help and enter your own help content. To access the Contextual Help page, navigate to **Help Management > Contextual Help**.

See *Linking Primary and Subapplications* and *Setting Up Contextual Help*.

## Related Transactions

The Related Transaction section allows you to link your current application to other existing applications in the system. Click the **Link** button to open the Link Transaction page. Select all the desired applications using the check boxes and then click the **Add Selected As** button to view the options of link type:

- Primary
- Subapplication
- Linked

Select one of the above options to establish a link between the current application and the selected transaction applications. If the current application is:

- **Primary:** You can select existing applications and link them as Subapplications.
- **Subapplication:** You can only select an application that is not a subapplication and link it as Primary. Once a permit is marked as a subapplication, the system disables the option to link the application as Primary.

Existing applications that are in terminal statuses such as Completed, Canceled, Withdrawn, or Denied are NOT available for selection.

**Note:** By default, the page shows only the applications that have the property address same as what you've entered in your current application. You can remove the filter to see all available transactions that are open for linking. Also note that the linking options available are based on your application type—Primary or Subapplication.

For more details, see *Working with Related Transactions*.

## Industry Classification

The Industry Classification section enables applicants to select industry standard classifications for a business when applying for a license.

Search and select one or more NAICS codes that match the various business activities for the selected location. The fee component is updated accordingly in the Fee Summary section.

Agency staff can also edit the NAICS codes on the Application Details page in the business license details. For more details, see [Viewing the Business License](#) and [Working with Fees and Payments](#).

## 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.

Also depending on agency setup, you may be prevented from uploading protected PDF files.

## 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

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 list of contacts for the application displays the contact type, description, and level of application access.

The contact types and levels of access that a contact can have are different for business license applications and permit and planning applications. For more details about contact types and their access to a business license application, permit, or planning application, see [Setting Up Contact Types](#).

There are similarities and differences between contacts for permits and planning applications and business license applications:

### All applications:

- Select an existing contact from a list, or enter information for a new contact on the Contact Details page.
- 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 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 if you are the applicant, primary contact, or business owner for business license application.
- The page where you enter or edit contact details includes explanatory text to ensure that you are aware of the type of access the selected contact type confers. Applicants and agency staff can elect to provide more access to the contact.
- All application contacts must have a contact type that describes the role of the person relative to the specific application. Different contact types have different levels of application access, as set up by your agency. When you add a contact to an application, you select a contact type, but you can upgrade the level of application access.

- When you add a new contact, select the **Add this contact to the applicant's account** check box to replicate them to the applicant's list of profile contacts. Applicants and system administrators only have the option to update contact information and save updates on the user's profile.
- 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.
- The applicant can never be made inactive on an application whereas other contacts can.
- Contact information for the contractor entered in the Contractor section in the application appears in both the Contractor and Contacts sections.

#### Permits and planning applications:

- When you add a new contact, you can see the level of access each contact type confers—**Full** or **None**. You must select an agency-defined contact type but you can give the contact full access, which is similar to applicant-level access.

Applicants and contacts with full access can also make a contact inactive. Inactive contacts can't access the application.

- 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.

#### Business license applications:

- Agency staff members or applicants can add and update a contact type to primary contact. They can also provide the following access to a contact: **Full**, **None**, or **View, pay, and print**. If the contact type is configured to allow full access, and the contact email matches the account email for a registered user, then that registered user can access the application after it's been submitted. Contacts with full access can also view the associated business entity and license records. If a contact type is allowed **View, Pay, Print** access, then they can only view the business license application, pay fees, and print the license certificate. The **View, Pay, Print** option is available only for business license application contacts.
- Any owners or corporate officers added to a business license application are automatically added as contacts in the Contacts section. Business owners can't be made inactive contacts in the Contacts section.
- Agency staff or applicants can choose to hide the business information from public view. Turn on the **Hide business from public view** switch in the Business Details section of the application. This ensures that the business-related information will not be displayed in the global search results as well as on the maps.

## 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.

# Entering Contractor Information on Permit and Planning Applications

The **Contractor** page in an intake form enables applicants to provide information about 1 or more licensed contractors who are performing the work for a permit or planning application.

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 at least one contact person from a list of verified contractors associated with the license. Once the applicant selects **Done** for the license information, the selected contacts also appear in the **Contacts** section of the application. Contractor contact access to an application can be updated in the **Contacts** section.

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.

**Note:** The workers' compensation insurance policies must be unique by insurance type and policy number, and bonds must be unique by policy number when added for a license. Classification values must also be unique.

**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](#).

## 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

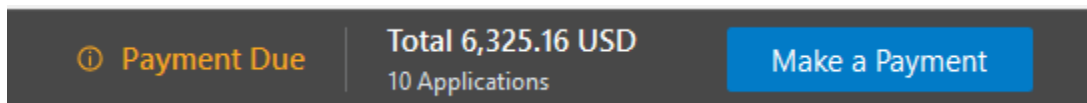
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

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.

## Making Payments as Registered Users

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
<b>Deposit Accounts</b>	Turn on this switch to select a deposit account from the Account drop-down list, to make the payment.  <b>Note:</b> When a deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.
<b>Select All/Deselect All</b>	Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied.  The <b>Total Selected</b> field above the grid shows the number of applications selected and the total amount due for the selected applications.
<b>Application</b>	Each item on the page is identified by the application number. Click the application number to open the overview page with the application summary and access to details.  The application type, such as <i>Residential Addition</i> or <i>Commercial Renovation</i> , and the Doing Business As (DBA) name (if the business has one), are listed 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 <a href="#">Applying Conditions to Applications</a> .
<b>Property</b>	View the location of the property for the application.
<b>Description</b>	View a description of the application.

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

## Making Payments as Agency Staff

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** 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. If the selected customer has a deposit account, the agency user can turn on the **Deposit Account** switch to select an account from the Account drop-down list and make the payment.

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.

**Note:** If there is a credit balance available, agency staff has the option to use the **Apply Credit** switch to apply a credit for a payment on-account towards a payment of a fee amount. Before applying the credit, agency staff can click the **More Information** link to get the specifics about the payment on-account balance. If agency staff chooses not to apply the credit for the payment on-account balance, they can issue a refund for it.

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
<b>Deposit Account</b>	<p>Turn on this switch to select a customer's deposit account from the Account drop-down list, to make the payment.</p> <p><b>Note:</b> When a customer's deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.</p>
<b>Account</b>	Click the drop-down button to display a list of the customer's deposit accounts.
<b>Customer Name</b>	Displays the name of the customer currently chosen to make the payments for.
<b>Change Customer</b> button	Click to choose a different customer.
<b>Select All/Deselect All</b>	<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 <b>Total Selected</b> field above the grid shows the number of applications selected and the total amount due for the selected applications.</p>
<b>Application</b>	<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 <a href="#">Applying Conditions to Applications</a>.</p>
<b>Property</b>	View the location of the property for the application.
<b>Description</b>	View a description of the application.
<b>Primary Contact</b>	<p>View the primary contact for the application.</p> <p>For information on how to add contacts and change the primary contact, see <a href="#">Working with Application Contacts</a>.</p>
<b>Amount</b>	View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.
<b>Cancel</b>	Click to cancel and go back to the home page.
<b>Continue</b>	Click to access the Deposit Account Payment page to continue with the payment.



Page Element	Description



# 4 Using the Agency Springboard and Worklists

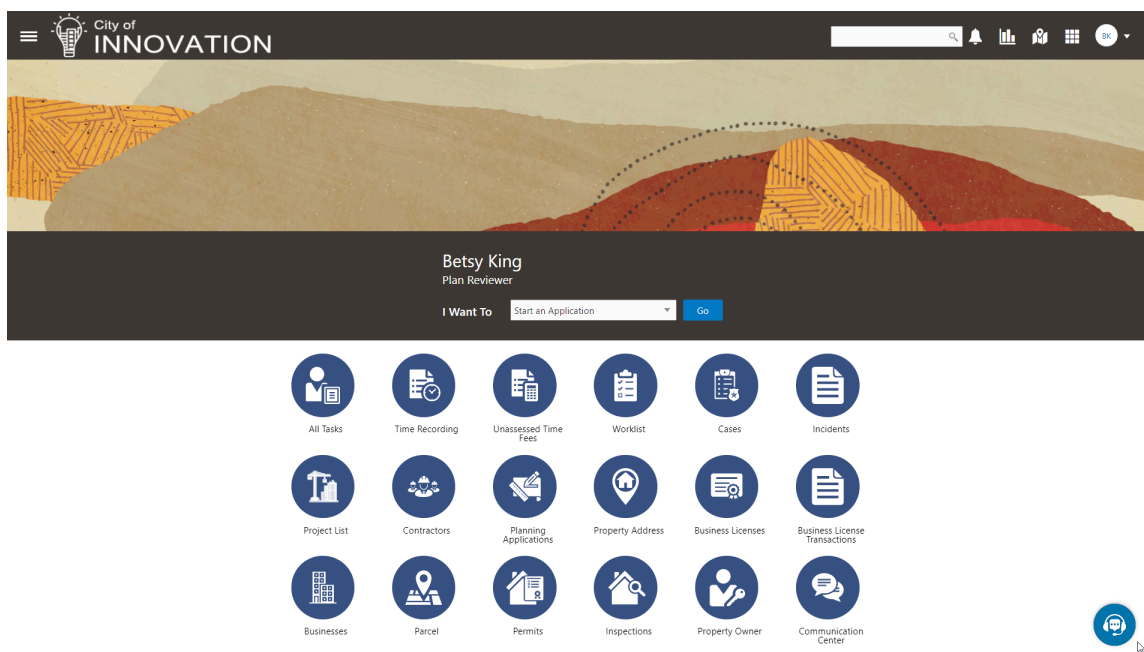
## Using the Agency Springboard

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

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

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

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









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



## Global Header

The global header appears:

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

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

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

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

## Alerts

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

## Quick Actions (I Want To)

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

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

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

## Tiles

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

## Using the Planner Worklist

The planner worklist provides a central location for performing planning-related activities. Separate tabs list unassigned applications, plan reviews, inspections, incoming tasks, calendar, and applications and activities that are assigned to the current user. Planning department staff can also view tabs which list all applications and activities for the agency.

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

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

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

The planner worklist has the following tabs:

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

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

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



Tab	Displays	Available Actions	Additional Information
All Applications	<p>All planning applications for the agency.</p> <p>Comments and attachments pertaining to all applications.</p> <p>This tab includes a map view for displaying application locations.</p>	<ul style="list-style-type: none"> <li>• Send Message <i>See Working with Communications.</i></li> <li>• Reassign Planner <i>See Working with Planners.</i></li> <li>• Copy Application <i>See Copying an Application.</i></li> <li>• Withdraw Application <i>See Withdrawing an Application.</i></li> <li>• Update Description</li> </ul>	<p>This tab is visible to all users who have the <i>Planner</i> Job Function (ORA_PLANNER).</p> <p>Review or add comments and attachments to all applications. See <i>Working with Attachments</i> and <i>Working with Comments</i>.</p> <p>Agency staff with the role ORA_PSC_PNZ_MANAGEMENT_ELEVATED_ACCESS can update the associated objects of the planning application that are assigned to other planners.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <i>Applying Conditions to Applications</i>.</p>
All Activities	All planning activities for the agency.	<p>View or Update</p> <p><i>See Working with Planning Application Activities</i></p>	<p>This tab is visible to all users who have the <i>Planner</i> Job Function (ORA_PLANNER).</p> <p>Agency staff with the role ORA_PSC_PNZ_MANAGEMENT_ELEVATED_ACCESS can update the associated objects of the planning activities that are assigned to other planners.</p> <p>This tab has subtabs that further filter the activities by due date: <i>Overdue</i>, <i>Due Today</i>, <i>Due This Week</i>, and <i>Due Next Week</i>.</p> <p>Subtab action menus have the same actions as the main tab. To return from a subtab to the main tab, click the Back icon next to the Search icon.</p>

**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 planner worklist, each agency staff member can now personalize expanded grids to display information in a manner that suits their own requirement. See *Personalizing Grid Displays*.

## Viewing Additional Application Information

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

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

## 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.

### Permit application

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

### Planning application

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
<b>Fees/Conditions</b>	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.

Page Element	Description
<b>Task Name</b>	Identifies the nature of the task to be performed. Values include <i>Application Acceptance</i> , <i>Permit Completion</i> , and so on.
<b>Task ID</b>	The unique identifier of the task.
<b>Application ID</b>	The application ID for the individual submitted transaction being worked, such as the permit ID.
<b>Application Type</b>	The type of application being worked, such as <i>Solar Permit</i> , <i>Building Permit</i> , and so on.
<b>Status</b>	Displays the task status. Different types of tasks can have different statuses. For example, permit tasks may have a status of <i>Assigned</i> , while inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks.
<b>Assigned To</b>	Displays to whom the task is assigned.
<b>Assigned Date</b>	Displays the date on which the task was assigned.
<b>Actions</b>	Click to display the actions you can take for that task, such as <i>Claim</i> , <i>Reassign</i> , and so on.
<b>&gt;</b>	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 Applications for Planning and Zoning

## Security Details for Managing Applications for Planning and Zoning

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

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

## Managing Transactions

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

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

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

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

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

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

## Registered User View

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

Registered users who have applied for a permit or submitted a planning application for themselves or as a representative for someone else, see only the applications that they are associated with on the Applications page. A logged in user can access all the applications for which the user is:

- an applicant,
- a contact with application access, or
- the primary contact.

### Using the Applications Page

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

For information about adding and removing contact users, see *Working with Application Contacts*.

**Note:** If the applicant or the agency staff removes a contact from an application, then the application is no longer listed on the user's Applications page. Applications are not listed for those associated contacts who are neither the primary contact nor have application access.

The payments banner at the top of the page displays information if there is a payment due for the submitted permit or planning applications. The payment due details include the total amount payable, the number of applications the user is

associated with, and a **Make a Payment** button to pay for all or selected applications. Applicants and contacts can pay for all or selected applications. For more information, see *Making Payments*.

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

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

## Using the Transactions Page

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

Page Element	Description
<b>Apply</b>	Click to open the Apply page and select a type of application you want to apply from business license, permit, or planning applications.  For more information, see <i>Choosing an Application Type</i> and <i>Completing an Application</i> .
<b>Download</b>	Click the download button to export the list to a .csv file.
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; display: inline-block;">Last Updated ▼</div>  <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px; display: inline-block;">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 <b>Show All Data</b> , 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 <b>Show All Data</b> is selected.  <b>Last Updated</b> and <b>Last 30 Days</b> 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.
<b>Show All Statuses</b>	Use this switch to filter the list based on transaction status: <ul style="list-style-type: none"> <li>o If the switch is off, the list includes only active transactions.  This is the default setting if any active transactions exist.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ If the switch is on, the list includes transactions in all statuses, including active, inactive, canceled and withdrawn applications.</li> </ul> <p>This is the default setting if there aren't any active transactions.</p>
<b>Search</b>	<p>Search by alphanumeric characters on the fields for permits or planning applications in the list. The permits or planning applications that meet the search criteria are displayed on the page.</p> <p>When you search on dates, use this format: MM/DD/YYYY.</p> <p>Search results display only the primary address for the permit or planning application. You can confirm the correct transaction by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.</p>
<b>Filter By</b>	<p>Apply filters to display permits or planning applications that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</p> <p><b>CAUTION:</b> When defining filters, if you select <b>Creation Date</b> or <b>Submission Date</b>, then ensure that the <b>Show All Records</b> option is selected from the Quick Filter described above.</p> <p>As a planner, you can also find the planning applications assigned to you or unassigned applications by selecting predefined filters, <i>My Assigned Applications</i> or <i>Unassigned Applications</i>, respectively.</p>
<b>Sort By</b>	<p>In the <b>List View</b>, you can use the <b>Sort By</b> button to arrange the permits or planning applications.</p> <p>Here are some of the sorting options:</p> <ul style="list-style-type: none"> <li>○ <i>Application</i></li> <li>○ <i>Type</i></li> <li>○ <i>Status</i></li> <li>○ <i>Creation Date</i></li> <li>○ <i>Submission Date</i></li> <li>○ <i>Description</i></li> <li>○ <i>Applicant</i></li> <li>○ <i>Created By</i></li> <li>○ <i>Submitted By</i></li> <li>○ <i>Total Fees</i></li> <li>○ <i>Total Due</i></li> <li>○ <i>Expiration Date</i></li> </ul>
<b>List View</b>	View the inventory of permits or planning applications in a list.




Page Element	Description
<b>Grid View</b>	In the <b>Grid View</b> , you can sort by selecting the column header. Some columns will have multiple sort fields. You can reset the sort order, by refreshing the page.
<b>Map View</b>	<p>View the inventory of permits or planning applications on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See <i>Viewing Map Markers</i>.</p>



## Managing Application Activity

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

Here are some of the information you can look at:





Page Element	Description
<b>Application</b>	<p>View the application ID, application type, and status.</p> <p>Review the application status, for example, <i>Payment Pending, Submitted, Pending, Permit Issued</i>, and so on.</p>
<b>Relationship Details</b>	View detail if the permit application is primary or subapplication, along with a link to any available linked applications.



Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Primary</i>: Click the <b>View Subapplications</b> link to open the Linked Permits modal page, which lists the selected primary application at the top, followed by all the linked applications.</li> </ul> <p>The Linked Permits modal page allows you to:</p> <ul style="list-style-type: none"> <li>- Apply for up to 5 subapplications for the selected permit,</li> <li>- Establish link with an existing transaction application, or</li> <li>- Remove link from a linked application.</li> </ul> <p>See the <b>Applying for Subapplications</b> section.</p> <ul style="list-style-type: none"> <li>○ <i>Subapplication</i>: Click the <b>Primary: &lt;application ID&gt;</b> link to access the primary permit application that is linked to the selected subapplication. The system displays <b>Primary: Not defined</b> until the subapplication is linked to a primary permit.</li> </ul>
<b>Property</b>	<p>View parcel information.</p> <p>Review the parcel information, including the street address, if available.</p> <p>The transaction list displays only the primary address. You can review all of the addresses associated with the application in the details, which you access by clicking the application row.</p> <p>You can sort the Property column based on property details, such as street, address, and city. You can also sort the Additional Information column on the basis of dates, such as creation, submission and expiration, as well as names of applicant, created by and submitted by users.</p>
<b>Description</b>	<p>View the description of the application entered on the application form or on the Overview page in the permit or planning application details.</p>
<b>Additional Information</b>	<p>Review the name of the person who created or submitted the application, and the corresponding date. For example, the application was <i>Created by John Doe on 12/20/2018</i>.</p> <p>Review the permit or planning applicant's name. This may not be the same as the person who created the request. For example, <i>Applicant: John Doe</i>.</p> <p>View expiration notifications. For example, <i>Expires in 1 day or Expired on 10/01/2019</i>.</p>
<b>Planner</b>	<p>View the planner assigned to a planning application. This field appears only on the <b>Planning Applications</b> list.</p>
<b>Fees</b>	<p>Review the total fees that are applicable to the permit or planning application and a fee balance if the total has not been paid.</p>
	<p>Select the <b>Pay</b> button in the <b>Actions</b> column to submit a payment on behalf of the applicant.</p> <p>The <b>Pay</b> button takes agency staff to the Pay Fees page where you can initiate a full or partial payment for the application fees. The <b>Pay</b> button on the Applications page takes applicants and contacts with application access directly to the Checkout page. Only agency staff can initiate partial payments.</p>

Page Element	Description
	<p>If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p>For more information about paying fees, see the <a href="#">Payment Flow Overview</a>.</p>
	<p>Select the <b>Resubmit</b> button to resubmit an application.</p> <p>The application status is <i>Pending Submit</i> because there may be a problem initiating workflow. Click the <b>Resubmit</b> button to retry initiating workflow.</p> <p>Resubmitting the application does not affect the fee calculations.</p>
	<p>Select the <b>Actions</b> button for options:</p> <ul style="list-style-type: none"> <li>○ <i>Apply for Subapplication</i>: Click to create up to 5 subapplications. You can copy over the details from the primary permit application to each of the new subapplications. For details, see the section <b>Applying for Subapplications</b> in the topic <a href="#">Working with Linked Permits</a>.</li> <li>○ <i>Copy Application</i>: Click to copy the details of the selected application to a new application.</li> <li>○ <i>Cancel Application</i>: Click to cancel an application with a pending or payment pending status. The button appears only when the application has a pending status.</li> </ul> <p><b>Note:</b> This option is available only for applicants and agency staff.</p>

## Identifying Transactions Page Icons

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

Icon	Description
	Indicates that there was an error during the submittal process and the application status is pending submittal. There may be a problem initiating workflow. Click the <b>Resubmit</b> button to retry initiating workflow.
	Indicates that the permit or planning application is part of one or more projects. For more information, see <a href="#">Viewing Project Summaries</a> .
	Indicates the planning application is classified as a preapplication.
 (Hold)	Indicates that a condition has been placed on the application.  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, source, source reference, display message, and when the condition was applied. Click a condition row to open the application's Conditions detail page in a new window.

Icon	Description
 (Lock)	If the condition was automatically applied, a condition source reference ID is displayed. A reference link is available only to agency staff. Click the link to access the Condition Details page from the source application that applied the condition.
 (Notice)	<p>When an agency staff applies a condition to an address, contractor license, parcel, or person by enabling the <b>Apply Condition to Transactions</b> option, then the condition is automatically applied to all transactions belonging to the source application. For details, see <a href="#">Setting Up Conditions</a>.</p> <p>A <b>Lock</b> condition enforces all rules to restrict permit and planning application activity associated with a license. A <b>Hold</b> condition indicates that one or more rules apply. And the <b>Notice</b> condition shows there's an issue but no restrictions.</p> <p>The agency sets up conditions. For more information about conditions, see <a href="#">Applying Conditions to Applications</a>.</p>

## Starting an Application

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

- In the **I Want To** quick actions section, select *Start an Application*.
- Select the **Business License Transactions, Permits, or Planning Applications** tile. Click **Apply** on the Transactions page.

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

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

## Updating an Application

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

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

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

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

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

## Canceling a Pending Application

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

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

## Entering Application Fee Payments

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

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

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

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

## Applying for Subapplications

Applicants and agency staff can create new subapplications from the primary permit application that they are working with. Use the **Apply for Subapplication** action button available on the Transactions list page, permit's Overview page, or on the Linked Permits page.

For more information, see [Working with Linked Permits](#).

## Copying an Application

Applicants and agency staff can copy an existing application into up to 5 new applications using the **Copy Application** action button on the Transactions page.

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

## Accessing Application Details

You can access application details from the Transactions page.

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

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

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

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


## Copying an Application

Agency staff and applicants can copy existing permit, planning applications, or business 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, preapplication, 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
<b>Copy From</b>	Displays the application ID and the application type of the source application.
	<p>Use the increment and decrement buttons to increase or decrease the number of new copies.</p> <p>By default, this is set to five copies. Agency staff with the appropriate access can change the maximum number of copies that can be created at a time. For details, see <a href="#">Setting Up Agencies</a>.</p>

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

Page Element	Description
<b>Expand All, Collapse All</b>	When multiple copies are being created, use these links to expand or collapse the applications in the Copy To list.
<b>Applicant</b>	<p>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.</p> <p><b>Note:</b> Registered public users can't change the applicant.</p>
<b>Application Type</b> (enterable)	Select the application type for the new application. The application type from the source application is the default value.
<b>Description</b>	Review and optionally modify the description of the source application to create the description for the new application.
<b>Link to &lt;Source Application ID&gt;</b>	Turn on this switch to link the new application to its source application.

Page Element	Description
	Every application in the Copy To list has a separate delete icon. Click this icon to remove the application from the list. Whenever an application is deleted from the Copy To list, the sequence is refreshed and the new count gets reflected in the Copies field.

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

Page Element	Description
<b>Property</b>	<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>
<b>Business Information</b>	<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 <b>Business Location</b> check box if you want to add a new location to your application.</p>
<b>Industry Classification</b>	<p>Select this check box to copy any industry standard classification information from the source application to the new business license application.</p> <p>The source application can contain one or more NAICS codes added by the applicant during intake and by the agency staff on the Application Details page in the business license details.</p> <p>This option appears only if the application type for the source and new application is business license.</p> <p>See <a href="#">Completing an Application</a> and <a href="#">Viewing Business Application Information</a>.</p>

7. Click Save. A summary page appears that lists all the applications which were copied, and which couldn't be copied. All applications which failed to copy has the Copy Application links against them. Click the link to open a new application intake form and complete each application one at a time.

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.



## Canceling an Application



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

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

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

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

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

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

## Security Details for Canceling an Application

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

### Planning application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Cancel Planning Application	Allows an agency user to cancel a pending planning application.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Registered Public User PSC Principal Planner 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](#).

## Canceling Pending Applications

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

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

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

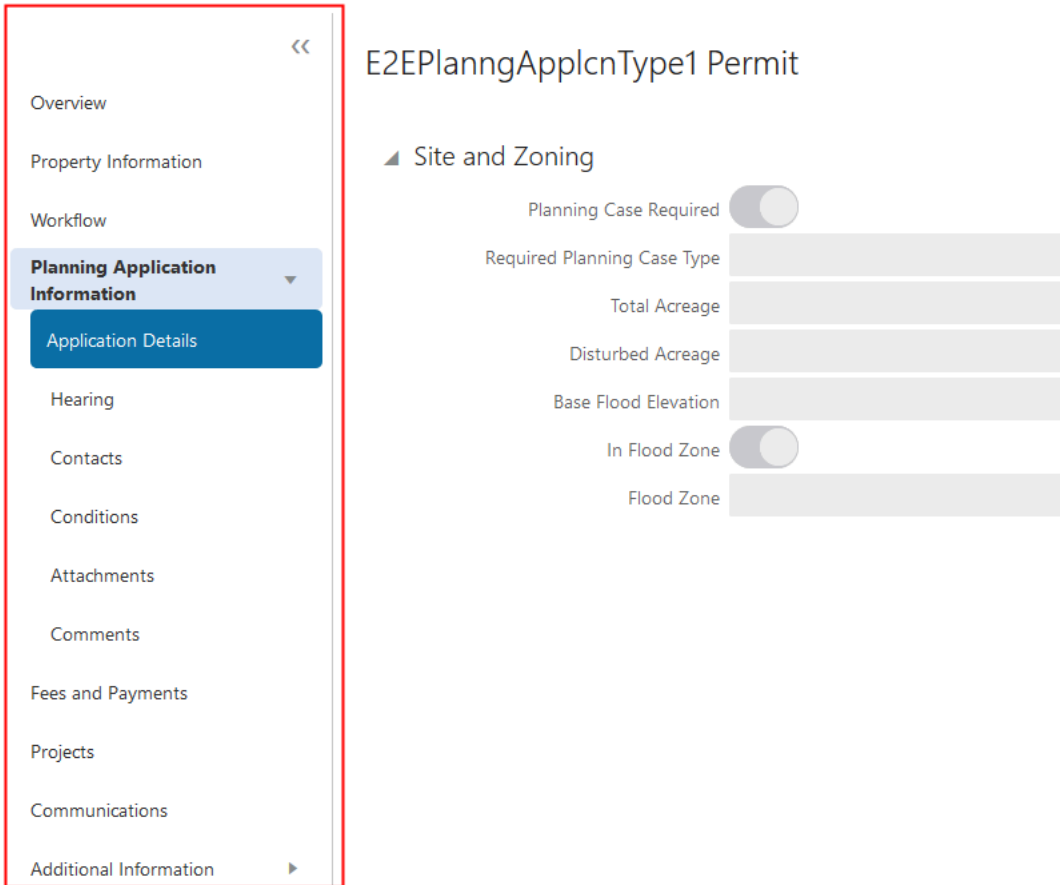
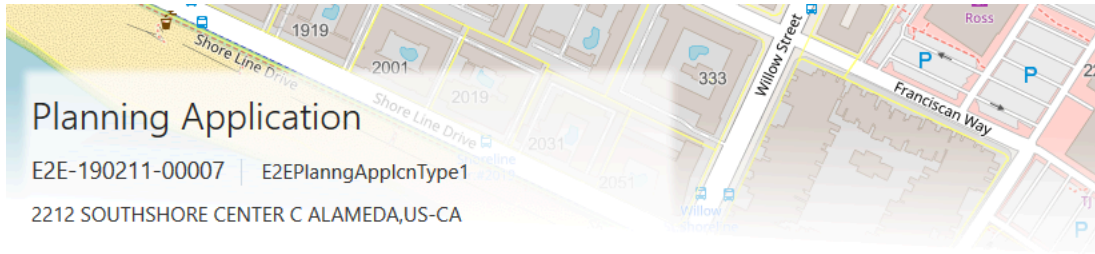
**Note:** When you cancel an application, the system also cancels any plan reviews and inspections that are associated with the application.

## Navigating to Planning Application Details

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

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

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



To access the planning application detail pages:

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

The information for a planning application comprises these pages:

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

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

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

## Viewing the Planning Application Detail Overview

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

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

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

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

### Using the Overview Page

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

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

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

Page Element	Description
Status	Review the application status.

Page Element	Description
<b>Completed Date</b>	Review the date the application was completed.
<b>Planner</b>	<p>Review the name of the planner assigned to the planning application or preapplication.</p> <p>After a planner is assigned, registered users view one of the following details:</p> <ul style="list-style-type: none"> <li>○ Planner’s name and their email ID</li> <li>○ No detail (the <i>Planner</i> field is not displayed)</li> <li>○ Planner’s name only</li> <li>○ Planner’s name and a general email ID of the agency</li> </ul> <p>Agency administrators configure the above display options on the <i>Agency Information – Planning and Zoning Options page</i>. See <a href="#">Setting Up Agency-Level Options for Planning Applications</a>.</p> <p>Only agency staff can view the planner’s name and assign or reassign a planner to the application by clicking the <b>Assign</b> or <b>Reassign</b> link.</p> <p>Click the <b>Planner Assignment History</b> icon next to the <b>Planner</b> field to view a history of planner assignments.</p> <p>When you assign or reassign a planner, the workflow task – <b>Assign Planner</b> will be updated to <i>Planner Assigned</i> status. For details about workflow tasks, see <a href="#">Using Workflow</a>.</p> <p>You can configure the Business Rules Framework to trigger the advancement of the workflow task and to generate a communication to the applicant and the assigned planner. For example, once a planner is assigned and the Activity Tracking is updated to complete, the Business Rules Framework will automatically advance the workflow to the next task.</p> <p>For more details, see <a href="#">Business Rules Framework Overview</a> and <a href="#">Setting Up Business Rules</a>.</p>
<b>Description</b>	Enter a description of the application by clicking the <b>Add</b> link in the <b>Description</b> field. Only agency staff can add a description.
<b>Submitted By</b>	Review the name of the person who submitted the application and the date when it was submitted.
<b>Received Date</b>	<p>Review the date when the planning application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page.</p> <p>For applicants submitting their application online, the received date field isn’t available in the intake form or on the Overview page.</p>

Page Element	Description
	If the planning application is set up for activity tracking, the received date is used as the base date for calculating the activity due date after the application is submitted. The due date is recalculated when you make changes to the received date.
<b>Expiration Date</b>	<p>Review the expiration date of the application.</p> <p>If the <b>Extend</b> link is available next to the <b>Expiration Date</b> field, agency staff can enter a new expiration date that allows more time before the application expires.</p> <p>Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the planning application type, you might see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see <a href="#">Expiration Overview</a> and <a href="#">Working with Application Expiration</a>.</p>
<b>Withdraw Application</b>	<p>Click the <b>Withdraw Application</b> button to change the application to a withdrawn status. When you withdraw an application, any scheduled preapplication meetings or public hearings are canceled.</p> <p>For more information about withdrawing an application, see <a href="#">Withdrawing an Application</a>.</p>

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

Page Element	Description
<b>Applicant</b>	<p>View the applicant's name and contact information.</p> <p>Click the <b>View Details</b> link to open the Contacts page. For more information about contacts, see <a href="#">Working with Application Contacts</a>.</p>
<b>Workflow</b>	<p>View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status.</p> <p>Click the <b>View Details</b> link to open the Workflow page. For more information about workflow, see <a href="#">Using Workflow</a>.</p>
<b>Fees and Payments</b>	<p>View the total fees paid, amount due, and the date and amount of the last payment.</p> <p>Click the <b>View Details</b> link to open the Fees and Payments page. See <a href="#">Working with Fees and Payments</a>.</p>
<b>Projects</b>	View the projects to which this permit or planning application belongs.

Page Element	Description
	<p>Click the <b>View Details</b> link to open the Projects page, where you can see the list of projects in more detail. Click the <b>Project ID</b> link to find out more about the project, which may contain other permits or planning applications. See <a href="#">Viewing Project Summaries</a>.</p> <p>The Projects section is available only when the permit is associated with a project.</p>

## Withdrawing an Application

Only agency staff can withdraw applications that have been submitted for processing and are in progress. Activities associated with the application are also canceled or withdrawn.

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

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

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

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

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

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

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

## Security Details for Withdrawing an Application

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Withdraw Planning Application	Allows an agency user to withdraw a planning application after submission.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner



Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Principal Planner 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](#).

## Withdrawing In-Progress Applications

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

To withdraw an application:

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

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

## Reopening a Permit or Planning Application

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

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

To reopen a permit or planning application:

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

5. On the Reopen Application page, use the following fields to update the permit or application information:

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

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

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

## Working with Planners

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

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

## Assign Planner

PreApp-2019-00008

PreAppMeeting

The assigned planner is Susan Anderson.

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

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

## Security Details for Working with Planners

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assign Planner	Assign a planner to planning application and preapplication.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner 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](#).

## Assigning a Planner

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

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


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

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

## Viewing Planner Assignment History

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

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

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

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

## Working with Property Information

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

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

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

## Security Details for Working with Property Information

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

### Permit application

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

### Planning application

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

## Viewing Property Information

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

You can find information about permit and planning application property information here. For information about business license property information, see [Working with Business Location Information](#).

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

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

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

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

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



The GIS attributes are retrieved from map layer content and saved in this grid in the application details after you select a property on the application. For each additional property that you select, the respective GIS attributes and values intersecting that property are also collected.

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

The captured attributes may only be visible to agency staff, depending on the application design.

This table lists the information that agency staff can see in the **Additional Property Reference** grid. Only the **Attribute**, **Value**, and **Location Reference** fields can be made visible to registered public users.

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

Page Element	Description
<b>Value</b>	Displays the value of the attribute from the map layer. For example, the value for the <i>Risk Level</i> attribute label can be <i>Low</i> .  <b>Note:</b> Agency staff can manually update the <b>Value</b> field. Click <b>Edit</b> for the GIS information row.
<b>Location Type</b>	Displays whether this property is a parcel, address, or object.
<b>Location Reference</b>	Displays the reference number for the property.
	Click the button to recover the GIS attributes and their values from the map service.  <b>CAUTION:</b> Clicking <b>Refresh</b> overwrites any manually updated values with the map service values.
	Click to update the attribute value on the Update Attribute Value modal page. Agency staff only can update the <b>Value</b> field.

## Adding New Properties

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

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

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

## Adding Existing Properties

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.

2. On the Transactions page, click the row for the permit or planning application you are working with.
3. Click Property Information in the left panel.
4. To add a single property:
  - a. Use the **Search Property** field to find the property that you want to add.

You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.
  - b. Click the property to add it to transaction. The selection appears in the grid on the Property Information page.
5. To add multiple properties:
  - a. Click **Select from List** to access the Search Property modal page.
  - b. Search for the properties that you want to add and select the check box next to them.

You can search by parcel address. Properties with a parcel status of *Retired* do not appear in the search results.

You can view all of the selected properties in the Selections tab.
  - c. Click **Done**. All of the properties that you selected appear in the grid on the Property Information page.

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

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

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

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

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

## Modifying Property Details

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

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



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

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

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

## Deleting a Property

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

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

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

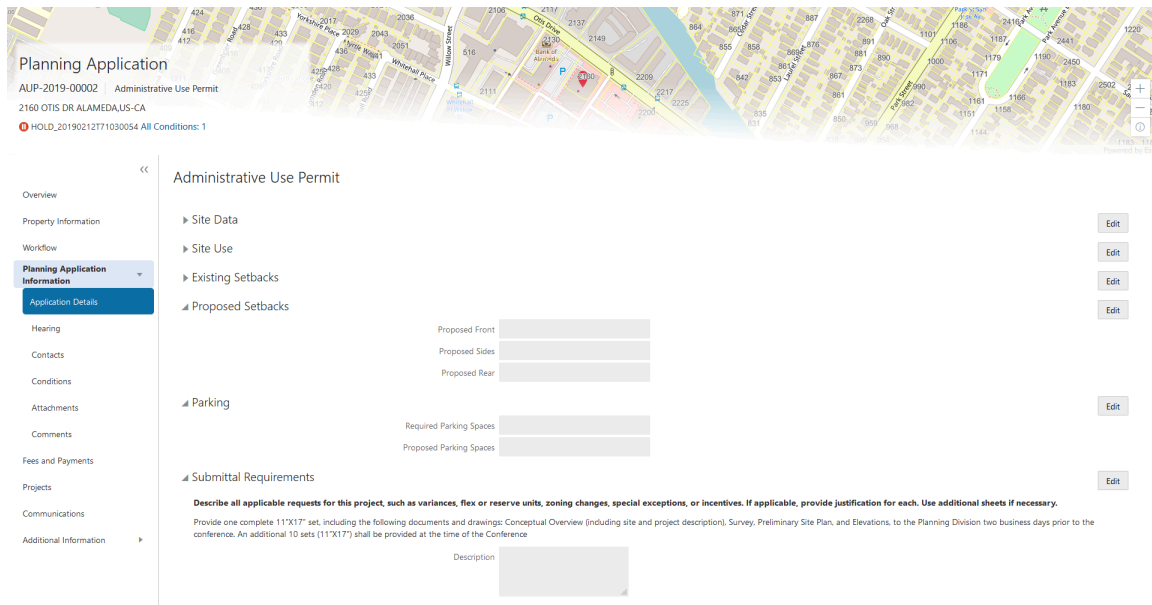
**Note:** Deleting a property automatically deletes any associated property conditions that are applied to the permit or planning application that you are working with. You can't delete a property if that's the only property added to the application.

## Viewing Application Information

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

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

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



## Updating Application Details

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

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

## Using Workflow

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

### Permit application

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

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

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

### Planning application

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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

## Code Enforcement

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

For more information on creating roles for 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.

For details on managing workflow tasks in code enforcement, see *Using Workflow in Code Enforcement*.

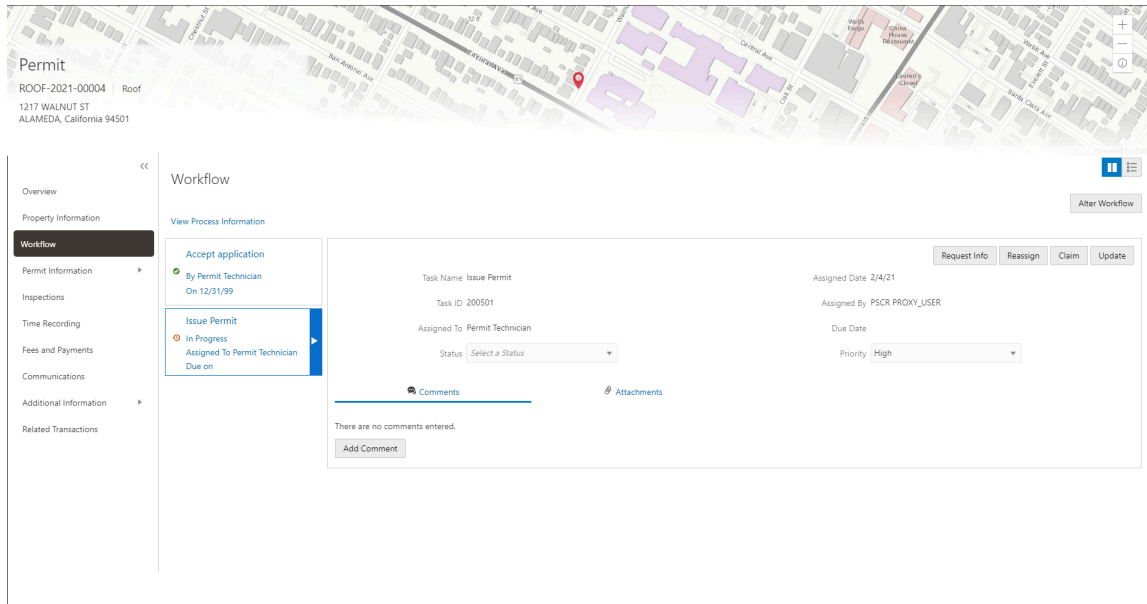
## Using the Two-Panel View in Workflow for an Application

To manage workflow tasks in a two-panel view:

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

**Note:** By default, the Workflow page displays the two-panel view for agency users for Permits, Planning and Zoning, and Business Licenses.

4. Click the **Show Two-Panel View** button to display the two-panel view.  
This example illustrates the Permits Workflow page in a two-panel view.



Panel	Description
Task summary cards on the left.	<p>The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information:</p> <ul style="list-style-type: none"> <li>○ Task name</li> <li>○ Task status</li> </ul> <p>Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always <i>In Progress</i>. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks.</p> <ul style="list-style-type: none"> <li>○ Assignee</li> </ul>

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"> <li>○ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.</li> </ul>
Task details on the right.	<p>The right panel displays more details for the task that is selected in the left panel.</p> <p>If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments.</p> <p>Completed tasks are not updatable, but you can add comments to them.</p>

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

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

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

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



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

Page Element	Description
<b>Reassign</b>	<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 <a href="#">Using the Code Officer Worklist</a> and <a href="#">Using the Code Technician Worklist</a>.</p> <p>For details related to permits, planning and zoning, and business license application tasks, see <a href="#">Managing Tasks</a>.</p>
<b>Claim</b>	<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>
<b>Release</b>	<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
<b>Status</b>	<p>Select a status that represents the final outcome of the task.</p> <p>The task statuses depend on the workflow setup. For example, the available statuses for a task that requires a simple approval might be <i>Approve</i> and <i>Reject</i>. The workflow status of each task is defined by the agency using OIC.</p> <p>Other tasks might require different statuses. The sample workflow that Oracle provides includes these statuses for the task where you review an application: <i>Accepted – Plan Review Not Required</i>, <i>Accepted – Plan Review Required</i>, <i>Planner Assigned</i>, <i>Specialist Assigned</i>, <i>More Info Needed</i>, and <i>Reject</i>.</p>

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

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

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

- 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.

## Adding Comments to a Workflow Task

Comments are a useful mechanism for adding information to a workflow task. You can control whether the comment is visible to public users who view their application workflow. The default setting is for comments to be visible, so you must manually hide comments that you do not want the public user to see.

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

To add a comment to a task:

1. Access the workflow task.
2. Click **Add Comment**.
3. To write a new comment from scratch, enter and format your comment in the rich text field on the page.
4. To create a new comment based on one or more existing comments:
  - a. Click **Select Comments**.
  - b. On the Select Comments page, click **Favorite**, **Standard**, or **Recent** to see the corresponding list of comments. Favorite, standard, and recent comments are described in the topic [Working with Comments](#).
  - c. Locate and select the comments you want to copy, using the search and filter options as needed.
  - d. Click **Insert** to copy the text of the selected comments into the field for the new comment.
  - e. If necessary, modify the copied text.
5. If you want to hide the comment from public users, click the **Hide from Public** icon to toggle the visibility setting.

When the icon displays an open lock, the comment is visible to the public. This is the default setting for new comments.

When the icon displays a closed padlock, the comment is hidden from the public.

6. Click **Save** to save the comment and return to the Workflow page.

## Modifying a Comment in a Workflow Task

To modify a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Modify the text of the comment as needed.

if you use the **Select Comment** option to add text from an exiting comment, the new text is added after any existing text.

4. To modify the comment visibility, click the **Hide From Public** icon.

Clicking the icon toggles the setting. When the icon displays an open lock, the comment is visible to the public. When the icon displays a closed padlock, the comment is hidden from the public.

5. Click **Save** to save changes and return to the Workflow page.

## Deleting a Comment from a Workflow Task

To delete a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Click the **Delete** icon.

The comment is deleted, the window closes, and you return to the Workflow page.

## Managing Attachments for a Workflow Task

You can upload files to attach them to specific workflow tasks. File that you associate with a workflow task are visible only on the detail page for that task. That is, workflow attachments are not visible on the general Attachments page for an application.

To manage attachments for a workflow task:

1. Access the workflow task.
2. Click the **Attachments** link to display attachments information.

The **Attachments** link and **Comments** link toggle the display between task comments and task attachments. In Attachments view, a grid displays the **File Name**, a **Description**, and the **File Size** for each attachments.

3. To add a new attachment:
  - a. Click **Add**.
  - b. Select a file using your browser's file selection window.
  - c. On the Add Attachments page, verify the **File Name** and optionally enter a **Description**.
  - d. Click **Upload**.

When the upload is complete, the new attachment appears in the workflow task details.

4. To view or modify attachment information:
  - a. Click the **Actions** icon for the existing attachment.
  - b. Select **View Details**.

- c. On the Attachment page, review the **File Name**, **File Size**, and the **Last Updated By** and **Uploaded By** user names.
- d. Optionally update the **Description**.
- e. Click **Save** or **Cancel** to return to the Attachments page.
5. To download a file, click the **Actions** icon and select **Download**.
6. To delete a file, click the **Actions** icon and select **Delete**.

You are prompted to confirm the deletion.

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

## Requesting Additional Information

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

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

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

**Note:** The agency staff can request more information at different stages of the workflow by configuring the **Request Info** and **Accept Info** drop-down lists. After you request information, the workflow task is paused and resumed only when the information is accepted using the **Accept Info** option. You will also have an option of sending an e-mail to interested parties when these options are selected for more information. Whether these options are enabled depends on the configuration of your system. For more information on how to configure custom properties to get the drop-down lists for Request Info and Accept Info, 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 **Business License Transactions, Permits, or Planning Applications** tile on the Agency Springboard.
2. Click the row for the business license, permit, or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Alter Workflow** button.
5. On the Alter Workflow make these changes:

- o **New Workflow Activity Name:** Select the desired workflow step.
- o **Update Transaction Status:** Select the proper status for the workflow step. You can't alter a workflow step back to a pending status.
- o **Comments:** It is recommended to note who made the change and describe the circumstances requiring the manual intervention.

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

6. Click **Save**.

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

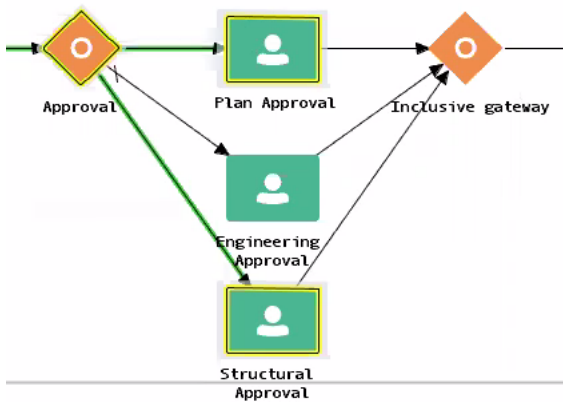
A workflow process definition may contain one or more parallel tasks. Parallel tasks:

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

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

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

This example illustrates a workflow process definition with parallel tasks.



This example illustrates the Alter Workflow tab displaying parallel tasks.

Alter Workflow

▲ Plan Approval

New Workflow Activity Name: Plan Approval

▲ Structural Approval

New Workflow Activity Name: Structural Approval

Update Transaction Status: Submitted

Comments

View Workflow Save Cancel

## Working with Workflow for Reopened Transactions

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

- Completed
- Expired

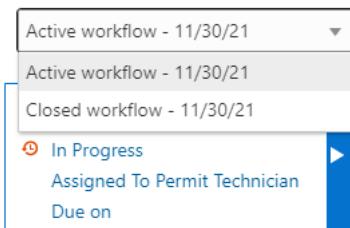
For more information on reopening transactions, see [Reopening a Permit or Planning Application](#).

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

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

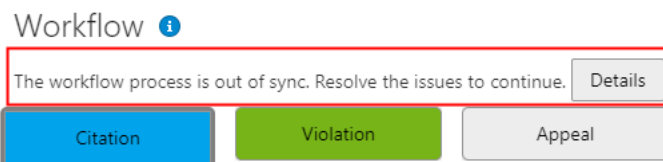
When working with the reopened transaction, the Workflow tab reflects the currently active workflow instance and all previously closed workflow instances for reference. Use the instance drop-down list to select an instance.

### Workflow



## 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 Reports

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

To access the report:

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

### Security Details for Working with Reports

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Planning Reports Management All	Manage reports on planning applications assigned to anyone.	PSC System Administrator PSC Zoning Administrator
PSC Planning Reports Management Self	Manage reports on planning applications assigned to themselves.	PSC Associate Planner 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](#).

### Viewing Reports

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

Page Element	Description
Report Name	View the name of the report.
Report Type	View the type of report: <ul style="list-style-type: none"> <li>Ad hoc</li> <li>System generated</li> </ul>
Application Status	View the status of the application:



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

## Creating an Ad Hoc Report

To manually create an ad hoc report for an application:

1. Navigate to **Agency Springboard > Planning Applications**. Select the application. Select **Reports** in the left navigation panel.
2. Click the **Add Ad Hoc Report** button.
3. On the Add Ad Hoc Report page, use the Category field to select a category of the report, which is set up by your agency in the Ad Hoc Associations section on the Notice and Report Group page. You can select a report from the generated list.  
Use the Search option to search for and select the ad hoc report type. Selecting the ad hoc report type returns you to the Reports page.
4. The new ad hoc report is now listed on the Reports page.

## Generating a Report

To generate a report:

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

4. Click Cancel to close the window and return to the report at a later time. You can use the Continue button to access this page later.
5. Click Done on the Generate Report page. The status of the report changes to Generated and the report is available as an attachment.

## Viewing Report Details

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

1. Navigate to **Agency Springboard > Planning Applications**. Select the application. Select **Reports** in the left navigation panel.
2. Select the report row that you want to view.
3. On the Report Details page, the top section shows the report name, status, and report type.

The Attachments section allows you to view details, download and delete attachments. Example of an attachment can be a copy of the report that was sent to the applicant.

## Working with Meetings

Meetings are scheduled between registered public users and agency staff to review and discuss the requirements of the application submitted for business license, preapplication, 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 preapplication 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

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

## Scheduling a Meeting

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

Planners use the Pre-application Meeting Request page for scheduling preapplication 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, preapplication, 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 preapplication or planning application click **Planning Application** in the left panel.
4. Click the **Meetings** link to view the meetings page for the application.
5. Click the **Schedule Meetings** button.
6. On the meeting request page, the meeting subject, agenda, and the location are displayed as set up in the meeting template applied. Enter values for the following fields:

Page Element	Description
<b>Meeting Subject</b>	<p>Review the subject for the meeting.</p> <p><b>Note:</b> Only specialists or planners can change the subject of the meeting.</p>
<b>Meeting Agenda</b>	<p>Review the agenda for the meeting.</p> <p><b>Note:</b> Only specialists or planners can change the agenda of the meeting.</p>
<b>Scheduled Date</b>	<p>Select a date to schedule the meeting. The dates available for scheduling your meeting are based on the meeting template applied and the agency's holiday calendar.</p> <p>See <i>Setting Up Planning Application Types</i> for the preapplication meeting template and <i>Setting Up Business License Types</i> for the consultation meeting template.</p> <p>For more details about templates, see <i>Setting Up Meetings</i>.</p>
<b>Scheduled Time</b>	<p>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.</p>
<b>Meeting Duration in Hours</b>	<p>View the duration of the meeting, which is set up by the administrator in the template applied.</p>
<b>Meeting Location</b>	<p>View the location of the meeting. Only specialists or planners can change the location of the meeting.</p>
<b>Invitees</b>	<p>View the list of additional invitees for the meeting. Agency staff can add or remove invitees.</p>

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

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

- When you schedule a business meeting, the workflow task **Schedule Business Consultation** will be updated to *Completed*.
- When you schedule a preapplication 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, preapplication, 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 preapplication or planning application click **Planning Application** in the left panel.
4. Click the **Meetings** link to view the meetings page for the application.
5. View the list of meetings, including this information:

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

## Viewing Meetings on the Calendar

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



- **Specialist Calendar** shows the consultation meetings.
- **Planner Calendar** shows the meeting schedules for preapplication, public hearing, and planning application meetings.

1. Select the **Specialist Calendar** tile (for business license) or the **Planner Calendar** tile (for preapplication, 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 preapplication, hearing, and planning application) you can view the details of the meeting schedule. Click the application link to access the transaction application page.

3. On the calendar page you can perform the following actions:

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

## Rescheduling a Meeting

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

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

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

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

## Working with Pre-application Outcome

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

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

## Adding a Required Application

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

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

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

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



## Adding a Review Comment


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

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

## Viewing the Pre-application Outcome

To view the summary information:

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

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

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Edit Comments</i>: Click to open the Required Application page and update the comments.</li> <li>○ <i>Delete</i>: Click to delete the required application type. you can't delete a required application type that is linked to an application.</li> </ul> <p><b>Note:</b> These actions are available only to planners.</p>

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

## Working with Conditions of Approval

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

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

### Security Details for Working with Conditions of Approval

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Conditions of Approval Inquiry	View conditions of approval on planning applications.	PSC Agency Staff – All agency users
PSC Conditions of Approval Administration	Administer conditions of approval on planning applications in any status.	PSC System Administrator
PSC Conditions of Approval Contributor	Manage conditions of approval on planning applications on which the user is assigned as a plan reviewer.  Users can update and delete only the conditions added by themselves.	PSC Plan Reviewer
PSC Conditions of Approval Management All	Manage conditions of approval on planning applications assigned to others and to themselves.	PSC Principal Planner
PSC Conditions of Approval Management Self	Manage conditions of approval on planning applications assigned to themselves.	PSC Associate Planner

For more information on creating roles for 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 and Updating Conditions of Approval

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

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

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




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


## Reordering Conditions of Approval

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

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

(a) Use the reordering icons:

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

Page Element	Description
	Click to move the selected record to the bottom of the list.

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

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

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

## Adding New Conditions

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

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

Page Element	Description
<b>Name</b>	Enter a name for the new condition. You can add more information and use the Rich Text formatting options.
<b>Status</b>	Select a status: <ul style="list-style-type: none"> <li><input type="radio"/> <i>Applied</i></li> <li><input type="radio"/> <i>Resolved</i></li> </ul>
<b>Condition Type</b>	Displays <i>Custom</i> as this condition is added manually by an agency staff.
<b>Category</b>	Select a category of the condition.
<b>Subcategory</b>	Select a subcategory of the condition.
<b>Compliance Period</b>	Select one or more compliance period values using the check boxes.

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

## Applying Existing Conditions

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

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

## Resolving Conditions

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

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

## Deleting Conditions

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

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

## Generating the Conditions of Approval Report

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

To generate and view the conditions of approval report:

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

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

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

## Adding Comments to a Condition

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

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

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

## Modifying and Deleting Comments in a Condition

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

## Adding Attachments to a Condition

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

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

## Deleting Attachments from a Condition

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

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

## Accessing Plan Reviews for Planning Applications

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

## Working with Contractors and Agents in Applications

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

Depending on the type of application and agency setup for managing contractors, the process of adding contractors or entering contractor information can vary.

For example, agency staff and contractors or contacts with permit or planning application access working on their own applications can make updates until the transaction is closed or canceled, whereas only the agency staff with an appropriate business license role can manage contractors until the transaction is closed or canceled.

Applicants can designate a contact person for a contractor license and give the contact access to the permit, planning application, or business license. Agency staff and contractors or contacts with permit or planning application access can indicate whether a contractor is currently performing work and also refresh contractor data from the agency's contractor records or integration with an external source. Other contractor information is read-only except for system administrators.

The Contractor page in the application or transaction details also displays validation alerts for contractors added during application intake and after submittal. Agencies sometimes add extra validations when you add contractors to make sure that contractor licenses meet certain requirements. The license requirements can include a specific license type, classifications, job cost for permits, and insurance attributes. Validations can also check the license expiration date. The alert lists the missing requirements for the active licenses associated with the transaction. Depending on the validation setup, you may not be able to submit the application if requirements aren't met, unless you are agency staff with a contractor management role.

## Entering Contractors for Business License Applications

Depending on the application design, a business application may require applicants to select a contractor license from the agency-maintained list of approved contractor licenses or allow applicants to enter multiple contractors. The agency sets this up in the **Contractor** field group in the intake form. For more information, see [Using the Intake Form Designer for Business License Types](#).

The process of selecting a contractor license from the agency's list of approved contractors on permits and planning applications and some business applications, is described in "Adding Contractors to a Transaction" in this topic. Other business license applications are designed to collect new contractor and contact information, but if an applicant enters a license and it matches license information in the agency's list of approved contractors, the information is brought into the application. For more information, see [Entering Contractor Information](#).

Managing contractor information on business license applications varies by role:

- Public users, including the applicant, contacts, and contractor applicants or contacts, can only view contractor license information once the application is submitted; they can't view the information when the application is in a pending status.

- Agency staff with a Business License Manager, Business License Specialist, or Business License Analyst role can manage, including add, update, and delete, until an application is closed or complete. If the application required the applicant to select a contractor license from the agency's contractor list, only system and business license administrators can manage the contractor information.
- System and business license administrators can manage business license applications regardless of the contractor information entry method or application status.

When adding a contractor license contact to a business license application or contraction registration, you must also indicate whether the contact is the license holder or an authorized agent.

## Adding Contractors to a Transaction

The fields on the Add Contractor page for a contractor license associated with a business license, permit, or planning application correspond to the same-named fields on the agency's main contractor pages. For descriptions of these fields, see *Working with Contractor Licenses*.

You can add contractors and their license information to a transaction, but the steps may vary slightly depending on agency setup. Permits and planning applications as well as business license applications that require applicants to select a contractor license from the agency's list of approved contractors can add contractors as described here.

The **Limit License Usage to Authorized Contacts** switch in the agency-level contractor license options determines whether an applicant can search the full listing of approved contractors or only those they have been approved for.

If the switch is turned on, only the contractor licenses that you are authorized to use are available for selection. If no licenses are available, you won't be able to add a contractor license to the transaction.

If the switch is turned off, you can select from any of the agency-approved contractor licenses. Here are the steps for adding a contractor when you have access to the complete contractor list:

1. Access the detail pages for the business license, permit, or planning application you are working with.
2. Click the **Contractor** link in the left panel to view the Contractor page.
3. If the applicant is either a contractor or a contractor's authorized agent, turn on the switch to indicate yes.
4. Click the **Add Contractor (+)** button.
5. On the Add Contractor page, contractor licenses related to the applicant, if any, appear in the license grid. Click the **Select** button for a license in the grid to add it to the transaction.
6. If you want to search for a different contractor license, click the **Search for All Contractors** button.
7. On the Add Contractor search page, enter values for a contractor. You can search by **Business Name**, **Owner Name**, **License Type**, or **License Number**.

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

8. Click **Find Contractors**.
9. On the Add Contractor search results page, click **Select** to add a contractor. Only approved contractors appear in the results.

If the agency turned on the switch to **Limit License Usage to Authorized Contacts**, then you can only see the contractor licenses that you're authorized to use.

If one or more conditions have been applied to the license, you can click the **View More Details** button for the condition on the Add Contractor page. Click **Cancel** on the Add Contractor page to exit if you want to find a different contractor.



10. Review the contractor details, such as business information, classifications, bonds, insurance, and so on. You can make these changes:
  - o Indicate whether the selected contractor is performing work by selecting the **In Use** check box. Contacts for contractors that are in use appear on the Contacts page in the application details.
  - o Select whether the applicant is a contractor or authorized agent in the **Applicant Role** field. This field is only available if you turned on the switch in step 3 to indicate that the applicant is a contractor or a contractor's authorized agent.
  - o Add or change the contact person for the contractor.

You can select multiple contacts for the license. For each contact, you must choose the contact type. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact initially has business license, permit, or planning application access depending on the agency defaults for the **Contact Type** that you select. But access can be upgraded in the transaction details. For more information, see *Working with Application Contacts*. When adding a contractor license contact to a business license application or contraction registration, you must also indicate whether the contact is the license holder or an authorized agent.

11. Click **Done** to close the contractor details.
12. Click **Save** to save the contractor to the transaction.

## Updating Contractor Information for a Transaction

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

You can select multiple contacts for the license. For each contact, you must choose the contact type. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact initially has a level of business license, permit, or planning application access based on the agency setup for the **Contact Type** that you select. But access can be upgraded in the transaction details. For more information, see *Working with Application Contacts*. When adding a contractor license contact to a business license application or contraction registration, you must also indicate whether the contact is the license holder or an authorized agent.

7. Click **Done** to close the contractor details.
8. Click **Save** to save the contractor to the transaction.

## Removing Contractors from a Transaction

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

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

## Working with Public Hearings

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

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

## Security Details for Working with Public Hearings

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

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

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

## Viewing Public Hearing for a Planning Application

To view a public hearing:

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

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

5. The Decision and Hearing page lists all the scheduled hearings, including the following information:

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

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

## Scheduling and Finalizing a Public Hearing

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

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

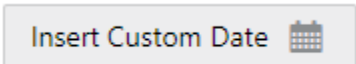

**Note:** You should first ensure that hearings are applicable to the application you have selected. On the Planning Application Type page select the value *Applicable* in the Hearing field (In the Navigator select **Planning and Zoning Setup** and then select **Planning Application Type**).
  - e. Click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

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

## Using the Hearing Scheduler Page

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

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

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

Page Element	Description
	<p><b>Note:</b> Oracle Permitting and Licensing supports multiple templates for printing hearing agendas. For details, see <a href="#">Setting Up Hearing and Decision Making Bodies</a> and <a href="#">Setting Up Reports</a>.</p>

## Finalizing the Hearing

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

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

### Performing Actions

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

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

Page Element	Description
	<p><b>Note:</b> The hearing decision made by the highest decision making body in the hierarchy is the final. The option to appeal is not available for the particular hearing.</p> <p>See the next section for details on requesting appeal.</p>

## Updating Decision

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

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

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

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

When you update the decision here, the workflow task **Hearings** will behave based on the administrator's configuration on the Business Rules Framework. For example, when a scheduled hearing was finalized by a hearing body and you save the decision as **Approved** on this page, then the **Hearings** workflow task status will automatically change to Approved and the workflow task will advance to **Appeals** with In Progress status.

System administrators configure the Update Workflow action for the Hearing Decision Changed event, which is a one-time setup to trigger the workflow advancement. For information on setting up actions related to workflow, see *Setting Up Update Workflow Actions*.

## Updating Staff Recommendation

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

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

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

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

## Viewing the Details

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



Page Element	Description
<b>Decision Making Body</b>	View the name of the decision making body.
<b>Schedule Status</b>	View the status of the schedule.
<b>Decision Date</b>	View the date on which the hearing is scheduled.
<b>Decision</b>	View the decision status.
<b>Comments</b>	Enter comments regarding the hearing decision.
<b>Appeal Status</b>	View the appeal status.
<b>Appeal Date</b>	View the date on which an appeal was filed.
<b>Staff Recommendation Date</b>	View the date on which a staff recommendation was added.
<b>Staff Recommendation</b>	View the staff recommendation added.
<b>Comments</b>	View any comments for the staff recommendation.

## Generating a Hearing Notifications List

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

You generate hearing notifications on the Public Notification page. The following steps provide hearing-specific navigation instructions followed by the standard steps for generating recipient lists for public notifications. For more information, see [Creating Map-Based Public Notification Lists](#).

To generate a hearing notification list:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. From the list of planning applications on the Transactions page, click a planning application to access the Planning Application page.
3. Click **Planning Application** in the left panel of the Planning Application page.
4. Click the **Decision and Hearing** link under **Planning Application** to view the list of hearings.
5. Select the **Actions** button for the row and select **Generate Notifications List** from the menu that appears.

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

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

6. If the default parcel selection is not correct, modify the selection as described in [Creating Map-Based Public Notification Lists](#).

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

7. Click **Apply** to update the notification area with your selection.
8. 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.

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

The notification process is not part of the Oracle system.

## Working with Appeals

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

### Security Details for Working with Appeals

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

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

For more information on creating roles for 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](#).

### Requesting an Appeal

Use the Hearings page to request an appeal:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application you are working with.

3. On the Planning Application page, click **Planning Application** in the left panel.
4. Click the **Hearings** link under **Planning Application** to view the Hearings page.
5. Click the **Actions** icon on the hearing row for which you want to appeal and select the **Request Appeal** option.

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

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

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

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

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

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

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

## Viewing an Appeal Request

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

1. Select the **Planning Applications** tile on the Agency Springboard.
2. On the Planning Applications tab of the Transactions page, select the application you are working with.
3. On the Planning Application page, click **Planning Application** in the left panel.
4. Click the **Hearings** link under **Planning Application** to view the Hearings page.

5. On the hearing row for which you want to view the appeal request, click the **Actions** icon and select **View Appeal Request**.
6. View the details of the appeal request on the Request Appeal page.

## Viewing Appeal Fee Details

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

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

## 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 applications as well as update and make the contacts inactive. See the section "Security Details for Adding Contacts to Applications" for information about setting up security for agency staff, applicants, and application contacts to manage contacts.

There are two options for adding more contacts:

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

When a contractor license is added to an intake form or after the application was submitted, the contractor's contact person is added to the list of application contacts. Application contacts have application access depending on the selected contact type, which is set up by your agency. But agency staff, applicants, and other contacts with full application access can upgrade a contractor contact's access to an application on the application's Contacts page.

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

## Business Licenses

Primary Role	Access Description	Associated Job Roles and Abstract Roles
Registered Public User	Add and update contacts in business license 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 Business License Contacts Management	Add and update contacts in business license application while the application is currently being processed.	PSC Business License Application Administrator PSC Business License Manager PSC Business License Specialist
PSC Business License Management with Elevated Access	Add, update, and delete contacts in business license applications at all times, whether it is open and being processed, closed, or complete.	PSC Business License Application Administrator PSC Business License Manager
PSC System Administrator	Add, update, and delete contacts in business license applications at all times, whether it is open and being processed, closed, or complete.	PSC System Administrator Application Implementation Consultant

**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 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: **Business License Transactions, Permits, or Planning Applications**.
2. On the Transactions page, click the application row.
3. In the left navigation panel, expand the application information section: **License Information, Permit Information, or Planning Application**.
4. Select **Contacts** in the expanded section.

The applicant and 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.

Page Element	Description
<b>Title</b>	The business title of the contact.
<b>Phone</b>	The phone number of the contact.
<b>Type</b>	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.
<b>Business</b>	The business name of the contact.
<b>Contractor License, License Holder, and License Type</b>	<p>The contractor license number and the license type associated with the license.</p> <p>This information appears when the contact is associated with the contractor license. When adding a contractor license contact to a business license application or contraction registration, you must indicate whether the contact is the license holder or an authorized agent.</p>
<b>Access</b>	<p>Indicates the type of access the contact has to the application:</p> <ul style="list-style-type: none"> <li>○ Full</li> <li>○ None</li> <li>○ View, pay, print: This contact type is applicable only to business licenses. Contacts of this type can view the license, pay fees, and print the license certificate.</li> </ul>
<b>Primary</b>	<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><b>Note:</b> The primary contact has the same application access as the applicant regardless of the access defined for their contact type.</p>
<b>Active</b>	Indicates whether this is an active contact.
	<p>Click the <b>Actions</b> 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

The applicant, contacts with full application access, and agency staff can manually add contacts to the application. Only system administrators and applicants can add contacts from the applicant's user profile.

Here's how to contacts from the applicant's user profile:

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. Enter details on the Select Contact Type modal page:

Page Element	Description
<b>Type</b>	<p>Search and select a contact type using the lookup prompt. The search results list all the available contact types with description and the access they have, which is set up by your administrator:</p> <ul style="list-style-type: none"> <li>○ Full</li> <li>○ None</li> <li>○ View, Pay, and Print</li> </ul> <p>The <b>View, Pay, and Print</b> option is available only for business license applications. Contacts can only view the application, pay the fees, and print the license certificate.</p>
<b>Primary Contact</b>	<p>Turn on this switch to make the selected contact person the primary contact for this application.</p>
<b>Access</b>	<p>View the default access as set up by your administrator for the selected contact. You can only allow more access to the contact by selecting from other options.</p>

4. 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.
3. On the blank Contact Details entry page, enter the new contact's name, business name, title, address, phone, and email information.

**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.

Page Element	Description
<b>Type</b>	<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>



Page Element	Description
	The available contact types are listed with description and the access they have, which are set up by your administrator.
<b>Active</b>	<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>
<b>Primary Contact</b>	Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.
<b>Access</b>	<p>View the default access as set up by your administrator for the selected contact.</p> <ul style="list-style-type: none"> <li>○ Full</li> <li>○ View, Pay, and Print (applicable only for business license applications)</li> <li>○ None</li> </ul> <p>You can only allow more access to the contact by selecting from other options.</p> <p>See <i>Setting Up Contact Types</i>.</p>
<b>Add this contact to the applicant's account</b>	<p>Select the check box if you want to save this new contact in the applicant's account as well as on the current application.</p> <p><b>Note:</b> Only applicants and system administrators can add contacts to the applicant's account. For applicants, this option is displayed as <b>Add this contact to my account</b>.</p>

4. Click **Save**.

For information about adding contractor license contacts to an application, see *Adding Licenses to an Application Form* and *Working with Contractors and Agents in Applications*.

## Updating Application Contacts

1. 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.
  - 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.
  - All fields are available for updates for contacts other than the applicant.
3. 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**.

## Applying Conditions to Applications

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

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

The condition indicator in the header of the details pages displays the most severe condition. Click the **All Conditions** link next to the icon to see a list of all applicable conditions, including the condition name, severity, source, source reference, display message, and when the condition was applied. Click a condition row to open the application's Conditions detail page in a new window.

If the condition was automatically applied, a condition source reference link is displayed only to the agency staff. Click the link to access the Condition Details page from the source application that applied the condition.

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

## Security Details for Applying Conditions to Applications

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

### Permit application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permit Conditions Management	Apply and resolve conditions on permits.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Cashier PSC Business Analyst PSC Building Inspector PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

### Planning application

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

### Business license application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Business License Conditions Management	Apply and resolve conditions on business license applications and licenses.	PSC Business Analyst PSC Business License Inspection Supervisor PSC Business License Inspector

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Business License Manager PSC Business License Specialist PSC Cashier PSC Code Enforcement Application Administrator PSC Permits Application Administrator PSC Planning and Zoning Application Administrator PSC Zoning 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](#).

## Viewing Conditions

The Conditions page lists all the conditions applied to the transaction. You can download the conditions as a report in a format set up by your agency.

1. Select the **Business License Transactions, Permits, or Planning Applications** tile on the agency springboard.
2. Select a transaction row.
3. Select the **Conditions** tab, which may be listed under the License Information, Registration Information, Permit Information, or Planning Application heading in the navigation bar.
4. On the Conditions page, view the list of applied and resolved conditions with details:

Page Element	Description
<b>Condition Name</b>	The name of the condition selected by the agency staff at the time of applying the condition.
<b>Severity</b>	The level of severity defined for the selected condition.
<b>Source</b>	The source from where the condition was applied, such as parcel, address, person, contractor license, or business license.
<b>Source Reference</b>	<p>Displays a condition identifier link only if the condition was applied automatically. Click the link to open the Condition Details page from the source application that applied the condition. This link is available only for agency staff access.</p> <p>When an agency staff applies a condition to an parcel, address, person, or contractor license by enabling the <b>Apply Condition to Transactions</b> option, then the condition is automatically applied to all transactions belonging to the source application. If the condition was applied</p>

Page Element	Description
	to a business license with the <b>Apply Condition to Transactions</b> option turned on, then the condition is automatically applied to all business license applications related to the license. For details, see <a href="#">Setting Up Conditions</a> .
<b>Applied Date</b>	The date when the condition was applied.
<b>Display Message</b>	The message entered at the time of applying the condition.
<b>Status</b>	The status of the condition such as Applied or Resolved.
<b>Priority</b>	The priority selected - High, Medium, or Low.
<b>Resolved Date</b>	The date when the condition was resolved.
<b>Resolve</b>	The button used for resolving a condition.
<b>View More Details</b>	Click this icon to open the Condition Details page and view detailed information.

## Automatically Applying Conditions Using Business Rules Framework

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

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




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

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

## Applying a Condition to a Transaction

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

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

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

Page Element	Description
<b>Additional Information</b>	Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.

When you're viewing the condition details after the condition was applied, you'll see the name of the user who applied the condition and the date. When the condition was applied automatically, you'll see:

- *System* is displayed if the condition is applied to the transactions by inheriting the condition that was applied to the parcel, address, person, business license, or contractor license.
- *Business Rules Framework* is displayed if the condition is applied to the transaction through Business Rules Framework events.

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

## Resolving a Condition

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

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

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

## Modifying a Condition

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

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

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

6. Click **Save**.

## Viewing a Resolved Condition

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

1. Select the **Business License Transactions, Permits, or Planning Applications** tile on the agency springboard.
2. Select a transaction row.
3. Click **Conditions** in the navigation bar.

4. Select a row with a status of **Resolved** and click **View Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
  - o Resolution Action
  - o Resolved By
  - o Resolved Date

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

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

## Working with Attachments

You view a list of files and upload or download documents associated with a transaction or record, such as a business license, permit, planning application, case, 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	<p>Add and update attachments to submitted permits until they are closed.</p> <p>View all attachments on applications for which the user is the applicant.</p>	PSC Registered Public User
PSC Agency Permits Inquiry	View permit attachments.	PSC Agency Staff – All agency users
PSC Permits Attachments User	<p>Add attachments to permits.</p> <p>Update and delete attachments added by themselves.</p>	<p>PSC Inspections Supervisor</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Chief Building Officer</p> <p>PSC Cashier</p> <p>PSC Building Inspector</p> <p>PSC Apply Permit Duty</p> <p>PSC System Administrator</p> <p>PSC Principal Planner</p> <p>PSC Planning Coordinator</p> <p>PSC Plan Reviewer</p> <p>PSC Permits Supervisor</p> <p>PSC Permit Technician</p>
PSC Add Permit Attachments	Add permit attachments.	<p>PSC Inspections Supervisor</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Chief Building Officer</p> <p>PSC Cashier</p> <p>PSC Building Inspector</p> <p>PSC Apply Permit Duty</p> <p>PSC System Administrator</p> <p>PSC Principal Planner</p> <p>PSC Planning Coordinator</p>

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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
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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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. For example, the Attachments page for a business license renewal application displays the **Business License**, **Inspection**, and **All** tabs. Let's take a look at the different available tabs:

- The **Business License** tab displays attachments added through the business license transaction's Attachments page.
- The **Permits** tab displays attachments added through the permit's 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.

Any business license contact with view or full access including the applicant and primary contact can view or download attachments on the business license they are associated with. The applicant, primary contact, and contacts with full access can also add attachments, however they can update or delete only the attachments that they added.

## 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 <b>Uploaded Documents</b> 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>
<p>Protected document icons:</p>  - Edit Protected Document	<p>Displayed when a protected PDF document is added to an application in the system. The icon displayed depends on how your agency handles protected documents for permits and planning applications. A protected PDF document has any setting that is controlled by a password or is otherwise secured.</p>

Page Element	Description
 - Archive Protected Document   - Archive Protected or Protected Editable Document	<p><b>Note:</b> The system will always prevent you from uploading to an application password-protected documents that require a password to open.</p>
	<p>Click the Select to Preview Attachment icon for PDF files (shown here) or a thumbnail for most types of image files (such as BMP, GIF, JPEG, and PNG) to open the Attachment Preview page.</p> <p>On the preview page, you can see the first page of a PDF document or a larger version of an image file. Attachment preview is available for permits, planning applications, business licenses, code cases, account management, and contractors.</p>
<p><b>File Name</b></p>	<p>View the following information in the <b>Filename</b> field:</p> <ul style="list-style-type: none"> <li>○ Icon indicating the file type</li> <li>○ Filename with file type extension</li> <li>○ <i>File Size</i></li> </ul>
<p><b>Description</b></p>	<p>View the description of the attachment as entered by the person who added the attachment.</p>
<p><b>Source</b> 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"> <li>○ <i>Permits</i></li> <li>○ <i>Inspection</i></li> <li>○ <i>Workflow</i></li> <li>○ <i>Plan Reviews</i></li> </ul> <p>Attachments that are added to electronic plan reviews have their source changed from <i>Permits</i> to <i>Plan Reviews</i>. For example, attachments added through Oracle Inspector display <i>Inspection</i> in this field.</p> <p>Attachments added to web form questionnaire responses display <i>Permits</i> in this field.</p> <p><b>Note:</b> This column appears only on the All tab for permits.</p>
<p><b>Uploaded By</b></p>	<p>View the name of the person who uploaded the file along with the date and time when the person uploaded the file. Registered public users see <i>Staff</i> instead of a name.</p>

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

#### Permits

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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

### Planning application

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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

## Parcels

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Parcel Comments Inquiry	Allows users to view parcel comments.	PSC Property Setup Administration PSC Agency Staff PSC Property Setup Inquiry
PSC Manage Parcel Comments added by self	Allows users to add, update and delete parcel comments added by themselves.	PSC Property Setup Administration PSC Agency Staff
PSC Manage Parcel Comments added by self and others	Allows users to add, update and delete parcel comments added by themselves and others.	PSC Property Setup Administration

**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, parcel, 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.

**Note:** Only authorized agency users can view, add or delete the comments for a parcel. Parcel comments are not displayed for public users.

4. Click **Save**.

## Adding a New Comment

1. Access the detail page for the transaction, parcel, 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.

**Note:** Only authorized agency users can add comments for a parcel. Parcel comments are not displayed for public users. Hence, the **Hide from Public** icon on the Add Comment page for parcels is locked and cannot be toggled.

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

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

## Adding Favorite, Standard, and Recent Comments

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



- *Recent*: Comments that were recently posted.

2. Select a comment and click the **Insert** button to post the comment.

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

See *Managing Comments*.

## Working with Fees and Payments

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

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

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

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

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

### Viewing Fees and Payments for an Application

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

Page Element	Description
<b>Fee Description</b>	The description of the fee as defined when creating a fee item.
<b>Amount</b>	The amount due for each fee.
<b>Currency</b>	The currency in which the transaction is paid.
<b>Status</b>	<ul style="list-style-type: none"> <li>◦ <i>Canceled</i>: Indicates the fee payment is no longer required.</li> <li>◦ <i>Pending</i>: Indicates the fee is pending the agency's finalization. The fee may or may not become due.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Hold</i>: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved.</li> <li>○ <i>Due</i>: Indicates the current fee request is due and needs to be paid.</li> <li>○ <i>Refund Pending</i>: Indicates that a refund was submitted for processing and approval.</li> <li>○ <i>Refunded</i>: Indicates the fee was reversed and a refund was issued.</li> <li>○ <i>Void</i>: Indicates the refund for the fee was voided.</li> <li>○ <i>Waived</i>: Indicates the applicant no longer has to pay the fee because it's been waived.</li> <li>○ <i>Payment in Process</i>: Indicates that the fee payment was initiated but not yet resolved. Typically this status is temporary and resolved to <i>Paid</i> once the payment is recorded in the application. When the status changes to <i>Paid</i>, click the <i>Paid</i> link to download and view the payment receipt in the format set up by your agency.</li> </ul>
<b>Department</b>	The department within the agency requiring the payment.
<b>Assessed Date</b>	The date the request for payment was issued.
<b>Payment Date</b> (and payer name)	<p>The date payment was received.</p> <p>This field also displays the payer name, which depends on the payment method:</p> <ul style="list-style-type: none"> <li>○ Cash: The name provided by the customer to the cashier.</li> <li>○ Check: The name recorded during payment processing, usually the name on the check.</li> <li>○ Credit or debit card: The name returned by the payment processor.</li> <li>○ Offline: The name recorded during payment processing.</li> <li>○ PayPal: The name returned by the PayPal.</li> <li>○ Trust account: No name is displayed.</li> </ul>
<b>Payment Reference</b>	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
<b>Invoice</b>	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
<b>Total Fees</b>	The total amount of fees that may be applicable to the application.
<b>Total Payable</b>	<p>The amount of fees that are designated as payable.</p> <p>The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.</p>
<b>Total Paid</b>	The amount of the total fees already collected.

Page Element	Description
<b>Balance Due</b>	The remaining portion of the fees yet to be collected.
<b>Pay</b>	<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><b>Note:</b> The <b>Pay</b> button takes applicants and contacts with application access directly to the Checkout page in payment services.</p>
<b>View Deposit Accounts</b>	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 business license, permit, and planning application 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.

**Note:** You can't select paid fee items that contain a reversed amount.

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.

**Note:**

Do not use the Excess Paid refund reason for fee refunds. This reason is reserved for overpayment refunds which are initiated on the Payments on Account page.

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](#).

## Creating External Cash Transactions

Agencies can automate the reconciliation of permitting and licensing payments, refunds, and reversal transactions to the bank statement in Oracle Fusion Cash Management. The scheduled process, Create External Cash Transactions, enables agency staff to create transactions for a specific bank account.

Make sure that bank reconciliation options are configured for all types of transactions for which you want to create external cash transactions in Oracle Fusion Cash Management.

1. Run the Prepare Bank Reconciliation Transactions Oracle Enterprise Scheduler (ESS) job to populate the **Bank Reconciliation Activities List** page.
2. Run the Create External Cash Transactions ESS job to create transactions for a specific bank account.

For more information, see *Using the Process Monitor*.

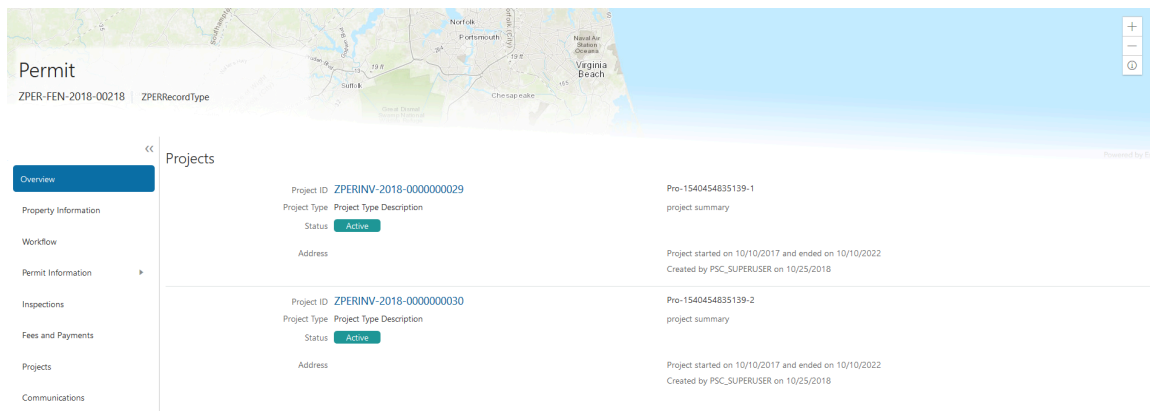
After the job completes, you can refresh the **Bank Reconciliation Activities List** page to see that unpublished rows become published.

## Viewing Project Summaries

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

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

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



## Viewing the Project Summary

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

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

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

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

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

## 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.

#### Permit application



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

### Planning application

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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
<b>Channel Type</b>	Specify what type of ad hoc message you want to send. Values are: <ul style="list-style-type: none"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> <li>○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users.</li> </ul> <p><b>Note:</b> The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
<b>Visibility</b>	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: <ul style="list-style-type: none"> <li>○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction.</li> </ul>

Page Elements	Definition
	<ul style="list-style-type: none"> <li>○ <i>Agency staff only</i>: Includes only agency staff.</li> <li>○ <i>Applicant and Primary Contact</i>:: Includes agency staff and the primary contact on the transaction.</li> </ul> <p><b>Note:</b> This option is presently not applicable for Code Enforcement.</p>
<p><b>Display Format</b></p>	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>HTML</i>: Displays rich text, links, and images</li> <li>○ <i>Text</i>: Displays plain, unformatted text.</li> </ul> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<p><b>Create Web Form</b></p>	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
<p><b>Priority</b></p>	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p><b>User Can Delete</b></p>	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p><b>Insert Web Form</b></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><b>To</b></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>

Page Elements	Definition
	<p>Enter the email addresses, user IDs, or phone numbers of the people or organizations that you want to send the communication to.</p> <p><b>Note:</b> Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p> <p>For more information, see <a href="#">Using Attributes in Communication Templates</a>.</p>
<p><b>Cc and Bcc</b></p> <p></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><b>Note:</b> These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<p><b>Attachments</b></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><b>From</b></p> <p></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> <p><b>Note:</b> Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
<p><b>Subject</b></p> <p></p>	<p>Enter a brief description of the purpose and content of the message or click + to select attributes to include.</p> <p><b>Note:</b> This field doesn't appear for the <i>Text</i> channel type.</p>
<p><b>Message Body</b></p>	<p>Enter or click + to select attributes for the main body text of the message.</p>

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

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

4. Click **Send**.

## Communicating Using a Web Form

You can create and send emails or notifications that contain an online form with questions for the applicant, responsible party, or other agency staff. The correspondence contains a link that the recipient can use to access and respond to the questionnaire. Note that contacts can't access web forms or web form attachments.

Here's how to create a web form:

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

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

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

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

## Viewing Application Communications

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

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

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

Click Communications in the navigation bar.

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

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

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

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

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

- o Click the **View More Details** button to view detailed information about the message.
- o 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
<b>Reference Name</b>	Enter a unique name for the alert.
<b>Start Date Time</b> and <b>End Date Time</b>	Enter the date and time when the alert starts and stops displaying.
<b>Enabled</b>	Turn on the switch to activate the alert.
<b>To</b>	<p>Enter a value for the target recipients of the alert:</p> <ul style="list-style-type: none"> <li>○ Individual Registered Users Enter comma-separated user IDs for the registered users, for example, <b>SYSTEM_ADMIN</b>, <b>BUSINESS_ANALYST</b>.</li> <li>○ All Registered Users Enter this attribute: <b>#{User}</b>. The application displays the alert when the registered user logs in.</li> <li>○ All Anonymous Users Enter this attribute: <b>#{Anonymous}</b>.</li> <li>○ A Combination of Users Enter a string including comma-separated user IDs for the registered users, <b>#{User}</b> for all registered users, and <b>#{Anonymous}</b> for all anonymous users.</li> </ul>
<b>Message Body</b>	Enter the main body of the alert using plain, unformatted text.
<b>Select and Insert</b>	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click <b>Insert</b>, the <b>#{Current Date}</b> variable appears in the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see <i>Using Attributes in Communication Templates</i>.</p>
<b>Remarks</b>	Enter any reference information for agency use. These remarks are not included in the displayed alert.

Page Element	Description

4. Click **Save**.

## Modifying Ad Hoc Alerts

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

## Deleting Ad Hoc Alerts

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

## Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
<b>Channel Type</b>	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> <li>○ <i>Notification</i>: Generates a notification that appears when users click the <b>Notifications</b> button in the header at the top of the page in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service.</li> </ul> <p><b>Note:</b> The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
<b>Visibility</b>	<p>Select which users can see this message. All communications can be seen by agency staff. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction.</li> <li>○ <i>Agency staff only</i>: Includes only agency staff.</li> <li>○ <i>Applicant</i>: Includes agency staff and the applicant on the transaction.</li> </ul>



Page Elements	Definition
<p><b>Display Format</b></p>	<p>Select the display format of the message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>HTML</i>: Displays rich text, links, and images</li> <li>○ <i>Text</i>: Displays plain, unformatted text.</li> </ul> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<p><b>Priority</b></p>	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p><b>User Can Delete</b></p>	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p><b>Note:</b> This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
<p><b>Select and Insert</b></p>	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click <b>Insert</b>, the <code>#{Current Date}</code> variable appears in the <b>Message Body</b> field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see <a href="#">Using Attributes in Communication Templates</a>.</p>
<p><b>Reference</b></p>	<p>Enter a unique alphanumeric reference for the communication.</p>
<p><b>To</b></p>	<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>

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

4. Click **Send**.

## 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 business license, permit, or planning application to access the detail.
3. Click the **Additional Information** menu item in the left panel.
4. Click the **Status History** link to view the Status History page for the permit or planning application.

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

## 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.

### 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, subapplication, or linked application. You can also remove links between related transactions.

Agency staff can also 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.

When you manually link one transaction with another, you can select the type of relation between them, which can be Primary, Subapplication, or Linked. The relation type you choose to link your application determines the relation type the linked application will have with the source application.

**Note:** Only a permit can be assigned as a primary application.

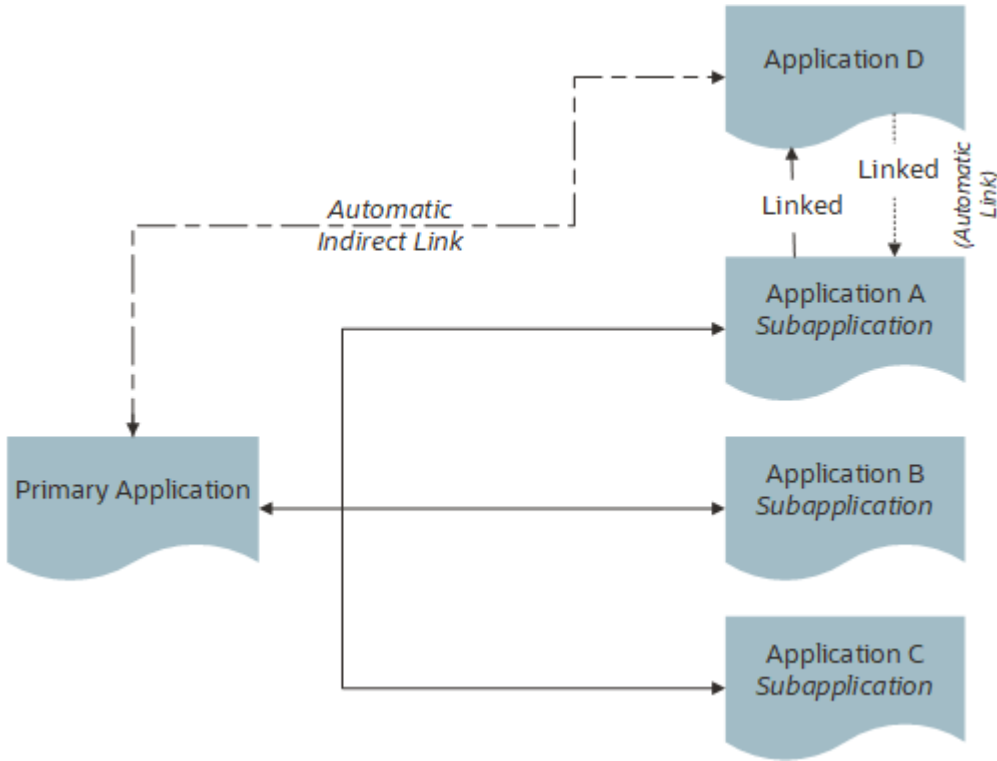
For example, if you link the current application to another application with the link type Primary, that application will automatically be linked to the current application with the link type Subapplication. Similarly, if you link the current application to another with a link type Subapplication, the current application will automatically become the primary application.

**Note:** A primary application can be linked to multiple subapplications but a subapplication can be linked to only *one* primary application. Both type of applications can be linked to other applications using the link type—Linked. Also, once a permit is marked as a subapplication, the system disables the option to link the application as Primary.

Existing applications that are in terminal statuses such as Completed, Canceled, Withdrawn, or Denied are NOT available for selection.

As a result of the linking, an indirect link is automatically created between your current transaction application and the applications that are directly linked to your linked application.

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
<b>Show</b>	<p>Select the filter option to list the applications linked by the types:</p> <ul style="list-style-type: none"> <li>○ All</li> <li>○ Primary</li> <li>○ Subapplication</li> <li>○ Linked</li> </ul> <p>This option displays the count of applications for each type in parentheses.</p>
<b>Include Indirect Links</b> <count>	<p>Turn on the switch to list the indirectly linked applications for each application record. This switch is turned off by default.</p>
<b>Transaction</b>	<p>View the identifier of the linked transaction and a link to access the application detail.</p> <p><b>Note:</b> The detail link is available only for agency staff. Public users accessing this page for their transaction can only view the identifier of the application or case. They cannot drill down to the detail page.</p>
<b>Classification</b>	<p>Shows the type of transaction.</p>
<b>Transaction Status</b>	<p>View the status of the transaction or case and the date of update.</p>
<b>Source</b>	<p>View the detail of the linking transaction:</p> <ul style="list-style-type: none"> <li>○ Direct link: Shows the name of the user who linked the application and the date of linking.</li> <li>○ Indirect link: Shows the link type of the linked application—primary, subapplication, or linked. Click the identifier link to access the application.</li> </ul>
	<p>Click and choose from options to:</p> <ul style="list-style-type: none"> <li>○ Mark a transaction as subapplication or linked.</li> <li>○ Remove the link between applications, or</li> <li>○ Apply conditions of approval to permits.</li> </ul>

Page Element	Description
	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 that are open for linking are listed by default.

5. Select all the desired applications or cases using the check boxes and then click the **Add Selected As** button to view the options to link to your source application:
  - o *Primary*
  - o *Subapplication*
  - o *Linked*

**Note:** For permits, the options available for selection depend on the current application's type—Primary, Subapplication, or a single application submitted without marking it as primary or subapplication.

Select one of the options to establish a link between the source application and the selected 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 registered public users such as applicants and contact users with appropriate permissions can take action to establish links between transactions. Only agency staff can manage related transactions for code enforcement cases.

As an applicant or contact user you can remove 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 Subapplication
- Mark as Linked
- Remove Application Link (Not available for an automatically linked transaction)
- Apply Conditions of Approval: Add conditions of approval to the current permit.

This option is available only for permits. See *Working with Permit Conditions of Approval*

The options available in the **Actions** menu of an application are based on the existing link type:

Application Link Type	Actions available
<b>Primary</b>	<ul style="list-style-type: none"> <li>• Mark as Linked</li> <li>• Remove Application Link</li> </ul>
<b>Subapplication</b>	<ul style="list-style-type: none"> <li>• Mark as Linked</li> <li>• Remove Application Link</li> </ul>
<b>Linked</b>	<ul style="list-style-type: none"> <li>• Mark as Primary: Available only if there is no primary permit linked to the application.</li> <li>• Mark as Subapplication</li> <li>• Remove Application Link</li> </ul>
<b>Indirect</b>	Mark as Linked



# 6 Working with Planning Application Expiration

## Security Details for Working with Planning Application Expiration

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Administer Planning Expiration Date	Administer the expiration date on the planning overview page.	PSC Zoning Administrator PSC Principal Planner
PSC Update Planning Expiration Date	Update the expiration date on the planning overview page.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC System Administrator 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](#).

## 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 preapplications define the following:

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

An example for preapplication expiration might be like this: The applicant submits the preapplication 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 preapplication is complete until they submit the planning application. There may be a grace period and extensions for preapplication expiration dates.

## Processing Expiration Status

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

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

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

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

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

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

## Working with Application Expiration

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

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

### Viewing the Expiration Dates

Here's how you can view expiration dates:

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

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

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

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

### Extending Expiration Dates

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

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

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

## 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"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> </ul> <p><b>Note:</b> <i>Daily</i> is the recommended option for running the expiration status update process.</p>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hours</i> or <i>Minutes</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<b>Repeat – By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>

Page Element	Description
<b>Repeat – By date</b>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<b>Month</b>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

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

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

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

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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





# 7 Recording and Billing Time

## Security Details for Recording and Billing Time

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

### Permit application

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

### Planning application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Planning Time Recording Inquiry	View time recording on planning applications.	PSC Agency Staff - All agency users

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Planning Time Recording Management All	Manage time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner PSC Planning Assistant PSC Associate Planner PSC Plan Reviewer

### Code enforcement

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Case Time Recording Management assigned to self	Allows users to manage case time recordings assigned to themselves.	PSC Code Enforcement Application Administrator PSC System Administrator PSC Code Enforcement Officer PSC Code Enforcement Technician
PSC Case Time Recording Management for All	Allows users to manage case time recordings assigned to all.	PSC Code Enforcement Application Administrator 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](#).

## Adding Time Entries

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

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

### Accessing Time Entry

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

This is an example of a Time Recording page

The screenshot displays the City of Innovation Agency Springboard interface. At the top, there is a navigation bar with the City of Innovation logo and a search bar. Below the navigation bar is a map showing a residential area with street names like San Antonio Ave and 14th St. A red pin is placed on the map at the address 1421 San Antonio Ave, Alameda. To the left of the map, there is a sidebar with a 'Case' section containing the following information: Hearing C-221215-00483 | Inoperable Vehicle, 1421 San Antonio Ave, Alameda.

Below the map, there is a 'Time Recording' section. It features a table with columns for Fee Source, Name, Category, Subcategory, Date, Hours, Minutes, and Billable. The table is filtered to show 'Recorded Time' transactions. There are three rows of data in the table:

Fee Source	Name	Category	Subcategory	Date	Hours	Minutes	Billable
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Meeting	1/11/23	1	0	Yes
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Documentation	1/12/23	1	30	Yes
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Research	1/11/23	2	30	Yes

On the left side of the 'Time Recording' section, there is a sidebar with a list of navigation options: Overview, Timeline, Property Information, Workflow, Inspections, Notices, Communication, Case Information, Responsible Parties, Citations, Time Recording (highlighted), Fees and Payments, and Related Transactions.

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

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

Transaction	Transaction Description	Source	Source Description	Property	City	State	Postal Code	Transaction Status	Last Date Time Recorded	Total Hours	Total Minutes
C-230105-00485	Overgrown Vegetation	CINS-230105-00002	Inspection	650 Grand St	Alameda	California	94501	In Compliance			
C-230105-00485	Overgrown Vegetation	Case		650 Grand St	Alameda	California	94501	Compliance			
C-221215-00482	Inoperable Vehicle	Case		2070 Clinton Avenue	ALAMEDA	California	94501	Warning			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 2	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 5	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 3	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 1	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 4	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
C-221215-00483	Inoperable Vehicle	Case		1421 San Antonio Ave	Alameda	California	94501	Hearing	1/12/23	5	0

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

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

## Adding a Time Entry

1. Access the transaction that you want to add time for.

2. Click **Add Time**.

This is an example of the Time Details page

The screenshot shows the 'Time Details' page for case C-221215-00483. It includes a search bar for Name (filled with 'Sam Cook'), a date picker (filled with '3/10/23'), a search bar for Time Type Code (filled with 'CECASEDOC'), and dropdown menus for Category ('CE Case') and Subcategory ('CE\_Case\_Documentation'). There are input fields for Hours ('2') and Minutes ('30'), and toggle switches for 'Billable' and 'Assess Now', both of which are turned on. A 'Total Fees' field is present but empty. A large text area for 'Comments' is at the bottom. 'Cancel' and 'Save' buttons are in the bottom right corner.

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

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

Page Element	Description
<b>Assess Now</b>	Use this switch to indicate whether the fees associated with this time entry are assessed immediately when you save it.  <b>Note:</b> This switch appears only for staff who have the ability to enter time for others. It is disabled when the <b>Billable</b> switch is turned off.
<b>Total Fees</b>	Displays the fees associated with the time entry, whenever applicable.
<b>Comments</b>	Enter any additional information you want to record for the time entry.

4. Click **Save**.

## Modifying a Time Entry

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

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

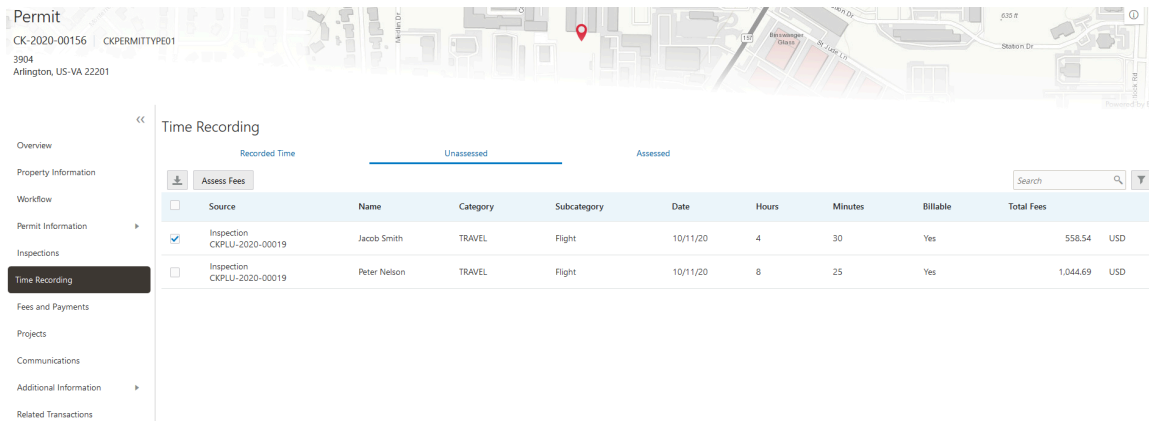
## Assessing Fees for Time Entries

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

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

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

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



This page has three tabs:

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

## Security Details for Assessing Fees for Time Entries

This section describes important security roles, requirements, or considerations specific to assessing fees for time entries.

Security roles for assessing fees for time entries for planning applications.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assess fees Time Recording on Planning applications for All	Assess time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner
PSC Assess fees Time Recording on Planning applications for self	Assess time recording on planning applications assigned to themselves.	PSC Planning Assistant PSC Associate Planner

Security roles for assessing fees for time entries for permits.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assess fees Time Recording on Permits for All	Allows user to assess time recording on permits assigned to all.	PSC Permit Supervisor PSC Principal Planner PSC System Administrator PSC Permits Application Administrator PSC Chief Building Officer

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Inspections Supervisor PSC Planning Coordinator
PSC Assess fees Time Recording on Permits for self	Allows user to assess time recording on permits assigned to self.	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](#).

## Assessing Fees for Time Entries

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

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

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

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

## Accessing Unassessed Time Fees from the Agency Springboard

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

This example shows the Unassessed Time Fees page

Unassessed Time Fees

Show All Statuses

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

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

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



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



# 8 Managing Plan Reviews

## Security Details for Managing Plan Reviews

This topic describes important security roles, requirements, or considerations specific to managing plan reviews in permits and planning applications.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View plan reviews on applications on which the current user is the applicant.	PSC Registered Public User
PSC Agency Permits Inquiry	View all plan reviews and comments.	PSC Agency Staff - All agency users
PSC Agency Planning and Zoning Inquiry	View all plan reviews and comments.	PSC Agency Staff - All agency users
PSC Add Comments to Plan Reviews Assigned to Self	Add comments to plan reviews assigned to self.	PSC Plan Reviewer
PSC Add Comments to Plan Reviews Assigned to Others and Self	Add comments to all plan reviews.	PSC System Administrator PSC Planning Coordinator PSC Permits Management with Elevated Access
PSC Update Plan Review Comments Added by Self	Update plan review comments added by self.	PSC System Administrator PSC Plan Reviewer PSC Planning Coordinator PSC Manage Plan Review Cycles in Planning Applications All PSC Manage Plan Review Cycles in Planning Applications Self
PSC Update Plan Review Comments Added by Others and Self	Update plan review comments added by others and self.	PSC System Administrator PSC Planning and Zoning Application Administrator
PSC Delete Plan Review Comments Added by Self	Delete plan review comments added by self.	PSC System Administrator PSC Plan Reviewer PSC Planning Coordinator PSC Manage Plan Review Cycles in Planning Applications All

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Manage Plan Review Cycles in Planning Applications Self
PSC Delete Plan Review Comments Added by Others and Self	Delete plan review comments added by others and self.	PSC System Administrator PSC Planning and Zoning Application Administrator
PSC Add Documents to Plan Review Cycles	Add documents to plan review cycles for review by plan reviewers.	PSC System Administrator PSC Planning Coordinator
PSC Remove Documents from Plan Review Cycles	Remove documents from a plan review cycle.	PSC System Administrator PSC Planning Coordinator
PSC Add Reviewer to Permit Plan Review	Add reviewer to permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Remove Reviewer from Permit Plan Review	Remove reviewer from permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Update Plan Review Decision Status Assigned to Self	Update plan review decision status assigned to self.	PSC Plan Reviewer
PSC Update Plan Review Decision Status Assigned to Others and Self	Update plan review decision status assigned to others and self.	PSC System Administrator
PSC Manage Plan Review Cycles in Planning Applications Self	Manage plan review cycles in planning applications assigned to self.	PSC Associate Planner
PSC Override Status of Permit Plan Reviews	Override status of permit plan reviews.	PSC System Administrator PSC Planning Coordinator
PSC Cancel Cycle of Permit Plan Review	Cancel cycle of permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Add Session Cycle for Plan Review Cycles	Add a Bluebeam Studio™ Session for a plan review cycle for electronic document review.	PSC System Administrator PSC Planning Coordinator
PSC Update Session to Finalized for Plan Review Cycles	Update a Bluebeam Studio™ Session to finalized for a plan review cycle to close the cycle for document review.	PSC System Administrator PSC Planning Coordinator

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](#) guide.

## Plan Review Overview

Some applications require a plan review to evaluate the proposed project. The documentation is reviewed by all pertinent city departments to ensure compliance with applicable codes and regulations before permits are issued or for planning and zoning.

Plan reviews are tracked in Oracle Permitting and Licensing as part of permit and planning application workflow. Agency setup determines whether a plan review is required for a permit or planning application type. For more information, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Any review cycle for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™, an electronic document review tool.

**Note:** To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications.

This is what the steps for a plan review look like:

1. A registered public user submits a permit or planning application that requires review by agency staff.
2. A permit technician or assigned planner assigns a status to the transaction that requires a plan review. This triggers the automatic creation of the first plan review cycle. For more information, see [Using Workflow](#).
3. If configured by the agency, the system automatically assigns departments and reviewers to the first cycle of the plan review. The plan coordinator can also manually assign reviewers to a plan review cycle in the permit or planning application details, or on the Plan Review Console. See [Managing Plan Reviewers](#) and [Using the Plan Review Console](#).
4. The plan coordinator attaches documents, if any, to the plan review cycle from the application attachments. See [Managing Plan Review Documents](#).
5. When an integration with Bluebeam Studio™ exists, the plan coordinator can initiate an electronic Studio Session for the plan review cycle at any time until the review cycle is complete or continue with a manual review cycle. See [Working with Electronic Plan Reviews](#).
6. The assigned plan reviewers complete their review. See [Performing Plan Reviews](#).
7. The plan coordinator adds new plan review cycles and repeats the review process as necessary until the review is complete. See [Managing Plan Review Cycles](#).

Plan reviews can be created and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a pre-submittal or terminal status.

Permit statuses:

- Yes, you can create or update plan reviews for permits in these permit statuses: *About to Expire, Accepted, Delinquent, Expired, In Process, Inspection, Permit Issued, Plan Review, and Submitted*.
- No, you can't create or update plan reviews for permits in these permit statuses: *Certificate of Occupancy, Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn*.

Planning application statuses:

- Yes, you can create or update planning application plan reviews in these planning application statuses: *About to Expire, Application Accepted, Delinquent, Expired, Hearing, In Process, Plan Review, and Submitted.*
- No, you can't create or update planning application plan reviews in these planning application statuses: *Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn.*

## Plan Review Workflow

The plan review workflow for the plan coordinator appears on the Task Management page.

As a plan coordinator, you sort tasks by *Workflow*. For more information about workflow, see *Using Workflow*.

When the last reviewer provides a decision status for a plan review cycle, it is automatically closed. Upon closing, the overall review status changes to *Complete*. If a review cycle uses a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: *Rejected, Revision Required, Approved with Comments, Approved, and Not Required.*

Workflow is automatically moved forward to the next step when all of the following criteria are met:

- The current plan review cycle status is *Complete*.
- The plan review decision is *Approved, Approved with Comments, or Not Required*.
- The review cycle has been finalized, if a Bluebeam Studio™ Session was used.

If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

The workflow process definition must identify the plan review task and the action to take when auto-advancing. For more information, see *Using Custom Properties*.

## Plan Review Communications

For information about plan review communication events, such as when a plan review is finalized, completed, or canceled, see *Delivered Communication Events*. For information about sending communications when cycle or reviewer due dates are approaching, see *Setting Up Notifications for Plan Review Due Dates*.

# Managing Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a series of plan reviews for a permit or planning application completed by multiple reviewers.

You manage review cycles on the Plan Reviews page in the permit or planning application details. This topic discusses these review cycle tasks:

- Add plan review cycles.
- Add plan review due dates.
- Finalize or cancel plan review cycles.

- View the different plan review cycles.
- Record time for plan reviews.
- Access conditions of approvals for planning applications.

Your agency can conduct reviews that contain both manual cycles and electronic cycles using Bluebeam Studio™. For information about starting a Bluebeam Studio™ Session during a review cycle, see [Working with Electronic Plan Reviews](#).

To access the Plan Reviews page for a transaction:

1. Select the **Plan Reviews** tile on the Agency Springboard.
2. Select a plan review row on the **All Reviews**, **Open Reviews**, or **Unassigned Reviews** tabs.
3. In the navigation panel of the permit or planning application details, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.

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

## Adding Plan Review Cycles

The first cycle of a plan review is automatically created when a permit technician or assigned planner moves the transaction into *Plan Review* status. If you manually create a plan review cycle before the *Plan Review* status, the system won't automatically create the cycle. You add subsequent cycles until the plan review is complete.

Review cycles can be added and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a presubmittal or terminal status. For more information, see [Plan Review Overview](#).


1. On the Plan Reviews page, click the **Add Review Cycle** button to add a new plan review cycle.  
This button is available only when all other plan review cycles for the transaction are complete or canceled.
2. On the Add Plan Review page, edit or enter the review cycle name.  
If **Enable Default of Plan Review Name** is turned on for the agency, the default review cycle name is the name of the previous cycle. Otherwise, there is no default name. You can update the cycle name at any time on the Plan Review page.
3. Select **Copy reviewers from most recent cycle** if you want to copy the reviewers from the previous cycle, whether the previous cycle was manual or electronic.
4. If your agency integrates with Bluebeam Studio™, you have two additional options:
  - Click **Copy Documents** to copy documents from the previous cycle if the cycle was electronic.
  - Click **Create Studio Session** to start a Bluebeam Studio™ Session, which makes the new cycle electronic.  
You can also start a Studio Session later, while the review cycle is in progress. For more information about working with an electronic plan review cycle, see [Working with Electronic Plan Reviews](#).
5. Click the **Add** button.


Depending on your agency's plan review setup, plan review cycle and reviewer department due dates may be generated. Due dates may be automatically generated when a plan review is manually added or a first plan review cycle is automatically created.

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

## Automatically Adding Plan Review Due Dates

Agencies can configure the plan review system to automatically calculate cycle and plan reviewer department due dates for a permit or planning application type. The due dates are populated on the Plan Reviews page in the application details and on the Plan Reviews console page when a plan review is created. The generated due dates can also be manually updated.

An **Overdue** icon appears next to due dates that are past due: 

A **Reviewer Due Date After Cycle Due Date** clock icon appears for reviewer due dates that have been configured to be after the cycle due date: 

Due dates are calculated using time rules and time policies set up by your agency. Time rules can be leveraged to define the maximum review time for first or subsequent reviews as well as due dates based on plan reviewer department turnaround times. You associate the time rules with the permit type or planning application type so that different application types can have different due dates. For more information about using time rules to calculate due dates, see [Setting Up Plan Review Due Dates](#).

If there are no time rules but the agency has turned on the **Enable Cascading Cycle Due Date** switch for permit or planning application plan reviews, then the system uses the cycle due date that you enter to fill in for the reviewer due dates that are blank.

For more information on agency-level plan review options for permits and planning applications, including cascading cycle due dates, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#).

## Manually Adding Plan Review Due Dates

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

If the **Enable Cascading Cycle Due Date** switch is turned on for the agency, then the system uses the cycle due date that you enter to fill in any reviewer due dates that are blank. However, if there are time rules defined for the application type to automatically add plan review due dates, the time rules are used to calculate the plan review due dates instead. If there are no time rules, then the cascading due date applies.

You can set up the system to send communications when cycle or reviewer due dates are approaching. For more information, see [Setting Up Notifications for Plan Review Due Dates](#).

## Finalizing or Canceling Plan Review Cycles

On the Plan Reviews page of an electronic plan review cycle, click the **Finalize Review Cycle** button when all of the review decisions have been provided and the cycle is still active. At this point, the electronic plan review cycle status is Complete. After you finalize the cycle, marked up documents copied back from the Bluebeam Studio™ Session can't be edited. For more information, see [Working with Electronic Plan Reviews](#) and [Managing Plan Review Documents](#).

Click the **Cancel Review Cycle** button to cancel a manual or electronic plan review cycle that is active. This button is available when a manual plan review cycle has a status of *In Progress* or until an electronic plan review has been finalized.

Your agency may require comments for review cycle cancellations.



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

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

## Viewing the Different Plan Review Cycles

You can switch between plan review cycles to view details for each cycle, including the **Reviewers** and **Documents** grids.

1. Click the **Switch Cycle** link in the plan review header details.  
This link is available only when there are two or more plan review cycles.
2. On the Switch Cycle page, click the **Select** button for the cycle you would like to view.  
The refreshed page shows the cycle header details and reviewers for the selected cycle.

## Recording Time for Plan Reviews

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

## Accessing Conditions of Approval for Planning Applications

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

## Using the Plan Review Console









Accessible from the Plan Reviews tile on the agency springboard, the Plan Reviews console page provides centralized views for managing your agency's plan reviews. All agency staff can view plan reviews in the console and navigate to the permit or planning application's plan review details by clicking a plan review row. Plan coordinators can assign and reassign plan reviews depending on their job role configuration.

The Plan Reviews console page comprises these pages:

- Plan Reviews - All Reviews page
- Plan Reviews - Open Reviews page
- Plan Reviews - Unassigned Reviews page
- Plan Reviews - Pending Reviews page
- Plan Reviews - Reviewer Workload page

Your agency configures which plan coordinators can assign reviewers in the plan review console on the Open Reviews, Unassigned Reviews, and Reviewer Workload pages. Plan coordinators can make assignments based on their job attributes for application type and department set up by the agency; they can assign to all departments or all application types when the job attributes for the job function are set to blank. For more information on defining these job attributes, see [Setting Up Agency Staff](#).

In addition to summary plan review information on each page, icons are used to provide additional details about the transaction or plan review. You can also select actions from the **Actions** menu.

Page Element	Description
	<p>Indicates the column that shows condition icons when a grid is displayed in the expanded format.</p> <p>For more information about conditions placed on permits or planning applications, see <a href="#">Applying Conditions to Applications</a>.</p>
 Lock   Hold   Notice	<p>Appears in the transaction row to indicate that one or more conditions have been applied to the transaction. The icon for the most severe condition is displayed. Click the icon to view condition information. See also <a href="#">Setting Up Conditions</a>.</p>
	<p>Indicates an electronic plan review cycle with a Bluebeam Studio™ Session.</p>
	<p>Indicates that fees are due for the transaction. Click the <b>Fees Due</b> icon to view more details.</p>
	<p>Indicates that an applicant has uploaded a PDF document to a permit or planning application that's in a plan review status.</p> <p>Click to open the Uploaded Documents page, where uploaded documents can be previewed.</p>
	<p>Click the <b>Actions</b> menu button for a permit or planning application to see the actions menu, where you can select an available action:</p> <ul style="list-style-type: none"> <li>• <b>Add Cycle Comments</b> - Add a cycle-level comment to the current plan review cycle for a permit or planning application that's in progress and view existing cycle comments. You can add, update, or delete cycle-level comments for plan reviews in any cycle status until the application is closed.</li> <li>• <b>View Plan Comments</b> - Review a list of consolidated plan comments for the permit or planning application.</li> <li>• <b>View Cycle History</b> - Review cycle and reviewer statuses and decisions across all cycles as well as reviewer due dates and the length of time a cycle was open.</li> </ul>

**Note:** For information about expanded and condensed grid formats and common grid controls, see [Using Grids](#) and [Personalizing Grid Displays](#).

## All Reviews

The All Reviews page displays in-progress plan review cycles by assigned department and reviewer. Each plan review listed includes transaction, property, reviewer, and cycle information.

This example illustrates the Plan Reviews - All Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field. The date filters are configured for all date types in a specified date range, and the **My Job** switch is turned on.

### Plan Reviews

Department	Application	Application Type	Application Status	City	Description	Reviewer	Reviewer Due	Reviewer Decision	Decision Date	Cycle	Cycle Created	Cycle Status	Actions
Building	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Building	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	

These switches are available to filter the plan reviews displayed on the page:

Page Element	Description
<b>My Job</b>	For plan coordinators or plan reviewers, view only plan reviews that match with the application types and departments assigned to you in your respective job role definitions.

Page Element	Description
<b>Show All Application Statuses</b>	View the plan reviews for applications that are in a final status—including <i>Completed</i> , <i>Certificate of Occupancy</i> , <i>Void</i> , <i>Withdrawn</i> , or <i>Denied</i> —in addition to the other statuses.
<b>Show All Cycles</b>	View all review cycles, including the closed review cycles for the permit and planning applications.

You can also use a variety of date filters to view the plan reviews. Your agency can choose the default values for the date type and time period fields in the agency-level setup options. See [Setting Up Agencies](#).

Select a value in the date type drop-down list:

- *Cycle Due* - The date when the plan review cycle is scheduled to be completed.
- *Cycle Created* - The date when the plan review cycle was created.
- *Reviewer Due* - The date by which the plan reviewer must provide a decision.
- *Reviewer Decision* - The date when the plan reviewer provided a decision.
- *Cycle Decision* - The date when the cycle decision was provided.
- *All Dates* - All date types.

Then select a value for the time period from the drop-down list:

- *Today*
- *Yesterday*
- *Tomorrow*
- *Last 14 Days or Next 14 Days*
- *Last 30 Days or Next 30 Days*
- *Date Range* - Enter start and end dates in the provided fields when you select this option. (An agency-level default can't be set up for this option.)

Click a cycle row to open the application's Plan Reviews page.

## Open Reviews

Plan coordinators can see a list of plan reviews that don't have a cycle decision yet on the Open Reviews page.

This example illustrates the Plan Reviews - Open Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews   **Open Reviews**   Unassigned Reviews   Pending Reviews   Reviewer Workload

My Job   Search

Cycle	Cycle Due	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions																														
1	4/21/22	ELEC-2022-00028	Electrical	Plan Review	4/7/22	Walnut Street	ALAMEDA	Electrical for an added kitchen island.	⋮																														
<table border="1"> <thead> <tr> <th>Department</th> <th>Reviewer</th> <th>Assigned Date</th> <th>Due Date</th> <th>Decision</th> <th>Decision Date</th> </tr> </thead> <tbody> <tr> <td>Electrical</td> <td>Betsy King</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Building</td> <td>Lynn Hill</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Fire Protection</td> <td>Tom Gray</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Utilities</td> <td></td> <td></td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> </tbody> </table>										Department	Reviewer	Assigned Date	Due Date	Decision	Decision Date	Electrical	Betsy King	4/7/22	4/21/22		>	Building	Lynn Hill	4/7/22	4/21/22		>	Fire Protection	Tom Gray	4/7/22	4/21/22		>	Utilities			4/21/22		>
Department	Reviewer	Assigned Date	Due Date	Decision	Decision Date																																		
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Building	Lynn Hill	4/7/22	4/21/22		>																																		
Fire Protection	Tom Gray	4/7/22	4/21/22		>																																		
Utilities			4/21/22		>																																		
▶	1	ELEC-2022-00023	Electrical	Submitted	3/15/22			Install 60A dedicated circuit for tesla charger w/charger install. Carbon monoxide & Smoke ...	⋮																														
▶	1	ELEC-2022-00024	Electrical	Inspection	3/28/22	Clement Avenue	ALAMEDA	Submitting application for electrical plan	⋮																														
▶	1	RESADD-2022-00028	Residential Addition	Inspection	3/31/22	Walnut Street	ALAMEDA	Need to expand the living room of our home by 1250 Sq.ft	⋮																														

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

The row for each plan review cycle displays cycle, application, and property information. Each cycle row expands to show the departments and reviewers assigned to the cycle, reviewer assigned and due dates, reviewer decision, and decision date. You can select the reviewer row to add or change the assigned reviewer depending on your Plan Coordinator job role configuration for application type and department. In the reviewer details, the reviewer drop-down list displays the available reviewers and a count of plan reviews assigned to each of them. The reviewer due date can also be updated.

Click a cycle row to open the application's Plan Reviews page.

## Unassigned Reviews

On the Unassigned Reviews page, you can view:

- Plan review cycles with one or more departments that have no reviewer assigned.
- Required departments that aren't in the cycle.

This example illustrates the Plan Reviews - Unassigned Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews    Open Reviews    Unassigned Reviews    Pending Reviews    Reviewer Workload

My Job    Search

Application	Plan Review Name	Cycle	Cycle Due	Department	Application Type	Description	Property	City	Actions
ELEC-2022-00058	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA	
ELEC-2022-00059	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA	
MECH-2022-00026	Residential Mechanical	1	10/5/22	Building, Engineering, Fire Protection	Residential Mechanical	Single family residence.	1719 St. Charles Street	ALAMEDA	

Each row displays the transaction ID, cycle name and number, cycle due date, unassigned department, application type, and property.

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types and departments that match the application types and departments assigned to you in your job role configuration.

Plan coordinators can click the **Assign** icon for a plan review to open the Add Reviewers page: . The **Assign** icon is only available when the plan coordinator's job attributes for application type and department match the plan review's application type and department.

The tabs on the Add Reviewers page list plan reviewers that are associated with the property's plan review district, if there's a district associated with the parcel, and all reviewers. You can filter reviewers by department and assign reviewers to the cycle. You can also view the reviewer workload in a calendar view, featuring a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.

For more information about assigning reviewers, see [Managing Plan Reviewers](#).

## Pending Reviews

The Pending Reviews page helps agency staff manage plan reviews with revised documents or waiting for revised documents. Permits and planning applications appear in the pending reviews list when:

- The application is in a plan review status and the applicant has uploaded a PDF document.  
Applications in a plan review status again after the plan was approved, approved with comments, or not required also appear in the list.
- The last plan review cycle was completed with a decision of *Rejected* or *Revision Required*.

This example illustrates the Plan Reviews - Pending Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews   Open Reviews   Unassigned Reviews   **Pending Reviews**   Reviewer Workload

My Job   Search

Decision	Decision Date	Review Name	Cycle	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions
Rejected	4/11/22	Mechanical	1	MECH-2022-00008	Mechanical	Plan Review	4/10/22	Walnut Street	ALAMEDA	Mechanical	<input type="button" value="⋮"/>

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

When an applicant adds a PDF document to the permit or planning application, an Uploaded Documents icon appears on the permit or planning application row in the pending reviews list as shown in this example. Click the icon to open the Uploaded Documents page where you can preview the file and mark the document as seen.

Click the application row to open the application's Plan Reviews page, where you can create a new cycle and add revised documents to the cycle. For more about working with revised documents, see [Managing Plan Review Documents](#).


## Reviewer Workload



The Reviewer Workload page displays a list of reviewers based on the plan coordinator's assigned plan reviewer departments and application types in the agency staff job attributes. Two views, the grid view and the calendar view, provide reviewer workload information to help manage reviewer assignments. The grid view provides counts of assigned and overdue plan reviews for each reviewer as well as application and plan review details. The calendar view displays a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.






















This example illustrates the grid view of the Plan Reviews - Reviewer Workload page in the console.

Plan Reviews

[All Reviews](#)
[Open Reviews](#)
[Unassigned Reviews](#)
[Pending Reviews](#)
[Reviewer Workload](#)



Reviewer	Review Count	Overdue																								
▶ Betsy King	2																									
▲ Gerald Eckhart	1																									
<table border="1"> <thead> <tr> <th>Application</th> <th>Property</th> <th>Description</th> <th>Department</th> <th>Cycle</th> <th>Overdue</th> <th>Due Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>ELEC-2022-00023 Electrical Submitted</td> <td></td> <td>Install 60A dedicated circuit for tesla charger w/charger instal. Carbon monoxide &amp; Smoke alarms required.</td> <td>Building</td> <td>1</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Application	Property	Description	Department	Cycle	Overdue	Due Date		ELEC-2022-00023 Electrical Submitted		Install 60A dedicated circuit for tesla charger w/charger instal. Carbon monoxide & Smoke alarms required.	Building	1											
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Application	Property	Description	Department	Cycle	Overdue	Due Date																				
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 ELEC-2022-00028 Electrical Plan Review	1217 Walnut Street ALAMEDA	Electrical for an added kitchen island.	Fire Protection	1		4/21/22																				

Here are descriptions of the columns displayed on the Reviewer Workload page:

- **Reviewer:** Displays the reviewer name. Click the reviewer name to expand a section that displays application and plan review information. Click a row to open the application's Plan Reviews page.

Depending on your Plan Coordinator job role configuration for application type and department, you can click the **Assign** icon for a plan review to display the Reviewer Details modal page. The list of available reviewers that

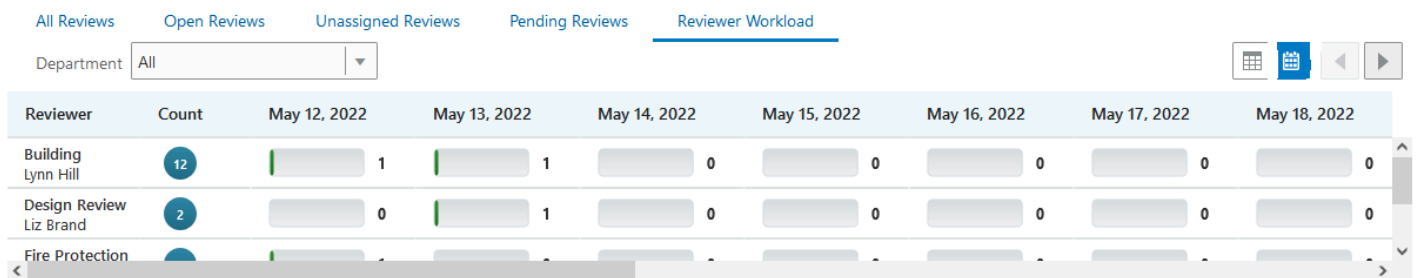


can be assigned includes the total number of plan reviews assigned to each reviewer. Select a reviewer and a review due date.

- **Review Count:** Displays the number of reviews assigned to a reviewer.
- **Overdue:** Displays the number of reviews that are overdue.

This example illustrates the calendar view of the Plan Reviews - Reviewer Workload page in the console.

## Plan Reviews



The **Count** badge displays the total count for each reviewer-department combination and you can hover over the badge to see the overdue count. The daily count is shown in the graph.

For more information about assigning and reassigning plan reviews to manage reviewer workload, see [Managing Plan Reviewers](#).

## Working with Electronic Plan Reviews

Your agency can conduct plan reviews that contain electronic plan review cycles.

Review cycles for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™, an electronic document review tool. When you start a Bluebeam Studio™ Session, the plan review cycle is considered electronic. The next cycle can be manual or electronic. You can start a Studio Session when you add a new plan review cycle or at any time during a review cycle until the cycle is complete.

**Note:** To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications. For the integration to work, add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ Prime portal.

Depending on your agency's protected document handling for permit and planning applications, you may be able to use archived-protected PDF documents in electronic plan reviews. For more information about the agency setup, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#). For information about working with protected documents in plan reviews, see [Managing Plan Review Documents](#).

Here are the basic steps for conducting electronic plan reviews:

1. Click **Create Studio Session** on the Add Plan Review page while adding a new plan review cycle or click **Create Studio Session** on the Plan Review page for the review cycle you're working with.
2. Click **Add Reviewers** to add reviewers.  
Reviewers already in the cycle are automatically added to the session. You can also add reviewers during the Studio Session, but you can't delete them. You must add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ Prime portal before adding the reviewers to the review.  
For more information, see *Managing Plan Reviewers*.
3. Click **Add Documents** to add plan review documents.  
Documents already in the cycle are automatically added to the session. You can also add or delete documents during the Studio Session.  
For more information, see *Managing Plan Review Documents*.
4. Mark up documents in Bluebeam Studio™.  
If you're viewing a marked-up document copied from a previous cycle, Bluebeam Studio™ allows you to compare prior cycle markups side by side.  
When a document is copied back to the review cycle, the state in the Documents grid is *Marked Up*.
5. When all reviewers have provided a decision, the **Finalize Review Cycle** button is enabled. Click **Finalize Review Cycle** to complete an electronic cycle. For more information, see *Managing Plan Review Cycles*.  
During the finalization process, the marked up documents are copied back from Bluebeam Studio™. Documents marked up by reviewers are saved in the plan review documents grid and in the permit attachments; they can be viewed but not edited further. The documents can be copied into the next plan review cycle.

## Manually Closing an Electronic Review Cycle

Plan coordinators can use the **Close Cycle** button on the Plan Reviews page to manually close an electronic review cycle when a Bluebeam Studio™ Session can't be finalized after clicking the **Finalize Review Cycle** button. You can try clicking **Finalize Review Cycle** again in case the connection issues are temporary, but if the error can't be resolved, there may be a document in the Bluebeam Studio™ Session that couldn't be edited. Click **Close Cycle** so that the cycle is considered complete and workflow can advance. You may need to manually retrieve PDF documents that were uploaded to Bluebeam Studio.

The **Cycle Issues** section displays information about documents that the system couldn't copy back to the attachments from Bluebeam Studio™. For example, when the system can't retrieve edit-protected documents that were added to a Bluebeam Studio™ Session, the documents are listed in the cycle issues.

## Managing Plan Reviewers

After creating a plan review cycle, you can manually add plan reviewers on the Plan Reviews page for a permit or planning application. Depending on agency configuration, the system can also automatically assign reviewers and add departmental due dates.

For information about manually assigning reviewers in the Plan Reviews console page, see *Using the Plan Review Console*.

For information about overriding a plan reviewer decision, see [Performing Plan Reviews](#).


## Using Automatic Assignment


If **Enable Auto Assignment** is selected in the transaction type settings, a reviewer row is automatically added to the plan review cycle for each required plan reviewer department selected for the transaction type. For more information about plan review settings for automatic assignment and required plan reviewer departments, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Additionally, the department lead for each department is automatically assigned as the reviewer. For information about defining a department lead, see [Setting Up Plan Reviewer Departments](#).

## Using Automatic Department Due Dates

If time rules are associated with required plan reviewer departments in the permit or planning application type definition, departmental due dates are automatically added to the **Reviewers** grid when a plan review is created. You can manually assign reviewers and update the due dates.

An **Overdue** icon appears next to due dates that are past due: 

A **Reviewer Due Date After Cycle Due Date** clock icon appears for reviewer due dates that have been configured to be after the cycle due date: 

For more information about plan review settings for automatically adding due dates, see [Setting Up Plan Review Due Dates](#).

## Manually Adding Reviewers to Plan Reviews

When your agency requires plan review departments for the transaction type associated with the transaction, those departments are displayed above the **Reviewers** grid. When you add a reviewer from a required department to the plan review cycle, that department no longer appears.

You can start a Bluebeam Studio™ Session at any time and the reviewers in the **Reviewers** grid will be automatically added to the Studio Session. If you add more reviewers while the Studio Session is in progress, they'll be added to the Studio Session, too. For the integration to work, you must add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ Prime portal before adding the reviewers to the review.

Reviewers are available to add only when they have a transaction type job attribute that matches the transaction type of the transaction. For more information on assigning job attributes, see [Setting Up Agency Staff](#).

1. On the Plan Reviews page in the transaction details, click the **Add Reviewers** button.

In addition to the Add Reviewers page that you access from the application's Plan Reviews page, you can add reviewers on three pages in the Plan Review Console: Open Reviews, Unassigned Reviews, and Reviewer Workload. See [Using the Plan Review Console](#).

The Add Reviewers modal page displays available district reviewers and all available reviewers by department on separate tabs.

- o **District Reviewers**

If the parcel or address for the transaction is associated with a plan review district, the reviewers that have the matching plan review district job attribute are available on the District Reviewers tab. The tab is only available if a plan review district is assigned to the transaction.

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

- o **All Reviewers**

Select the All Reviewers tab to view all reviewers regardless of which plan review district is assigned to them. Reviewers not assigned to a district are also displayed.

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

- o **Reviewer Workload**

Use the Reviewer Workload tab to select reviewers and assigned departments and view the daily number of assigned reviews in a calendar. A badge next to each name displays the total number of reviews assigned to the reviewer. The bars indicate the number of reviews that are due each day.

You can filter the available reviewers by department. For more information on plan reviewer departments, see [Setting Up Plan Reviewer Departments](#).

2. Select the check box next to each reviewer that you want to add.

The reviewers selected to be assigned appear on the Selections tab, which displays the number of selected reviewers in the tab title.

3. Click **Save**.

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

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

## Removing Reviewers from Plan Reviews

As a plan coordinator, you can remove or delete plan reviewers from a plan review cycle on the Plan Reviews page unless a Bluebeam Studio™ Session is in progress.

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

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

You can't delete a reviewer when:

- The reviewer has added comments or entered a decision.
- A Studio Session is in progress.

However, you can change the assigned reviewer to another reviewer or manually change the decision to *Not Required* on the Plan Review Decision Details page.

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

## Changing the Reviewer Assigned to a Plan Review

An agency's plan coordinator can change the reviewer assigned to a plan review on the Plan Review Decision Details page while the review is still in progress.

1. In the **Reviewers** grid on the Plan Reviews page, click the **View More Details** button for the selected plan reviewer.
2. On the Plan Review Decision Details page, select a name from the **Reviewer** drop-down list. The list displays the available reviewers and a count of plan reviews assigned to each of them.

You can also reassign plan reviews in the Plan Reviews console:

- Open Reviews page: Expand the cycle row and click the reviewer row to open the Reviewer Details modal page.
- Reviewer Workload page: Expand the reviewer row and click the **Assign** icon for a plan review to open the Reviewer Details modal page.

On the Reviewer Details page, select a name from the Reviewer drop-down list. The list displays the available reviewers and a count of plan reviews assigned to each of them.

## Managing Plan Review Documents

Agency staff can add and remove plan review documents on the Plan Reviews page for a permit or planning application. Documents can be added and removed during both manual and electronic cycles. This topic also describes working with protected documents and revised documents provided by applicants.

### Adding Documents to a Plan Review

Documents can be added during both manual and electronic cycles until the cycle is completed, even if some reviewers have provided a decision.

Documents added to a plan review cycle are automatically added to a Bluebeam Studio™ Session that is already in progress. Documents can also be deleted when a Studio Session is in progress. If a document fails to upload to Bluebeam Studio™ or if the upload status is *No*, you can use the **Retry** button to initiate the upload process again. For more information, see *Working with Electronic Plan Reviews*.

1. On the Plan Reviews page in the transaction details, click the **Add Documents** button.
2. On the Add Documents page, select the documents that you want to attach to the plan review cycle. The list displays PDF documents on the application's Attachments page that haven't been added to the plan review yet.

Page Element	Description
<b>Protected</b>	Displays shield icons that indicate whether the document is a protected PDF file. See the "Working with Protected Documents" section in this topic for more information.
<b>File Name</b>	Displays the file name, file size, who uploaded the file, and when it was uploaded into the system.
<b>Description</b>	Displays the description that was entered when the file was uploaded into the system.
<b>Category/Subcategory</b>	Displays the category and subcategory that were entered when the file was uploaded into the system.

3. Click **Save**.

The documents that you selected appear in the **Documents** section.

Page Element	Description
<b>Processing</b>	Displays the progress of files being transferred to or from Bluebeam Studio™ in an electronic plan review cycle. Indicators for each document display which documents have completed the transfer (check mark), which documents are in process (processing icon), and documents with transfer errors (alert icon).  Documents that the system couldn't retrieve when the cycle is finalized are listed in the <b>Cycle Issues</b> section on the Plan Reviews page.
<b>Protected</b>	Displays shield icons that indicate whether the document is a protected PDF file. See the "Working with Protected Documents" section in this topic for more information.
<b>File Name</b>	Displays the file name.
<b>Description</b>	Displays the description that was entered when the file was uploaded into the system.
<b>State</b>	Displays the state of the document as follows: <ul style="list-style-type: none"> <li>• <i>Initial</i> - Displayed when the document is added to the cycle.</li> <li>• <i>Resubmitted</i> - Displayed when a document with the same name is added to the cycle. Applicants typically upload a revision to the plan review documents after a plan review cycle was rejected or</li> </ul>

Page Element	Description
	<p>required revisions. Revised documents should be uploaded with the same file name. Once they are added, they are considered <i>Resubmitted</i>.</p> <ul style="list-style-type: none"> <li>• <b>Marked Up</b> - Displayed when a document that is marked up in Bluebeam Studio™ Session is copied back to the cycle and the Attachments page in the application details. Once the electronic plan review cycle is finalized, the marked up documents in the <b>Documents</b> section can't be edited further.</li> </ul>
<b>Date</b>	Displays the date and time when a document was added to the plan review cycle.

## Working with Protected Documents


A protected PDF document has any setting that is restrictive or is otherwise secured. There are different ways that your agency can handle protected documents in their Oracle Permitting and Licensing system for permit and planning applications:



- **Protected documents are allowed.** You can upload them to an application form or in the application details but if you add them to an electronic plan review, they're not editable in Bluebeam Studio™ and can't be copied back to the application attachments when the session is finalized. Manual plan reviews can be conducted with protected documents.
- **Protected documents are blocked.** You are prevented from uploading them to an application form or in the application details. If there were protected documents in the system when your agency turned on this option, they can be added to manual and electronic plan reviews but aren't editable in Bluebeam Studio™.
- **Protections are removed.** When you add archive-protected documents to an electronic plan review, the system creates an editable copy without protections for use in the Bluebeam Studio™ Session. Reviewers can mark up the editable version of the document in the session and the system can copy it back to the application attachments. Edit-protected documents can't be marked up in Bluebeam Studio™ and can't be copied back. Manual plan reviews can be conducted with protected documents.

**Note:** Regardless of the protected documents setting your agency chooses, the system will always prevent you from uploading in an application password-protected documents that require a password to open.

For more information about agency options for setting up protected document handling, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#).

Icons help identify protected documents on the Attachments page in application forms and after submittal in the application details. If the agency setup allows protected documents to be uploaded, the system displays a shield icon next to the protected document.

Shield Icons for Protected Documents	Description
	<p>The <b>Edit Protected Document</b> shield icon is displayed in the attachments on the application intake form and after submittal in the application details when a protected PDF document is uploaded.</p> <p>Protected documents are shown with this icon in the list of plan review documents as well; they can be used in electronic plan reviews but won't be editable or copied back from Bluebeam Studio™.</p> <p>Marked-up documents that are copied back from Bluebeam Studio™ also display this icon, which means that they can't be edited further.</p>

Shield Icons for Protected Documents	Description
	The <b>Archive Protected Document</b> shield outline icon indicates an archived PDF document.
	<p>The <b>Archive Protected or Protected Editable Document</b> solid shield icon appears for archive protected documents and protected documents that are editable. This icon appears for documents that were added before agencies implemented one of the document protection handling options described in this section.</p> <p>Documents with this icon can be used in an electronic plan review but will only be copied back from Bluebeam Studio™ depending on the document's protection and the agency's protected document setting. Protected PDF documents won't be copied back unless it's a protection that will allow Bluebeam Studio™ to copy it back.</p>
No shield icon	The <b>Protected</b> column is blank for documents without any protection settings or that have protection settings that are allowed in Bluebeam Studio™, such as print protection.

The **Cycle Issues** section displays information about protected PDF documents that the system couldn't copy back to the attachments during an electronic plan review cycle. For example, when the system can't retrieve edit-protected PDF documents that were added to a Bluebeam Studio™ Session, the documents are listed in the cycle issues.

## Working with Revised Documents

Applicants upload revised documents to the Attachments page in their permit or planning applications when requested by agency staff. An **Uploaded Documents** icon indicates that a PDF file has been uploaded to an application with a *Plan Review* status. You'll see the icon on pages in the Plan Review Console as well as on the Attachments page in the application details.

When plan coordinators are waiting for a revised document, they can use the Pending Reviews page in the Plan Review Console to check whether an uploaded document is a revision. For more information, see [Using the Plan Review Console](#).

Here's how to manage a revised plan review document:

1. When the applicant adds a PDF document to the permit or planning application, an **Uploaded Documents** icon appears on the permit or planning application row in the Plan Review Console.
2. Click the icon to open the Uploaded Documents page.
3. You can click the PDF preview icon or thumbnail image to help identify the documents.
4. You can also clear the uploaded documents indicator by clicking **Mark as Seen**, if desired.
5. Click the **Close** icon on the modal page to return to the Pending Reviews page.
6. Click the permit or planning application row to open the application's Plan Reviews page.
7. Create a new cycle and add the revised document to the cycle.

After a revised document is added to a cycle, the **Uploaded Documents** icon is automatically cleared.

## Performing Plan Reviews

Plan reviewers perform reviews of documents and enter their decisions. In some cases, the agency's plan coordinator overrides a plan reviewer's existing decision.



As a plan reviewer, you view a list of plans assigned to you on the Task Management page and provide your plan review decision and comments on the Plan Review Decision Details page.

The plan coordinator can also enter override decisions, change reviewer due dates, and reassign reviewers on the Plan Review Decision Details page. A count of assigned plan reviews appears for each available reviewer in the Reviewer drop-down list.

This example shows the Plan Review Decision Details page.

Reviewers and plan coordinators can provide decisions whether or not documents are identified for a cycle.

Once all reviewers have provided a decision for a review cycle with a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

The system derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status. The system-defined decision statuses from most to least severe are: *Rejected*, *Revision Required*, *Approved with Comments*, *Approved*, and *Not Required*. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

## Viewing Plan Reviews Assigned to You

As a plan reviewer, you can find the plan reviews assigned to you on the Task Management page.

1. Select **Worklist** on the agency springboard.
2. The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type. Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Review Decision Details page, or by clicking the **Copy Plan Review Cycle Due Date to Plan Reviewers** button on the Plan Reviews page. You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.
3. Plan review assignments appear in the task grid. Click the **View More Details** button for a transaction to open the Plan Reviews page.

**Note:** All plan reviews that are assigned to you, including both manual and electronic document reviews, appear on this page.

The plan review workflow tasks for plan coordinators also appear on the Task Management page. Plan coordinators sort tasks by *Workflow*.

For more information on the Task Management page, see *Managing Tasks*.

## Adding a Plan Review Decision

As a plan reviewer, you can add your plan review decision on the Plan Review Decision Details page. You can modify your decision until the plan review cycle is closed or canceled, but you can't modify your decision if the plan coordinator overrides your decision.

1. Select **Permits** or **Planning Applications** on the agency springboard.
2. Select the transaction that you want to update with your plan review decision.
3. In the navigation panel, select **Permit Information > Plan Reviews** or **Planning Application > Plan Reviews**.
4. In the **Reviewers** grid, click the **View More Details** button for your row.
5. On the Plan Review Decision Details page, select a value from the **Decision** list.

If your agency is using the system-defined decision statuses, you'll see these options:

- *Approved*
- *Approved with Comments*
- *Revision Required*
- *Rejected*
- *Not Required*

The decision status names in the **Decision** list may not match the system status names, however, because displayed statuses can be modified by the agency for permit and planning application plan reviews. For example, if the agency changes the displayed status of *Rejected* for a permit plan review, you might see *Declined* or *Failed*. However, the severity of the decision remains the same. Any displayed status associated with the system status *Rejected*, for example, is always calculated as the most severe status.

For more information about agency setup for displaying separate permit and planning application decision statuses, see *Setting Up Plan Review Statuses*.

6. Click **Add Comments** to enter comments for your review.

Comments are optional unless your agency elects to require comments. Your agency may require comments for decisions with a negative or qualified outcome (*Approved with Comments*, *Rejected*, or *Revision Required*) or all decisions.

You can't edit your comments once the plan review cycle or transaction is closed or canceled.

7. Click the **Save** button.

The system updates the **Decision Date** field with a timestamp.

## Overriding Plan Reviewer Decisions

An agency's plan coordinator can override a plan reviewer's existing decision but can't change decisions. When a plan coordinator overrides a decision, the decision status and timestamp appear in the **Reviewers** grid in the reviewer's row.

As a plan coordinator, you can override the individual plan reviewer's decision on the Plan Review Decision Details page.

1. Select the **Plan Reviews** tile on the Agency Springboard.
2. Click the Open Reviews tab in the Plan Review Console.
3. Select a plan review cycle.
4. In the **Reviewers** grid on the Plan Reviews page in the transaction details, click the **View More Details** button for the selected plan reviewer.
5. On the Plan Review Decision Details page, select a value from the **Override Decision** list.

You can select from these decisions:

- *Approved*
- *Approved with Comments*
- *Revision Required*
- *Rejected*
- *Not Required*

6. Click **Add Comments** to enter comments for the override decision.

Comments are optional unless your agency elects to require comments. Your agency may require comments for decisions with a negative or qualified outcome (*Approved with Comments*, *Rejected*, or *Revision Required*) or all decisions.

You can't edit your comments once the plan review cycle or transaction is closed or canceled.

7. Click the **Save** button.

The system updates the plan reviewer's **Decision Date** timestamp and enters *Yes* in the **Override** field.

**Note:** If the plan coordinator overrides the last review in the plan review cycle, the override action changes the status of the plan review cycle to complete.

## Managing Plan Review Comments

Comments can be added and are sometimes required when providing plan review decisions or at the review cycle level. Plan coordinators and plan reviewers can also update and delete their own cycle-level and reviewer-level comments.

Your agency may require comments for review cycle cancellations and decisions with a negative or qualified outcome (*Approved with Comments*, *Rejected*, or *Revision Required*) or all decisions and cancellations. Comments are optional unless the agency elects to require comments.

Here's how you can manage plan review comments.

### Cycle-Level Comments

Plan coordinators and plan reviewers can add comments at the review cycle level:

Click **Add Comment** at the bottom of the Plan Reviews page to enter a comment.

All of the comments entered for the review cycle appear on the Plan Reviews page below the **Add Comment** button.

Plan coordinators and plan reviewers can also update and delete their own cycle-level comments. Click the comment row to open the Comment details page. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can add, update, or delete cycle-level comments for plan reviews in any cycle status until the application is closed.

## Reviewer-Level Comments

Plan reviewers can add decision comments to their own plan reviews. Plan coordinators can add decision comments for plan reviews assigned to any reviewer:

Click **Add Comments** at the bottom of the Plan Review Decision Details page to enter comments for your review or override decision. For more information, see [Performing Plan Reviews](#).

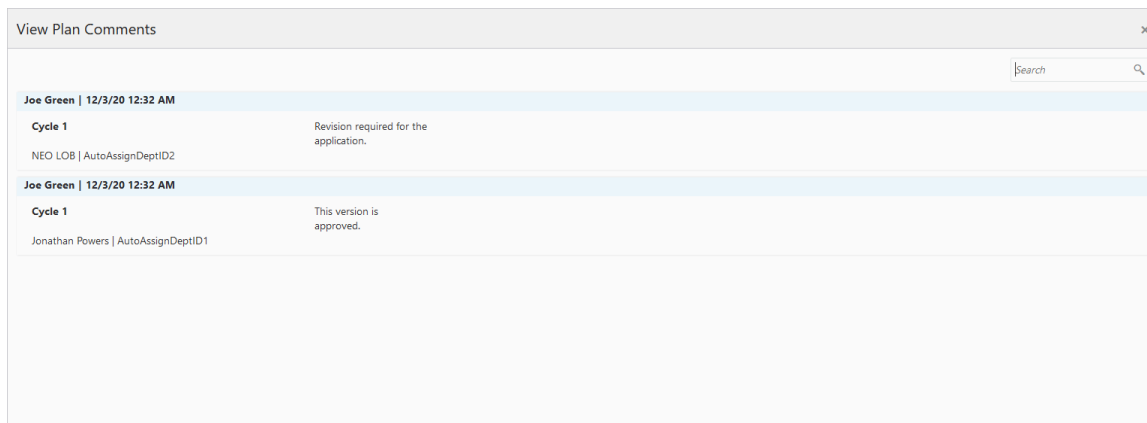
Plan coordinators and plan reviewers can also update and delete their own reviewer-level comments. Click the comment row on the Plan Review Decision Details page to open the Comment details page. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can't update or delete comments once the plan review cycle or transaction is closed or canceled.

## All Comments

Plan coordinators, plan reviewers, and applicants can view all comments entered for all cycles of a plan review:

Click the **View Plan Comments** link at the top of the transaction's Plan Reviews page.

This example shows the View Plan Comments page.



The View Plan Comments page displays all of the comments entered for a plan review by all participants during every review cycle. Applicants can't see the plan reviewer names. The comments listed on this page are searchable.

# 9 Managing Projects

## Security Details for Managing Projects

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Projects Inquiry	View public sector projects.	All users including users without login
PSC Project Management	Manage projects to which the user is assigned as the project manager.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Project Administration	Manage all projects.	PSC Planning and Zoning Application Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Chief Building Officer PSC Building Inspector PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permits Application Administrator PSC Permit Technician
PSC View Public Sector Project Attachments	View public sector project attachments.	PSC System Administrator PSC Registered Public User PSC Principal Planner

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Planning Coordinator PSC Plan Reviewer
PSC Update Public Sector Project Attachments added by Others and Self	Update public sector project attachments added by others and themselves.	PSC System Administrator
PSC Update Public Sector Project Attachments added by Self	Update public sector project attachments added by themselves.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Delete Public Sector Project Attachments added by Others and Self	Delete public sector project attachments added by others and themselves.	PSC System Administrator
PSC Delete Public Sector Project Attachments added by Self	Delete public sector project attachments added by themselves.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Delete Public Sector Project Attachments added by Others and Self	Delete public sector project attachments added by others and themselves.	PSC System Administrator
PSC Add Public Sector Project Attachments	Add public sector project attachments.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer

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*.

# Using Projects

This topic discusses how to use the Oracle Permitting and Licensing Projects.

A Project is a collection of various records from transactions, which include permits, planning applications, and preapplications. It provides a summarized, consolidated view across project-related records.

Agency staff create and manage such inventory of projects comprising of various records and their attributes, and maintain detailed project information – all easily accessible from one location – the Projects page.

You use the Projects page to manage a complete list of projects with all the details, and perform various tasks.

This example illustrates the Projects page:

Projects

Project	Summary	Contact	Status	Start Date	End Date
Pro-2018-00522 AAA-2018	AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the-art equipment, allowing new offices to just plug and play their systems.	SIMMONS Robert +1 (751) 852-9632	Completed	10-21-15	
Pro-2015-04462 Pro2469	Connuire Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.	Robert M Jacob +1 (751) 852-9562	On Hold	10-04-17	11-20-19
PROJ-OCT2018-4 John Tumac	Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops.	ALBERT MICHAEL SIMMONS +1 (951) 852-9632	Inactive	09-05-17	11-01-19

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Use the project list on the Projects page to perform these tasks:


- Manage project activity
- Create new or update existing project details
- Assign or unassign transactions
- Add and maintain project attachments
- Visualize transactional data
- Add and maintain project contacts
- Access comprehensive project record details

You can access the Projects page by clicking the **Project List** tile on the Agency Springboard, or by clicking **Projects > Project List** in the navigation bar.

## Using the Projects Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, you can perform these actions:

Page Elements	Description
<b>Add</b>	Click to add a new project, assign transactions, and create contacts.
<b>Search</b>	Search by alphanumeric characters on the fields for projects in the list. The projects that meet the search criteria are displayed on the page.

Page Elements	Description
<b>Filter</b>	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
<b>Sort by</b>	Select an option to sort the projects in the list by these fields: <ul style="list-style-type: none"> <li>○ Project</li> <li>○ Project Summary</li> <li>○ Contact</li> <li>○ Status</li> <li>○ Start Date</li> <li>○ End Date</li> </ul>
	Click the <b>Details</b> button to access the details for the selected project.

## Adding a New Project

As an agency staff, you can create new projects to include transactions and contacts.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Add** button.
3. On the Project Details page, add values for the fields in the Projects section:

Page Elements	Description
<b>Project ID</b>	Displays the system generated project ID after you save the project.
<b>Name</b>	Enter the name of the project.
<b>Summary</b>	Enter a detailed description of the project.
<b>Type</b>	Select the type of project from the list of options.
<b>Status</b>	Select the status of the project: <ul style="list-style-type: none"> <li>○ Active</li> <li>○ Canceled</li> </ul>



Page Elements	Description
	<ul style="list-style-type: none"> <li>○ On Hold</li> <li>○ Inactive</li> <li>○ Completed</li> </ul>
<b>Estimated Valuation</b>	Enter an estimated amount for the project.
<b>Start Date</b>	Enter the start date for the project.
<b>End Date</b>	Enter the end date of the project.
<b>Primary Contact</b>	<p>Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the <b>Search</b> option.</p> <p>Select the desired contact and use the <b>Select Contact Type</b> option to select the type of contact.</p>

4. In the **Primary Address** section, click the prompt to open the Search Property page.
5. Use the Search box to filter the parcel, address, or owner values by keyword. Select the record you want by clicking the **Select** button. The Search Property page closes and the selected address appears on the Project Details page.
6. Click **Save** to save the new project and return to the Projects page. The new project record now appears in the projects list.

## Assigning Transactions to a Project

As an agency staff, you assign transactions to a project that you have created. You use the Assign page to assign transactions to your project. Transactions include permits, planning applications, and preapplications.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record that you want to assign transactions to.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page, click the **Assign** button.
5. The Assign page opens with a list of all transactions available in the system. Use the **Search** option to search transactions by applicant, transaction ID, or by an address that is associated with the transaction.
6. The **Filter** allows you to refine your search results further using the transaction applicant's name and an address that is associated with the transaction..
7. Select the transactions using the check box available against each transaction record.
8. Click the **Assign** button to assign the selected transactions and return to the Transactions page, which lists the new transaction assignments.

**Note:** As a project manager, you can assign transactions to your project. The **Assign** page lists only those permits, planning applications, and preapplications that were applied by you. The system ensures that project managers can assign only those transactions that were created by them. See the documentation on Security.

## Unassigning Transactions from a Project

As an agency staff, you can unassign transactions from a project that you have created. You use the Transactions page to unassign transactions from your project.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record from which you want to unassign transactions.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page click the **Edit** button, which enables you to select transaction records to unassign.
5. Use the check box available against each transaction record that you want to unassign and then click the **Unassign** button.

## Viewing and Updating Project Details

You view and manage projects comprising of transaction assignments, project attachments, and project contacts on the Project Details page.

The header displays the project code, project type description, and the project primary address. A map marker displays the primary location of the selected project on the map.

The left panel lists the various links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, and Contacts. Clicking each link opens the detail view on the right panel.

This example illustrates the Project Details page:

The screenshot displays the Project Details page for a project named "Harbor Walk". The page is divided into several sections:

- Project Information:** Project Code: Pro-2018-00520, Residential Development Project, 2200 OTIS DR, ALAMEDA US-CA.
- Map:** A map showing the project location at 2200 Otis Dr, Alameda, CA.
- Overview Panel:**
  - Name:** Harbor Walk
  - Summary:** Harbor Walk transformed an old dog pound into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitvale BART, an organic grocery and local cafes and coffee shops.
  - Start Date:** 5/27/09
  - End Date:** (empty)
  - Status:** Active
  - Primary Address:** 2200 OTIS DR, ALAMEDA US-CA
  - Estimated Valuation:** USD
  - Created By:** PSC\_SUPERUSER today
- Fees by Transaction:** A donut chart showing the distribution of fees across four categories:
 

Category	Percentage
CC-2018-00003	29.7%
EZS-181005-00001	28.2%
SP-181005-00004	22.7%
PPG-00001-OCT05	19.4%
- Project Contact:** Name: SIMMONS Robert, Address: USA

## Using the Overview Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. The Overview page displays the information about the selected project in three sections – Overview, Primary Contact, and Fees and Payments.

4. The Overview section lists the basic information about the project. You can edit values for all the fields except for the **Project ID** and the **Created By** fields, which are system generated. The field descriptions are detailed under *Adding a New Project*.
  - o A graphical chart displays the top five transactions and their percentage fees distribution, calculated using the transaction total fees from all the assignments for the project. *Others* accounts to the fees from the rest of the transactions assigned to the project.
  - o The Primary Contact section displays the details of the contact that was entered at the time of creating the project. You cannot edit the values for these fields on this page.

**Note:** You can change the primary contact from the Contacts page.

  - o The Fees and Payments section displays:

Page Elements	Description
<b>Total Fees</b>	The sum of all the fee values from all the transactions assigned to the project.
<b>Total Payable</b>	The sum of the payable amounts from all the transactions assigned to the project.
<b>Total Paid</b>	The sum of the amounts paid for all the transactions assigned to the project.
<b>Balance Due</b>	The sum of the amounts that is due for all the transactions assigned to the project.  <p><b>Note:</b> Balance amount is the difference between the total payable amount and the total paid amount.</p>


The fields in this section are displayed if there is at least one assignment (permit, planning application, or preapplication) for the project. You cannot edit the values for these fields on this page.

5. Click **Save** to save your changes, if any.

## Using the Transactions Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Transactions** on the left panel to access the list of transactions that are assigned to the project. The Transactions page provides these details:


Page Elements	Description
<b>Edit</b>	Click to enable the selection of transactions for removing them from the project. See <b>Unassigning Transactions from a Project</b> under <i>Adding a New Project</i> .

Page Elements	Description
<b>Assign</b>	Click to open the Assign page and select transactions to assign to the project.  See <b>Assigning Transactions</b> under <i>Adding a New Project</i> .
<b>Filter</b>	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
<b>Sort</b>	Sort the list of transactions by: <ul style="list-style-type: none"> <li>○ Date</li> <li>○ Transaction ID</li> <li>○ Status</li> </ul>
<b>Alert icon</b>	Identify transactions with a status affected by a condition or if they are pending submit.
<b>Transaction</b>	Displays the name and description of the transaction.
<b>Status</b>	Displays the status of the transaction.
<b>Created By</b>	Displays the name of the user who created the transaction, with the date and time of creation.
<b>Applicant</b>	Displays the name, email ID, and contact number of the applicant associated to the transaction.
<b>Property</b>	Displays the address of the property for which the transaction is applied.
<b>Fees</b>	Displays the total fees paid and the balance due, if any.
	Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See <i>Navigating to Planning Application Details</i> .

## Using the Inspections Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.


3. Click Inspections on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

Page Elements	Description
<b>Permit</b>	Displays the permit ID.
<b>Inspection</b>	Displays the inspection ID.
<b>Status</b>	Displays the schedule status of the inspection, for example, Scheduled, Requested, Completed, and Canceled.
<b>Inspector</b>	Displays the inspector assigned to the inspection.
<b>Property</b>	Displays the property associated with the inspection.
<b>Result</b>	Displays the result of the inspection, Pass or Fail.
	Click to access the Inspection Detail page and review the details of the inspection assigned the project. All sections on this page are display-only. See <a href="#">Reviewing Inspection Details</a> .

## Using the Fees and Payments Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid. Click Fees and Payments on the left panel to access the details of the fees and payments associated with a submitted transaction. The Fees and Payments page provides these details:

Page Elements	Description
<b>Total Fees</b>	Displays the total amount of fees that may be applicable to the transaction.
<b>Total Payable</b>	Displays the amount of fees that is designated as payable. Fees that are not payable include fees on hole, for example.
<b>Total paid</b>	Displays the amount of the total fees already collected.
<b>Balance Due</b>	Displays the remaining portion of the fees yet to be collected.
<b>Transaction</b>	Displays the transaction ID.

Page Elements	Description
<b>Fee Description</b>	Displays the description of the fee item as defined when creating a fee item.
<b>Amount</b>	Displays the amount due for each fee item.
<b>Currency</b>	Displays the currency in which the transaction will be paid.
<b>Status</b>	Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due.
<b>Assessed Date</b>	Displays the date the request for payment was issued.
<b>Payment Date</b>	Displays the date payment was received.
<b>Payment Reference</b>	Displays the payment reference issued for the transaction.
<b>Invoice</b>	Displays the invoice number of the agency associated with the permit transaction application.
	Click to access the Fee Item Details page and review the details of the fees.
<b>Viewing Deposit Accounts</b>	Click to open the Deposit Accounts page and view a list of all deposit accounts associated with the project.

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

- Application ID: Click the link 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*.

## Using the Attachments Page

Attachments provide supporting documentation needed by users while managing projects. You view a list of files and upload or download documents associated with your project on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Attachments** on the left panel to access the attachments associated with the project. The Attachments page provides these details:

Page Elements	Description
<b>File Name</b>	View the following information in the Filename field: <ul style="list-style-type: none"> <li>○ Filename with file type extension</li> <li>○ File Size</li> <li>○ Uploaded By user name</li> <li>○ Uploaded On date</li> </ul>
<b>Description</b>	View the description of the attachment as entered by the user who added the attachment.
<b>Category/ Subcategory</b>	View the document category and subcategory for the attachment.  This field appears only if a document group is set up on the Project Type Details page while setting up the project type.  See <i>Setting Up Project Types</i> .
<b>Actions</b>	Click the actions icon to select and perform an action: <ul style="list-style-type: none"> <li>○ View Details</li> <li>○ Download</li> <li>○ Delete</li> </ul>

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

## Adding Project Attachments

You upload files to the Attachments page using the Add Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Add** icon.
5. Select the file to upload in the browser dialog box and click **Open**. The filename appears on the Add Attachments page.

6. On the Add Attachments page, you can enter a description of the file, a document category, and a document subcategory, if desired.
7. Use the look-up prompt to select a document category and subcategory that have been defined by the agency. For more information, see *Setting Up Document Categories and Subcategories*.
8. Click the **Upload** button.

## Downloading Project Attachments

You download a document on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. In the attachments grid, click the **Action** icon for the document you want to download.
5. Select **Download** and save to the location of your choice.

## Deleting Project Attachments

You can use this method for deleting one or more documents.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Edit** icon above the grid.
5. Select one or more documents to delete.
6. Click the **Delete** icon.
7. To delete a single document, access the Attachments page, and select **Delete** in the Action menu for the document you want to delete.

## Using the Data Visualization Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Data Visualization** on the left panel to access graphical charts that display the comparative data related to transactions within the selected project. These graphical charts are organized in three separate tabs, with a grid each displaying a list of all the transactions within the project:
  - o **Fees by Transaction Type:** The chart displays all the project transactions represented as bars – each bar grouping transactions by the transaction type, along with the total amount of fees applicable. Click a bar to list all the transactions for that transaction type with their details at the bottom of the page.
  - o **Fee Details:** The chart displays all the project transactions represented as bars. Each transaction is displayed as a combination of two bars – one bar reads the total amount of all applicable fees and the other reads the total amount of all fees paid. Click a bar to list all the transactional fee item details at the bottom of the page.
  - o **Inspection Status:** The pie chart displays the inspection status of each of the permits assigned to the project. Click a section of the chart to view the details of the inspections pertaining to the permits at the bottom of the page.

## Using the Contacts Page

1. Select the **Project List** tile on the Agency Springboard.



2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Contacts** on the left panel to access the list of contacts that are added to the project. You will see the primary contact that was added at the time of creating the project.
4. Click the **Details** button for the contact record to open the Contact Details page. You can view the contact details and edit certain fields.

**Note:** You cannot delete a primary contact or turn off the **Primary Flag** option. Only agency staff such as an administrator can select from the registered profiles to assign a primary contact. Such an assignment will automatically update the earlier primary contact as not primary.

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:
  - o *Add a contact from registered contacts:* You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.

As a user, you cannot make primary contact assignments for your project. Only agency staff such as an administrator can assign a primary contact from the registered profiles.

The primary contact that was selected at the time of creating the project will longer be a primary contact.

- o *Add a brand new contact manually:* You create a new contact by entering all the contact details and then include in the transaction.

Again, as a user, you cannot make primary contact assignments for your project.



# 10 Tracking Planning Application Activities

## Security Details for Tracking Planning Application Activities

This topic describes important security roles, requirements, or considerations specific to tracking planning application activities.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Planning and Zoning Inquiry	View activity logs for all planning applications.	PSC Agency Staff - All agency users
PSC Planning and Zoning Activity Management	Act and comment on planning activities assigned to themselves.	PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Planning and Zoning Activity Administration	Update and comment on all planning activities.	PSC System Administrator PSC Zoning 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](#).

## Overview of Activity Tracking for Planning Applications

As planning department staff, you use activity tracking to help work through a list of time-sensitive tasks that affect the progress of a planning application.

The activities are driven by local ordinance, state law, and an agency’s internal process, and the activity tracking provides a way to monitor the application. Taken together, the activities form a to-do list of tasks with calculated due dates and the flexibility to make updates when needed. Activities are displayed on the Activity Tracking page in the planning application details. You can also view activities on the Planner Worklist. For more information about using the worklist, see [Using the Planner Worklist](#).

The activities for a planning application are configured by your agency based on events or dates in the application timeline, including when the application is submitted, when the application is accepted, the hearing date, and the hearing decision date. The activities show up in the activity tracking for the planning application when one of the key

events or dates occurs. For more information about configuring activities, see *Defining Planning Application Activity Rules*.

Before you can use activity tracking, the agency sets up a list of activities and maps the group to a planning application type. Whenever you create an application with that planning application type, the associated activity list is used.

The activity due dates can occur prior to or after an event. For example, when the planner schedules a hearing, the activities associated with the hearing date appear in the activity tracking list. You'll see automatically generated due dates based on the activity rules set up by your agency and ensure that all of the deliverables are complete before or after the hearing.

## Viewing the Activity Tracking Page

For each activity, the following information appears in the tracking list. Navigate to the Activity Tracking page by accessing the planning application, then select **Activity Tracking** under the **Planning Application** menu in the left panel on the page. The activity tracking tab is only available if the planning application is associated with an activity group.

Page Element	Description
<b>Activity</b>	Displays the name of the activity or task. This field is read-only and can't be updated.  If the task is overdue, you'll see an overdue notice.
<b>Base Date</b>	Displays one of four milestone dates triggered by an event. The base date is the reference date for calculating the activity due date. <ul style="list-style-type: none"> <li>Received date - The application was received by agency staff. The activity appears on the tracking page when the application is submitted in the system or the received date is updated, depending on the activity rule.</li> <li>Acceptance date - The agency staff accepts the application in their worklist. This date is automatically updated through workflow.</li> <li>Hearing date - The agency staff schedules or reschedules a public hearing for the planning application.</li> <li>Hearing Decision date - The hearing body makes a decision and agency staff enters the decision in the system.</li> </ul> When these events occur, the activity is added to the tracking list.  These dates can change and the due dates may be recalculated depending on the activity rules and the status of the activity.
<b>Due Date</b>	Displays the date the activity or task is due. This date is calculated using the base date and the activity rule for number of days due before or after the base date. This field can be manually updated.
<b>Status</b>	Displays the status of the activity or task. This field can be manually updated
<b>Show All Statuses</b>	Turn on the <b>Show All Statuses</b> switch to view a complete list of activities in the tracking table.  The default view shows activities with an in progress or pending status. When you opt to show all statuses, you'll see history with other statuses, including complete or canceled activities.
<b>Last Updated</b>	Displays the date when the due date or status was last updated. This field can be manually updated.

Page Element	Description
<b>Updated By</b>	Displays the name of the user who last updated the due date or status. This field is automatically updated.
<b>Comments</b>	Click the <b>Comments</b> icon to view and add internal notes for each activity. The number of comments appears on the icon.  The comments also show up on planning application items in the agency staff activity worklist.
<b>Actions</b>	Displays <i>Resubmit</i> when the activity with a Submission Date base date has an incomplete status. Agency staff can then create a new activity with a resubmitted date. This action appears only when the <b>Allow Resubmission</b> option is selected in the activity rules.

## Working with Planning Application Activities

Activity tracking helps you effectively manage important due dates for deliverables due during the planning application process. You can monitor activities when due dates are updated automatically and make manual updates to due dates and statuses to ensure the application progresses as required.

In some cases, activity due dates are updated automatically, such as when a received date is updated or a public hearing is rescheduled. As you work through the tracking list, you can also manually update the due date and the status of activities, and enter the date of the update. In general, you can't add activities, however depending on the setup, you can create a new activity for a resubmitted application. If an application is canceled or withdrawn, all activities are canceled.

### Viewing Automatically Updated Activities

The system automatically updates activity due dates depending on the type of base date, the current activity status, and the activity rules configured by the agency. This section provides details about the automatic updates that occur after different actions are taken, such as updating the received date for an application or rescheduling a public hearing.

Agency staff enter the date an application was received while filling out the intake form on behalf of an applicant. The activity based on the Received Date appears in the tracking table upon application submission. When agency staff updates the Received Date on the application details Overview page, the activity due date is automatically recalculated based on the new received date. However, the due date is recalculated only when the option to **Allow Resubmission** is set up for the activity.

Activities based on the hearing date appear in the tracking table when the hearing is scheduled. The agency can set up the activity rules to create a new activity or update an existing one when the public hearing is rescheduled or the hearing body is changed. The rule is active when the switch to **Redo Activity with New Base Date** is turned on. The system determines the updates based on the redo activity setting, the action, and the activity status.

The table here shows the automatic activity updates for different actions when the base date is the public hearing date.

Action	Current Activity Status	Redo Activity Setting	Automatic Tracking Update
Hearing is rescheduled.	Pending, In Progress, or Not Required	On	Recalculates the due date for the current activity based on the new hearing date and resets the status to Pending.
Hearing is rescheduled.	Pending, In Progress, or Not Required	Off	The due date stays as-is.
Hearing is rescheduled.	Completed	On	Creates a new activity with a new base date and due date. Sets the status to Pending. The completed activity stays as is.
Hearing is rescheduled.	Canceled	N/A	No changes are made to the base date or due date. The canceled activity stays as-is.
Hearing body is changed.	Any	N/A	Deletes all current activities with the old hearing body and creates all new activities with new hearing body. Sets the status to Pending.
Hearing is canceled.	Any except for Canceled	N/A	Cancels all activities.

## Manually Updating Due Dates and Statuses

Although you can't manually delete or modify system-added activities and their base dates, you can manually update the activity due date, activity status, and the date the activity was last updated. If an activity isn't required, you can update the status to Not Required or Canceled.

Let's take a look at how to update these activity attributes for a planning application.

1. Go to the planning application.
2. Select **Planning Application** then **Activity Tracking** in the left navigation panel.
3. On the Activity Tracking list page, select the row of the activity you want to update.
4. You can update these fields:

Page Element	Description
<b>Due Date</b>	Enter the date that the deliverable is due or the deadline for the action that should be taken.
<b>Activity Status</b>	Select a status from the drop-down list. Your agency may provide statuses in addition to the statuses in the system.
<b>Last Updated</b>	Enter the date when you updated the activity.

5. Click **Save**.

## Repeating an Activity for a Resubmitted Application

The Received Date activity that appears when the application is submitted can be repeated when the application is resubmitted. The **Allow Resubmission** switch must be turned on in the activity rule. Here's how to reset the activity due date with a pending status if the application is resubmitted.

1. On the Activity Tracking page, select the row of the activity based on the submission date.
2. Change the status to *Incomplete*. This status is only available if the **Allow Resubmission** switch is turned on in the activity setup.
3. Click **Save**.
4. Click the **Resubmit** link, which is only available when the status is *Incomplete*.
5. On the Resubmit page, the **Resubmitted Date** is automatically populated with the current date, and the **New Due Date** is calculated using the existing activity rule. You can change the **Resubmitted Date** and the due date will be recalculated. You can also override the due date.
6. Click **Save**.

The activity status resets to *Pending*.





# 11 Managing Property Information

## Security Details for Managing Property Information

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Parcel Transactions	Manage public sector parcel transactions.	PSC System Administrator PSC Business Analyst

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 the Parcel Page

View summary information of parcels.

Agency staff uses the Parcel page to view a summary of information related to a parcel, such as the parcel number, address, primary owner and the status of the parcel.

You can use the **Parcel** tile on the agency springboard to navigate to the Parcel page. Click a parcel row to view its details.

Page Element	Description
<b>Parcel Number</b>	The unique identifier of the parcel. This is also known as the assessor's parcel number (APN) for the parcel.
<b>Primary Address</b>	The primary address of the parcel.
<b>Primary Owner</b>	The name of the primary owner of the parcel.
<b>Land Value and Improvement Value</b>	The land value and improvement value of the parcel.

Page Element	Description
<b>Zoning Code</b>	The zoning code of the address of the parcel.
<b>Status</b>	The current status of the parcel. Values are: <ul style="list-style-type: none"> <li>• <i>Active</i></li> <li>• <i>Retired</i></li> <li>• <i>Provisional</i></li> </ul>
<b>Enabled</b>	Turn on the <b>Enabled</b> switch to make the parcel available as a lookup value on other pages.

## Updating Parcel Information

View and update all information related to a parcel.

Agency staff can view and update details of a parcel, such as the parcel type, status, property description. Sections are available for information on land use, building, location and map details.

You can navigate to the Parcel Details page, from the **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to manage its details.

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

Page Name	Description
<b>Parcel Details</b>	View and update details about the parcel such as the parcel type, status and property description. See <a href="#">Updating Parcel Details</a> section later in this topic.  For details on setting up parcels, see <a href="#">Setting Up Parcels</a> .
<b>Parcel Address</b>	View and update addresses associated with a parcel. See <a href="#">Updating Parcel Address Details</a> section later in this topic.  For details on setting up addresses, see <a href="#">Setting Up Property Addresses</a> .
<b>Parcel Owner</b>	View and update information about parcel owners on the Parcel Owner page. See <a href="#">Updating Parcel Owner Details</a> section later in this topic.  For details on setting up owners, see <a href="#">Setting Up Property Owners</a> .
<b>Parcel District</b>	View and update parcel district assignments on the Parcel District page. See <a href="#">section later in this topic</a> .

Page Name	Description
	For details on assigning districts to parcels, see <a href="#">Assigning Districts to Parcels</a> .
<b>Transactions</b>	View summary information of all transactions associated with a parcel. For details, see <a href="#">Viewing Transactions Associated with a Parcel or Property Address</a> .
<b>Attachments</b>	Attachments provide supporting documentation needed by agency staff to manage parcels. For details, see <a href="#">Working with Property Attachments</a> .
<b>Comments</b>	Agency staff can view, modify, and add comments on the Comments page for a parcel. For details, see <a href="#">Working with Comments</a> .
<b>Conditions</b>	Agency staff can apply conditions to parcels so that users interacting with a property are notified of any issues with it. For details, see <a href="#">Applying Conditions to Parcels and Addresses</a> .
<b>Genealogy</b>	Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management. For details, see <a href="#">Working with Parcel Genealogy Transactions</a> .
<b>Parcel Value</b>	View and update parcel values on the Parcel Value page. For details, see <a href="#">Setting Up Parcel Values</a> .

## Updating Parcel Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click a row to view and update the parcel details.

Page Element	Description
<b>Parcel Type</b>	The type of parcel.
<b>Status</b>	The status of the parcel, which can be either <i>Active</i> , <i>Retired</i> or <i>Provisional</i> .
<b>Enabled</b> switch	Turn on this switch to make the row available as a lookup value on other pages.
<b>Property Description</b>	The property description of the parcel.
<b>Effective Start Date</b>	The date on which the parcel becomes valid.
<b>Land Value</b>	The land value of the parcel.
<b>Improvement Value</b>	The improvement value of the parcel.

Page Element	Description
Net Assessed Value	The net assessed value of the parcel.

3. In the Land Use section of the Parcel Details page, view and update details about the land associated with the parcel using the following fields:

- *Zoning Code*
- *Zoning Code 2*
- *Zoning Description*
- *General Plan*
- *General Plan 2*
- *Tax Rate Area*
- *Parcel Size 1*
- *Parcel Size 1 UOM*
- *Parcel Size 2*
- *Parcel Size 2 UOM*
- *Boundary Description*
- *Jurisdiction*
- *Census Tract*
- *Census Block*
- *Subdivision*
- *Climate Zone*
- *Flood Zone*
- *Flood Insurance Rate Map*
- *Liquefaction Risk*
- *Fire Risk*
- *Landslide Risk*
- *Soil Type*

4. In the Building section of the Parcel Details page, view and update details about the building associated with the parcel using the following fields:
  - o *Year Built*
  - o *Structure Size 1*
  - o *Structure Size 1 UOM*
  - o *Structure Size 2*
  - o *Structure Size 2 UOM*
  - o *Number of Dwelling Units*
  - o *Bedrooms*
  - o *Bathrooms*
  - o *Pool*
  - o *Patio*
  - o *Additional Structure*
5. In the Location and Map Information section of the Parcel Details page, view and update the mapping and location details for the parcel using the following fields:
  - o *Map Name*
  - o *Book Number*
  - o *Map Book Page*
  - o *Block Number*
  - o *Lot Number*
  - o *Section Number*
  - o *Latitude*
  - o *Longitude*
  - o *X Coordinate*
  - o *Y Coordinate*
6. Click Save.

## Updating Parcel Address Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel Address** tab in the left navigation panel.

Page Element	Description
<b>Street Number</b>	The street number of the parcel address.
<b>Street Name</b>	The street name of the parcel address.

Page Element	Description
<b>Street Suffix</b>	The street suffix that further describes that street like Drive, Avenue etc.
<b>Direction Prefix</b>	The street direction of the parcel address.
<b>Unit</b>	The unit number of the parcel address.
<b>City</b>	The city of the parcel address.
<b>Postal Code</b>	The postal code of the parcel address.
<b>Primary</b>	Indicates whether the parcel address is marked as primary for that parcel.

4. Click **View More Details** to access the Address Details page to make updates.

Page Element	Description
<b>Enabled</b> switch	Turn on this switch to make the row available as a lookup value on other pages.
<b>Address Details</b>	Turn on the <b>Primary</b> switch to indicate the address as the primary address for the parcel.  View the parcel number with this address and the line one of the address.
<b>Building and Location Information</b>	View and update details, such as: <ul style="list-style-type: none"> <li>○ Street Number, Name and Suffix</li> <li>○ Address Type</li> <li>○ Direction details like latitude, longitude, and X, Y Coordinates.</li> <li>○ Landmark, Crossroad</li> <li>○ Unit, Floor</li> <li>○ City, State, Postal Code</li> </ul>
<b>Contact Information</b>	View and update details, such as: <ul style="list-style-type: none"> <li>○ Name</li> <li>○ Email Address</li> <li>○ Phone numbers (home, work, cell)</li> <li>○ Fax</li> </ul>

5. The Address Details page has tabs in the left navigation panel to access the following pages:
  - Parcel page, see [Viewing the Parcel Page](#).
  - Transactions, see [Viewing Transactions Associated with a Parcel or Property Address](#).
  - Attachments, see [Working with Attachments](#).
  - Conditions, see [Setting Up Conditions](#).
6. Click Save.

## Updating Parcel Owner Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel Owner** tab in the left panel.

Page Element	Description
<b>Owner</b>	The name of the parcel owner.
<b>Primary</b>	The name of the primary parcel owner.
<b>Address</b>	The parcel owner's address.

4. Click **View More Details** to access the Owner Details page.

Page Element	Description
<b>Owner Details</b>	View and update the owner's name and type.
<b>Enabled</b> switch	Turn on this switch to make the row available as a lookup value on other pages.
<b>Primary</b>	Use the <b>Primary</b> switch to indicate if the specified owner is a primary owner or a secondary owner.
<b>Owner</b>	The name of the primary parcel owner.
<b>Secondary Owner</b>	The name of the secondary parcel owner.
<b>Owner Type</b>	The type of parcel owner, such as <i>Personal</i> or <i>Town</i> .
<b>Owner Address</b>	View and update the country, postal code and address of the owner.

Page Element	Description
<b>Contact Information</b>	View and update the contact information for the owner, such as email address, fax, phone numbers (home, work, cell, etc.)
<b>Transfer Information</b>	In the Transfer Information section of the Owner Details page, view the transfer details for the parcel owner.
<b>Last Transfer Type</b>	The last transfer type of the parcel owner.
<b>Document Number</b>	The document number of the parcel owner.

5. The Owner Details page has tabs in the left navigation panel to access the following pages:
  - Parcel, see *Viewing the Parcel Page*.
  - Attachments, see *Working with Attachments*.
6. Click Save.

## Viewing Parcel District Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel District** tab in the left panel.

Page Element	Description
<b>District and Description</b>	Displays the unique identifier for the district and its description.
<b>District Type</b>	Displays the unique identifier for the district type.
<b>District Type Category</b>	Displays the category for the district type. The system-defined values include: <ul style="list-style-type: none"> <li>○ <i>Code Enforcement</i></li> <li>○ <i>Council</i></li> <li>○ <i>Economic Development</i></li> <li>○ <i>Zoning</i></li> <li>○ <i>Inspection</i></li> <li>○ <i>Plan review</i></li> <li>○ <i>General</i></li> </ul>



4. Click **View More Details** to access the Parcel District Details page.

**Note:** You cannot update the district details for a parcel from the Parcel District Details page. In order to change the district-related information for a parcel, use the **Delete** button on the Parcel District Details page to remove the district from the parcel. You can then add a new parcel district row from the Parcel District page. For details, see *Assigning Districts to Parcels*.

#### Related Topics

- [Using Grids](#)

## Viewing Transactions Associated with a Parcel

View summary information of all transactions associated with a parcel or property address.

Agency staff can view a summary of transactions for Permits, Planning Applications, Business Licenses, Cases and Incidents, that are associated with a parcel or property address.

You can navigate to the Transactions page from:

- The **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to view its transactions.
- The **Property Address** tile on the agency springboard. On the Address page, click the address row to view its transactions.

**Note:** A condition icon is displayed on a row if a parcel or property address has a condition applied to it. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the Condition Details page in a new window.

The Parcel page has tabs in the left navigation panel to access the following pages:

- Parcel Address, Parcel Owner, Parcel District pages, see *Updating Parcel Information*.
- Transactions, see details in this topic.
- Attachments, see *Working with Attachments*.
- Conditions, see *Setting Up Conditions*.
- Genealogy, see *Working with Parcel Genealogy Transactions*.
- Parcel Value, see *Setting Up Parcel Values*.

The Address page has tabs in the left navigation panel to access the following pages:

- Parcel page, see *Viewing the Parcel Page* and *Updating Parcel Information*.
- Transactions, see details in this topic.
- Attachments, see *Working with Attachments*.
- Conditions, see *Setting Up Conditions*.

On the Parcel or Address page for the selected row, select the Transactions tab in the left panel. On the Transactions page, click the transaction tab you wish to view for the parcel or address.

Page Element	Description	Additional Information
<b>Business Licenses</b>	Agency staff can view summary information about business licenses that are associated with a parcel or property address.	<i>Viewing Business Licenses Associated with a Parcel or Property Address</i>
<b>Cases</b>	Agency staff can view a summary of cases that are associated with a parcel or property address.	<i>Viewing Cases Associated with a Parcel or Property Address</i>
<b>Incidents</b>	Agency staff can view a summary of incidents that are associated with a parcel or property address.	<i>Viewing Incidents Associated with a Parcel or Property Address</i>
<b>Permits</b>	Agency staff can view application data and statuses for permits using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>
<b>Planning Applications</b>	Agency staff can view application data and statuses for planning applications using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>

## Viewing Business Licenses Associated with a Parcel or Property Address

Agency staff can view a summary of business licenses that are associated with a parcel or property address on the Transactions page, Business Licenses tab.

1. Select the **Parcel** or **Property Address** tile on the Agency Springboard.
2. On the Parcel or Address page, click a row to view its transactions.
3. On the Parcel or Address page, select the Transactions tab in the left panel.
4. On the Transactions page, click the Business Licenses tab.
5. Here are some of the information on the Business Licenses Transactions page for a parcel or property address.

Page Element	Description
<b>License</b>	Displays summary information about the license.
<b>Doing Business As</b>	Displays the name by which the business is conducted, also known as DBA.
<b>Property</b>	Displays the address associated with the location of the business.
<b>Description</b>	Displays the business description.

Page Element	Description
<b>Additional Information</b>	Displays information related to the business license application, such as the name of the user who created the application, the date on which the application was created, and the name of the applicant.
<b>Fees</b>	Displays the total fees for the transaction activity, and the balance due if the total has not been paid.

- 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.

## Viewing Cases Associated with a Parcel or Property Address

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

- Select the **Parcel** or **Property Address** tile on the Agency Springboard.
- On the Parcel or Address page, click a row to view its transactions.
- On the Parcel or Address page, select the Transactions tab in the left panel.
- On the Transactions page, click the Cases tab.
- Here are some of the information on the case transactions page for a parcel or property address.

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

6. Click a row to access the case overview page.

## Viewing Incidents Associated with a Parcel or Property Address

Agency staff can view a summary of incidents that are associated with a parcel or property address on the Transactions page, Incidents tab.

1. Select the **Parcel** or **Property Address** tile on the Agency Springboard.
2. On the Parcel or Address page, click a row to view its transactions.
3. On the Parcel or Address page, select the Transactions tab in the left panel.
4. On the Transactions page, click the Incidents tab.
5. Here are some of the information on the incidents transactions page for a parcel or Address page.

Page Element	Description
<b>Issue ID</b>	This column displays: <ul style="list-style-type: none"> <li>○ The incident ID that is assigned based on the agency's autonumbering rules.</li> <li>○ The incident type and subtype, separated by a hyphen.</li> <li>○ The incident status. Unclaimed incidents have a status of Reported.</li> <li>○ The date on which the incident was reported.</li> </ul>
<b>Location</b>	Displays the incident address and the incident's district type and district.  If district information is missing, a warning icon appears in its place.
<b>Description</b>	Displays the incident description.
<b>Assigned</b>	Displays the name of the technician or code officer to whom the incident is assigned.

7. Click a row to access the incident overview page.

## Working with Property Attachments

Attachments provide supporting documentation needed by agency staff to manage parcels. You view a list of files and upload or download documents on the Attachments page.

### Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
  - Note:** You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.

- On the Attachments page, view the list of property attachments, including this information:

Page Element	Description
<b>Filename and Description</b>	View the filename and description entered by the user upon upload.
<b>File Size</b>	View the size of the attachment.
<b>Category and Subcategory</b>	View the document category and subcategory for the attachment.
<b>Actions</b>	<p>Click to select an action:</p> <ul style="list-style-type: none"> <li>○ <i>View Details</i>: Select to view detailed information about the attachment.</li> <li>○ <i>Download</i>: Select to download the attachment.</li> <li>○ <i>Delete</i>: Select to delete the attachment. You will be prompted to confirm the permanent deletion.</li> </ul>

## Adding Property Attachments

- Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
  - Note:** You can also access these pages through the Property Information menu in the Navigator.
- Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
- Click **Attachments** in the navigation bar.
- Click **Add**.
- Select the file to upload in the browser dialog box and click **Open**.  
The filename appears on the Add Attachments page.
- On the Add Attachments page, enter a description of the file, a document category, and a document subcategory.
  - Note:** The description, document category, and document subcategory fields are optional and can be left blank.

For more information on document categories and subcategories, see [Setting Up Document Categories and Subcategories](#).
- Click the **Upload** button.

## Deleting Property Attachments

- Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
  - Note:** You can also access these pages through the Property Information menu in the Navigator.
- Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
- Click **Attachments** in the navigation bar.
- Click **Edit**.

5. Select the check boxes next to all the attachments that you want to delete.
6. Click **Delete**. You will be prompted to confirm the permanent deletion.

**Note:** You can delete a single attachment on the Attachments page by selecting **Delete** in the **Actions** menu.

## Applying Conditions to Parcels and Addresses

Agency staff can apply conditions to parcels and addresses so that users interacting with a property are notified of any issues with it.




Agency staff apply, modify, and resolve parcel and address conditions on the Conditions page. The Conditions page lists all of the conditions applied to the selected property, with applied conditions followed by resolved conditions. The condition indicator in the header of the details pages displays the most severe condition having a high priority. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.

**Note:** Deleting a parcel or address record in the property information automatically deletes any associated conditions that are applied to the permit or planning application you are working with. See the section *Deleting a Property* under *Working with Property Information*.

### Applying a Condition to a Parcel or Address

1. Click **Parcel** or **Property Address** on the agency springboard.  
Select a property.  
Click **Conditions** in the left panel.
2. Click **Apply Condition**.
3. On the Condition Details page, enter values for the following fields:

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

Page Element	Description
 Lock  Hold   Notice	<ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<b>Apply Condition to Transactions</b>	<p>Applies the condition to new transactions that will be associated with the selected address or parcel. You turn off the switch if you want the condition to be applied only to the transaction you're working with.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p> <p>For more information on setup and condition rules, see <a href="#">Setting Up Conditions</a>.</p>
<b>Include in-process transactions</b>	<p>Turn on this switch if you want to apply the condition to the in-process transactions related to the parcel or address.</p> <p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> link to view the list of transactions where the condition will be applied.</p>
<b>Condition Rules</b>	<p>Select one or more rules from:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>Condition rules are available for selection based on:</p> <ul style="list-style-type: none"> <li>○ <i>Condition setup</i>: If the <b>Apply Condition to Transactions</b> switch is turned off, then only the <b>Prevent Application Progress</b> rule is available for selection.</li> <li>○ <i>Condition severity</i>: For a condition with a Hold severity, you can accept the default rules or select different rules. For a condition with a Lock severity, all condition rules are automatically applied and can't be changed.</li> </ul> <p>See <a href="#">Setting Up Conditions</a>.</p>
<b>Priority</b>	<p>Select a priority for the condition. Values are <i>High</i>, <i>Medium</i>, and <i>Low</i>.</p>

Page Element	Description
<b>Description</b>	Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.
<b>Additional Information</b>	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.
<b>Allow Updates by Parcel Import</b> switch	When the parcel import option is selected to resolve the parcel or address condition, the process will resolve the condition only if the <b>Allow updates by parcel import</b> switch is turned on.  This field displays whether the switch was enabled on the Condition Setup page. See <a href="#">Setting Up Conditions</a> .
<b>Applied By</b>	Displays the name of the user or system that applied the condition with the date.

4. Click **Save**.

## Resolving a Condition

You can resolve a condition that you applied to a parcel or address.

1. Click **Parcel** or **Property Address** on the agency springboard.  
Select a property.  
Click **Conditions** in the left panel.
2. Click **Resolve** for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created. You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.
4. Use the **View Impacted Transactions** link to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
5. Click **Save**.

## Modifying a Condition

You can modify a condition that you applied to a parcel or property address. Any changes you make won't be copied over to the related transaction condition.

1. Click **Parcel** or **Property Address** on the Agency Springboard.  
Select a property.  
Click Conditions in the navigation bar.
2. Click the View More Details button for the condition you want to modify.



3. On the Condition Details page you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

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

4. Click **Save**.

**CAUTION:** Once a condition is saved, you can't make changes to the **Apply Condition to Transactions** and **Include in-process transactions** fields.

## Viewing a Resolved Condition

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

1. Click **Parcel** or **Property Address** on the Agency Springboard.
2. Select a property.
3. Click **Conditions** in the navigation bar.
4. Select a row with a status of **Resolved** and click **View More Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
  - o Resolve condition applied to transactions
  - o Resolution Action
  - o Resolved By
  - o Resolved Date
6. Click **Cancel** to return to the Conditions page.

## Working with Parcel Genealogy Transactions

Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management.

Agency staff can create Parcel Genealogy transactions to manage parcel splits, merges and lot line adjustments. You can use the step-by-step guide to select a genealogy transaction type and establish parent and child parcels. You can also manage attributes, such as addresses, owners, size and districts. Once a parcel genealogy transaction is established, you can view the relationship in the Genealogy tab within the Parcel page.

## Splitting Parcels

To split parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Split** and then click **Add Transaction**.

3. On the Split page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select parcels from the list, which have to be split.
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

## Merging Parcels

To merge parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Merge** and then click **Add Transaction**.
3. On the Merge page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select the parent parcels to be merged from the list.
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes, such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.

Steps	Description
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

4. Click **Submit**.

## Making Lot Line Adjustments

To make lot line adjustments:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Adjust** and then click **Add Transaction**.
3. On the Adjust page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parcels	You can select parcels from the list to make adjustments.
Step 2: Manage Parcel Size	Adjust the parcel sizes.
Step 3: Review	You can review the details of the adjustment made. Validation errors, if any, are displayed at the top of this page.

4. Click **Submit**.

## Viewing Parcel Genealogy Transactions

To view parcel genealogy transactions:

1. Select the Parcel tile on the Agency Springboard.
2. From the Parcel page, click a parcel row.
3. Select the Genealogy tab in the left panel. You can view the details of all the genealogy transactions this parcel has been through. The red star identifies the parcel which is currently being viewed. Click any parent or child parcel link to open the corresponding Parcel Details page in a new window.

## Reconciling Provisional Parcels

Agency staff can now easily reconcile provisional parcels by replacing the temporary parcel identification numbers with a new one. Once reconciled, a cross-reference is established to retain history.

New parcels with the provisional status can be created on the Parcel page or as a result of genealogy transactions. The agency uses the provisional parcel numbers to associate transactions to those parcels while waiting for the assessor's parcel numbers (APNs) from the county. Once APNs are imported, agency staff can search for matched or

unmatched parcels in the provisional status and reconcile them with their matching APNs. After the provisional parcels are reconciled, a cross-reference is established to retain history.

**Note:** The batch process to match provisional parcels should be run prior to performing parcel reconciliation to ensure all provisional parcels have been matched to their associated imported APNs. The BI Catalog report, Transactions with Reconciled Provisional Parcels, lists the transactions that refer to the reconciled provisional parcels. Using this report you can see the provisional parcels that have been replaced with final parcels as a result of parcel reconciliation. For more information, see *Oracle Permitting and Licensing Analytics*.

To reconcile matched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, select the Matched Parcels tab, to view the following fields:

Page Element	Description
<b>Parcel</b>	Lists the provisional parcels with any potential matching APNs. Matching APNs are parcels with the same street number and street name.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>City</b>	The city of the primary parcel address.
<b>Owner</b>	The name of the primary parcel owner.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Reconcile Parcels</b> button	Select the provisional parcel and the matching APN, and then click the <b>Reconcile</b> button to match the provisional parcel with the matching APN and retire the provisional parcel.

3. Click the **Find Matching Parcel** button on a parcel row to open the **Find Matching Parcel** modal which lists a matching APN.
4. In the Find Matching Parcel modal, view the following fields:

Page Element	Description
<b>Search</b>	By default, the search field shows the street number and street name of the primary address of the matched provisional parcel. The search results below appear filtered to list only those matching the search criteria.

Page Element	Description
<b>Parcel</b>	The APNs of the parcels that resulted from the search.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary owner of the parcel.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.

5. Select the check box for the matching APN and click the **Reconcile** button.

After reconciliation, the provisional and matched APNs move to the Reconciliation History tab, from where you can see the history of the reconciled parcels.

To reconcile unmatched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, click the Unmatched Parcels tab, to view the following fields:

Page Element	Description
<b>Search</b>	You can search for a provisional parcel using its primary address.
<b>Provisional Number</b>	The temporary parcel number assigned to newly created provisional parcels. Click the link to view the details of the parcel in a new window.
<b>Creation Date</b>	The date on which the provisional parcel was created.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary parcel owner.

Page Element	Description
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Click the **Find Matching Parcel** button on an unmatched parcel row to search for a matching APN.
- In the Find Matching Parcel modal, view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
Parcel	The APNs of the parcels that resulted from the search.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Select the check box for the matching APN and click the **Reconcile** button.

## Viewing Reconciliation History

In the Reconciliation History page, you can view the details of the provisional parcels reconciled with their APNs. You can also use this page to undo a reconciliation.

To view reconciliation history:

- Select the Parcel Reconciliation tile on the Agency Springboard.
- Click the Reconciliation History tab to view the following fields:

Page Element	Description
<b>Search</b>	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appears filtered to list only those matching the search criteria.
<b>Provisional Number</b>	View the provisional number of the parcel. Click the link to view the details of the parcel in a new window.
<b>APN</b>	View the APN of the parcel. Click the link to view the details of the parcel in a new window.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary owner of the parcel.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.
<b>Reconciled By</b>	The user id of the person who reconciled the parcels.
<b>Date Reconciled</b>	The date on which the provisional parcel was reconciled with its APN.
<b>Undo Reconciliation</b> button	To disassociate parcels which were incorrectly reconciled.

## Undoing a Reconciliation

To undo a reconciliation:

1. Select Parcel Reconciliation on the Agency Springboard.
2. Click the **Reconciliation History** tab.
3. Click the **Undo Reconciliation** button and confirm to revert the reconciliation.





# 12 Managing Contractor Information

## Security Details for Managing Contractor Information

This topic describes important security roles, requirements, or considerations specific to managing contractor information for permits, planning applications, business license applications, and contractors.

### Permit applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in permits for which an applicant or a contact has access until the permit is closed.	PSC Registered Public User
PSC Agency Permits Inquiry	View contractor information on permit applications.	PSC Agency Staff - All Agency users
PSC Permit Contractor Management	Add and update contractor information on permit applications until they are closed.	PSC Business Analyst PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permits Management with Elevated Access	Delete sections of contractor information on permit applications.	PSC Permits Supervisor PSC System Administrator
PSC System Administrator	Manage contractor information on permits at all times.	PSC System Administrator

### Planning applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in planning applications for which an applicant or a contact has access until the planning application is closed.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Planning and Zoning Inquiry	View contractor information on planning applications.	PSC Agency Staff - All Agency users
PSC Planning and Zoning Contractor Management	Add and update contractor information on planning applications until they are closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Business Analyst PSC Principal Planner
PSC Planning Application Management with Elevated Access	Delete sections of contractor information on planning applications	PSC Zoning Administrator PSC System Administrator
PSC System Administrator	Manage Contractor information on planning applications at all times	PSC System Administrator

### Business license applications

Security Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in pending business license applications for which an applicant has access until the application is submitted.  View contractors after the application is submitted.	PSC Registered Public User
PSC Contact User	View contractors in business license applications for which a contact has access after the application is submitted.	PSC Contact User
PSC Agency Business License Inquiry	View contractor information on business license applications.	PSC Agency Staff - All Agency users
PSC Business License Specialist	Manage contractor information on business license applications until they are closed.	PSC Business License Specialist
PSC Business License Manager	Manage contractor information on business license applications until they are closed.	PSC Business License Manager
PSC Business License Business Analyst	Manage contractor information on business license applications until they are closed.	PSC Business Analyst

Security Role	Access Description	Associated Job Roles and Abstract Roles
PSC Business License Application Administrator	Manage contractor information on business license applications at all times.	PSC System Administrator

## Contractors

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Contractor Master Inquiry	View contractor records	PSC Agency Staff - All Agency users
PSC Contractor Master Administration	Administer main contractor records.	PSC System Administrator
PSC Contractor Master Management	Manage main contractor data.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Business Analyst PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician PSC Business License Manager PSC Business License Specialist

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](#).

# Contractor License Overview

Business license, permit, and planning applications can include information about the contractors who perform the necessary work. Agency contractor records help you manage contractors used in the system to ensure licenses are active and in good standing.

## Contractor License Information

Contractor information is stored and maintained in the agency's contractor records, where agency staff manually adds or loads licenses from an external source. Additionally, when agencies don't limit license selection to their list of contractor records and also integrate with an external licensing body, applicants can supply contractor information in permit and planning applications. If an application includes a license number that doesn't yet exist in your main records, submitting the application creates a new contractor record.

If you implement contractor integration, you can validate license information against your state or other external licensing body using the integration capabilities of Oracle Integration Cloud (OIC).

**Note:** The external integration may not provide a license type for the contractor licenses. The **License Type** field is part of the key on the contractor license record and must have a value. Oracle recommends setting up the **License Type** field with a value such as *LICENSE* for use when retrieving and loading licenses from integrations with an external licensing body. If no license type value is assigned by the licensing body, the system can use the *LICENSE* value in the **License Type** field on the contractor license record.

Regardless of whether you integrate with an external licensing body, your contractor records include the same type of information. However, integration affects how you view and manage certain information. The following table describes how you manage information using only contractor records maintained by the agency or using an integration to validate and add licenses to your contractor records.

Information Type	Contractor List Only	Contractor List and External Source
All	<p><b>Note:</b> The agency limits the contractor selection to the agency-maintained contractor list.</p> <p>The agency allows applicants to select contractor licenses from the agency-maintained contractor records list only. In this case, applicants can search for and select licenses from the contractor records only and not from the external licensing body.</p> <p>Agency staff with appropriate permissions manually enter or update license information in the contractor list. Contractor records can also be loaded from an external source, but license selection in the application is still limited to licenses in the list.</p> <p>Applicants who are contractors or their authorized agents can search for and select</p>	<p><b>Note:</b> The agency doesn't limit the contractor selection to the agency's contractor list.</p> <p>The agency allows applicants to select contractor licenses from the contractor records list or an integrated external source. The validation process checks your contractor records first, and if you don't yet have a record of the license, the process retrieves information from the licensing body.</p> <p>Agency staff and applicants perform a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and re-validation is the only way to update the information. However, system administrators are able to modify contractor information.</p>

Information Type	Contractor List Only	Contractor List and External Source
	<p>their license to retrieve information from the contractor list, but can't manually enter their license information.</p> <p>Applicants who are not contractors or authorized agents, such as homeowners, can optionally search for and select licenses to retrieve information from the contractor records about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant.</p> <p>The agency may also restrict access to contractor licenses to authorized contacts only. In that case, you must be an authorized contact to search for and select contractor licenses from the agency-maintained contractor list for use on transactions.</p> <p>You can search for a contractor by license number, license type, business name, or owner name to retrieve license information.</p>	<p>Applicants who enter a license number in an application can use the same validation process.</p> <p>Applicants who self-identify as contractors or the contractor's authorized agents must select at least one license number.</p> <p>Other applicants can search for and select a license to retrieve license details, but they can also leave the contractor license blank. They can't manually enter data.</p> <p>You can search for a contractor by license number, license type, business name, or owner name to retrieve license information.</p>
License status	<p>Agency staff uses the <i>Status</i> field to indicate if a license is active, suspended, expired, and so forth.</p> <p><b>Note:</b> The license status is independent of contractor approval. For example, a license can have an active status but is disabled for use because it isn't approved. Licenses must be enabled to be entered in an application.</p> <p>Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.</p>	<p>The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by re-validating the license number.</p> <p>Your status mapping settings assign a default agency status based on the source status. Agency staff can update the internal status.</p> <p>Your status mapping settings also specify if specific source statuses will prevent applicants from submitting applications. If the application is declined due to the source status, the applicant sees a message explaining that the application can't be submitted. Note that the expiration date is checked regardless of status validation. If the license is expired, the application is declined regardless of the status.</p>
License type	<p>When integration is not enabled, the agency must create a license type for contractor licenses. Set up the license type in the contractor license options.</p> <p>Applicants must select this value as the license type when they enter contractor license information in an application.</p> <p>Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p>	<p>License types must be set up for the contractor licenses.</p> <p>External licensing bodies may not provide a license type for the contractor licenses, but the <b>License Type</b> field is part of the key on the contractor license record and must have a value. Oracle recommends setting up the <b>License Type</b> field with a value such as <i>LICENSE</i> for use when retrieving and loading licenses from integrations with an external licensing body. If no license type value is assigned by the licensing body, the system can use the <i>LICENSE</i> value in the <b>License Type</b> field on the contractor license record.</p> <p>Use license classifications to track the specific types of work that a contractor is licensed to perform.</p>

Information Type	Contractor List Only	Contractor List and External Source

## Adding Licenses to an Application Form

Whether you're a homeowner, contractor, a contractor's authorized agent, or agency staff, you select a contractor license associated with the project while filling out the form for a business license, permit, or planning application. You also identify a contact person for the license.

Your agency may limit your license selection in the application to their own list of approved contractors, regardless of an integration with an external source. In this case, the contractor list is the source of truth and only agency-approved contractors can be entered in the application. Your agency can further limit the contractors displayed in the list to authorized contacts of a contractor license. You can search for a contractor by license number, license type, business name, or owner name to retrieve license information when adding a contractor license.

When your agency doesn't limit your license selection to their list of contractors, and the system integrates with an external licensing body, the process still initially checks the data in the agency's list of contractors. You must have the exact license number to retrieve license information from the external source.

If configured by your agency, the system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission.

When public users review details for submitted applications, they can see the contractor information. As with all other information in a submitted application, the contractor information is read-only for public users.

## Applying as a Contractor or Authorized Agent

Contractors or authorized agents can submit an application for a business license, permit, or planning application. A contractor's authorized agent, such as an employee or contractor associated with the contracting business, can submit applications on behalf of a contractor. The applicant can self-identify as a contractor or authorized agent in the Contractor field group in an application form. When entering the contractor information, you select *Contractor* or *Authorized Agent* as the applicant role. If you don't self-identify as a contractor or authorized agent, this option doesn't appear, and the applicant role is *Applicant*.

Information about self-identified agents is saved to the associated contractor license details. Newly identified agents are saved with a status that shows that verification is pending. Agency staff can review the information, update the verification status, and indicate whether the authorized agent is a contractor operating under the contractor license.

If an applicant self-identifies as a contractor or authorized agent, then the applicant must select a contractor license. If integration is active and license selection isn't limited to the contractor list, the applicant can find the contractor using the exact license number.

The contractor information fields are populated by the process of validating a license number and only a system administrator can manually update them. The system creates a new contractor record in the agency's contractor list if there isn't already a record for the specified license number, and the applicant's contact information is automatically added to the Contacts page in the contractor license details.

Agency staff updating contractor information in the submitted application details can also identify the applicant as a contractor or authorized agent for the selected license.

## Submitting an Application with License Alerts

If your agency has applied one or more conditions to the contractor license, you'll see an icon for the most severe condition when you add a contractor license. You can select the license but depending on the condition rules, you may not be able to submit the application until the condition is resolved. Click the **Condition Applied** icon to see a list of the conditions, including the condition name, severity, description, and the date when the condition was applied.

Agencies also sometimes add extra validations when you add contractors to make sure that contractor licenses meet application requirements. For example, the license requirements for a permit can include a specific license type, classifications, job cost, and insurance attributes. Validations can also check the license expiration date. Depending on the validation setup, you may not be able to submit the application if requirements aren't met unless you are agency staff with a contractor management role.

When you select a contractor to add to an application with license validations, the system displays an alert listing the contractor's missing requirements. Once you've added 1 or more contractors to the application, you'll see an alert that lists the combined validations for the application. The addition of another contractor can satisfy the application-level validation requirements. For example, if a permit requires at least 1 contractor to be a General Contractor, the requirement is satisfied when a General Contractor is added, regardless of the classifications of other licenses.

The Contractor page in the application or transaction details displays the same missing attributes for contractors added during application intake and after submittal.

For more information about contractor license validations, see [Setting Up Validation Groups](#).

## Adding License Contacts

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

You can select multiple contacts for the license. For each contact, you must choose the contact type. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact initially has a level of business license, permit, or planning application access based on the agency setup for the **Contact Type** that you select. The applicant can upgrade the application access level of contacts in the **Contacts** section of the form or after submission in the transaction details. When adding a contractor license contact to a business license application or contraction registration, you must also indicate whether the contact is the license holder or an authorized agent.

When the application is submitted, the applicant who self-identifies as a contractor or authorized agent is added to the list of contacts for the license in the agency's list of approved contractor. The contractor is only available to select as a contact on application forms after the contractor details are verified on the contractor license details page.

Agency staff can also manually add contractors and authorized agents to the contractor license details on the Contacts page. Only system administrators can remove contacts from a contractor record. For more information, see [Adding Contractor License Contacts](#).

For information about managing the contacts associated with a business application, permit, or planning application, see [Working with Application Contacts](#).

## Working with Contractor Licenses




Agency staff use the main contractor license page to view a list of records and summary information about each contractor license.

From here, you can manually create a license record. You can also take various actions for each contractor license, such as accessing license details, and validating or deleting the license record.

Depending on your agency's implementation, the grid on the contractors list page appears in a condensed format, where several fields appear in a column, or an expanded format, where one field appears in each column.

Here's an overview of the summary information and actions you can take on the contractors list page as displayed in the condensed format:

1. Select **Contractor > Contractors**.
2. Review the following summary information:

Page Element	Description
 Lock   Hold   Notice	<p>Indicates that at least one condition is applied to the contractor license. The icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>A Lock condition enforces all rules to restrict permit and planning application activity associated with a license. A Hold condition indicates that one or more rules apply. And the Notice condition shows there's an issue but no restrictions. For more information, see <a href="#">Applying Conditions to Contractor Licenses</a>.</p>
<b>License</b>	Displays the contractor license number and its status.
<b>License Type</b>	Displays the license type. The agency sets up contractor license types on the Contractor License Options page.
<b>Dates</b>	Displays the license issue date (or reissue date, if one exists), and the license expiration date.
<b>Contractor</b>	Displays the name of the contractor business and owner name.
<b>Address</b>	Displays the address of the contractor business.
<b>Phone</b>	Displays the phone number of the contractor business.



Page Element	Description
<b>Email</b>	Displays the email address of the contractor business.
<b>Last Refreshed</b>	Displays the date that license information was most recently synchronized with the external licensing body's record. This field is relevant only if integration is active.
<b>Used in Application</b>	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications.</p> <p>When a record is created in the main contractor pages, the initial value is <i>No</i>. The value is <i>Yes</i> if an application referencing this license has been submitted.</p>
<b>Contractor Approved</b>	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor license is approved by the agency and available for use with an application. You can't select a contractor license or submit an application when a license is not approved in the contractor records. If the agency changes a license to not approved after an application was submitted, an icon on the license in the application details indicates that the license is not approved.</p> <p>This option doesn't affect the license status. For example, you can change an active license to not approved for business purposes.</p>

- Click the column to sort by the fields in each column. When the grid is in the condensed format, you can click the **Contractor** column to sort by *Business Name* or *Owner Name*.

In the expanded format, **Business** and **Owner** are separate columns. In the expanded format, you can personalize the grid display in addition to sorting by column. For information about condensed and expanded grid formats and common grid controls, see [Using Grids](#) and [Personalizing Grid Displays](#).

- Use the three-dot **Actions** menu to perform these actions:

Action	Description
<b>Validate</b>	Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.
<b>Delete</b>	Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the <b>Used in Application</b> field.

- Select the row of the contractor license to access the detail pages, where you can update the contractor information, including contractor approval.

## Adding Contractor Licenses

Agency staff with appropriate permissions can manually enter individual contractor license information in the main contractor records shown in the list on the Contractors page.

Your agency may initially use an automated batch method to load multiple license records from a file or an integration with an external licensing body. The batch method can also be used to update license records through an integration on a regular basis. For more information about adding or updating contractor licenses automatically, see [Loading Contractor Licenses and Contacts](#).

For information about adding contractor licenses to a permit or planning application after it's been submitted, see [Working with Contractors and Agents in Applications](#).

Here's how to manually add a contractor license to the contractor records:

1. Select **Contractor > Contractors**.
2. Click **Add**.

The **Add Contractor** page displays the following the read-only information:

Page Element	Description
<b>License Source</b>	Identifies the license's status coming from the licensing body and brought in through integration with the external source.  See <a href="#">Setting Up Contractor License Options</a> .

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
5. Whether or not your agency integrates with an external licensing body, enter the following:

Page Element	Description
<b>License Type</b>	Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.  Oracle recommends adding a license type with the value <i>LICENSE</i> to the <b>License Types</b> grid in the agency-level contractor license options. That way, if your system is integrated with an external source and the integration doesn't return license types, then <i>LICENSE</i> appears as the default value on the contractor license. For more information, see <a href="#">Setting Up Contractor License Options</a> .
<b>License Status</b>	Select the license status. Values include <i>Active</i> , <i>Canceled</i> , <i>Expired</i> , <i>Suspended</i> , <i>Revoked</i> , and <i>Inactive</i> .

Page Element	Description
	<p>This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses.</p> <p>When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see <a href="#">Setting Up Contractor License Options</a>.</p>

6. If you use integration to get information from an external licensing body:

a. Click **Validate**.

This button is visible only when integration is enabled. The validation process uses the license number to retrieve additional details from the licensing body. When the process finishes successfully, it populates the rest of the fields on the page.

It's helpful to note that contractor selection in the application intake and the transaction details also automatically fills in the contractor fields. However, this information comes from the agency's list of contractors that have already been validated. If the contractor isn't in the agency contractor list, and an integration is available, the contractor information comes from the external source.

b. Confirm the license status.

The read-only **Source Status** field displays the status provided by the external licensing body. This value is updated any time you re-validate the license. Your contractor options map the source status to a status that comes from the set of statuses your agency assigns to licenses. If a source status is not mapped to an agency status, the default agency status is *Other*.

7. Enter, update, or review information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Business information includes these fields:

Page Element	Description
<b>Business Name</b>	The name of the contractor business.
<b>Owner Name</b>	The owner of the contractor business.
<b>Ownership Type</b>	The ownership structure for the business, such as <i>Sole Proprietor</i> or <i>Partnership</i> .
<b>Postal Code</b>	<p>The business address. The <b>Country</b> field displays US.</p> <p>As you enter a <b>Postal Code</b>, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.</p>

Page Element	Description
	If you don't know the postal code, click the <b>Don't know</b> link to display a full set of address fields.
<b>Address Line 1</b> and <b>Address Line 2</b>	The business address. Only one address line is required.
<b>Phone</b>	The phone number for the business.
<b>Email</b>	The email address for the business.
<b>Issue Date</b>	The date that the license was originally issued.
<b>Reissue Date</b>	The date that the license was reissued after a period of inactivity or after it expired.
<b>Expire Date</b>	The date that the license expired or is due to expire.

8. Enter, update, or review additional information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

System-wide contractor options determine what additional information is available and how it is labeled. Your agency can change the section names on the Contractor License Sections page. If the agency displays all available information using the default labels, these sections appear:

Section Name	Description
<b>Classifications</b>	License classifications indicate the type of work that the contractor is licensed to perform.  This grid lists a <b>Code</b> and a <b>Description</b> for each classification.  If integration is not active and the fields are editable, selecting a code displays the associated description.
<b>Contractor Bond</b>	Contractor bond information includes the <b>Company Name</b> (the bond issuer), <b>Policy Number</b> , <b>Amount</b> , <b>Effective Date</b> , and <b>Cancellation Date</b> .
<b>Other Bonds</b>	Information for other bonds includes a <b>Qualifier Name</b> (the name of the qualifying individual on the contractor license bond) and the same fields that appear for contractor bonds.
<b>Workers' Compensation</b>	Insurance information includes the <b>Insurance Type</b> (such as Workers' Compensation), <b>Company Name</b> , <b>Policy Number</b> , <b>Exempt</b> status, <b>Effective Date</b> , <b>Expiration Date</b> , <b>Cancellation Date</b> , and <b>Suspend Date</b> .

Section Name	Description
<b>Attachments</b>	<p>Supporting documents can be added after license information has been saved. Attachment information includes the uploaded document, <b>Document Category</b>, and <b>Document Subcategory</b>.</p> <p>When you modify attachments in the contractor record details, you can add a reference to a person associated with the attachment in the <b>Assigned To</b> field.</p> <p>You can modify or delete an attachment only if you uploaded it.</p>

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

## Managing Contractor License Details

Agency staff can modify the details for an individual contractor license depending on the assigned permissions. Staff can also manage comments and attachments.

### Modifying License Details

When your agency isn't integrated with an external licensing body, both system administrators and permit technicians can update license information. When integration is on, only system administrators can update license information, but permit technicians can approve licenses.

Only agency staff with the contractor administration duty role have the privileges needed to delete a license from the contractor records.

To modify the license information for a contractor:

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to modify.
3. Click the License Details tab in the left panel or the **View Details** link under the License Details section on the overview page.
4. Click **Edit**.
5. Make your updates:
  - o Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
  - o Update the **License Status**.
  - o If integration is active, click the **Validate** button to retrieve the most recent contractor information and refresh the license detail fields.
 

System administrators can update data manually even when integration is active.
  - o If integration is not active, manually modify the contractor information as needed.
6. Click **Save**.

## Working with Attachments

Only agency staff can add, view details, download, or delete attachments in the contractor license record details on the Attachments page. You can modify or delete an attachment only if you uploaded it. Click the Attachments tab in the left panel to open the Attachments page.

1. On the Attachments page, click **Add** to upload the file.
2. Add a description, document category, and document subcategory on the Add Attachments page.

If there are agents for the contractor associated with this contractor license, you can select one of those people to reference in the **Assigned To** field.

3. Click the **Actions** icon and select *View Details* for an attachment to view or modify details. You can update the description, document category, document subcategory, and referenced person.
4. To download or delete an attachment, click the **Actions** icon and select the respective link.

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

## Adding Comments

Only agency staff can add or delete comments in the contractor license record details on the Comments page. You can modify or delete a comment only if you added it. Click the Comments tab in the left panel to open the Comments page. Comments are for internal reference only and not visible to the public.

1. On the Comments page, click the **Add Comment** button to open the Add Comment page and enter a new comment in rich text formatting. Rich text formatting enables you to select fonts, add numbered lists, insert links, and more.
2. You can modify or delete a comment only if it was entered by you. Click the specific comment row to open the editor view and make changes or click the **Delete** button.
3. Click **Save** to post the comment and return to the Comments page.

For more information, see [Working with Comments](#) and [Managing Comments](#).

## Adding Contractor License Contacts

Contacts for a contractor license can be collected during the application or contractor registration process, manually added to the agency-maintained contractor license information, and loaded from a file using a batch import process.

When applicants identify themselves as authorized agents for a contractor in a permit or planning application, their contact information appears on the Contacts page in the license details. Agencies can also manually add contractor contacts or authorized agents associated with the license directly to the contractor license details. You can add contacts who are already registered in the system and also register new contacts.

You may select contacts from the contractor's contact list or manually add authorized contacts during contractor registration or when filling out a business license application. Applicant information is automatically copied to the **Contact Person** section of the contractor license. You must identify whether the applicant is the license holder or authorized agent, and the contact type. The contact type shows the contact's access level to the transaction. Business owners, applicants, primary contacts, and system administrators can change the access level on the Contacts page in the application or transaction details. When the contractor registration or business license is approved by the agency and active, the contacts are added as authorized contacts for the contractor license in the agency-maintained contractor list.

To add multiple license contacts to the license details from a file, use the Load Contractors batch import process. Once the contacts have been loaded, you can update contact information or register new contacts so that they have access to the applications they are associated with. For more information about the batch import process, see *Loading Contractor Licenses and Contacts*.

When a contact is added, the status is automatically verified and active. Only contacts with a *Contractor* contact type and an *Active* status can be selected as the contractor's contact in an intake form.

Only system administrators can delete contacts from the license details.

## Manually Adding License Contacts

Here's how to manually add contacts who are already registered in the system to the license details:

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to modify.
3. Click the Contacts tab in the left panel to open the Contacts page.
4. On the Contacts page, click **Add** to add a contact.
5. On the Select from Registered Users page, click the row for the contact you would like to add.
6. Select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent* and click **OK**.
7. Select a contact in grid to update the verification status and contact information on the Contact Details page. You can't update the contact's name.

You can also register a new contact when you manually add a contact to the license details:


1. On the Contacts page, click **Add** to add a contact.
2. On the Select from Registered Users page, click the **Register New Contact** link.
3. Fill out the registration form with contact information and select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent*.
4. Click **Register**.
5. Click **Done** on the Registration Confirmation page.

## Working with License Contacts Loaded from a File

When a contact has been added to the license details from a file using the batch load process, you can manually update the contact information, update the contact information by selecting a registered user, or register the contact.

The batch load process replaces license contacts already in the license details with the contact information from the file if there's a matching email, first name, middle name, and last name. If an exact match of email and name isn't found, the process creates a new license contact.

Here's how to update license contacts that were loaded from a file in the license details:

1. In the Contacts grid, you'll see the **Contact Uploaded from File** icon in the row of contacts added using the batch load process: 
2. Click the row of the contact you want to manually update. On the Contact Details page, you can update the contact information, including the name, verification status, contact type, email address, address, and phone.
3. If you want to update the contact information by selecting a registered user or register the contact, click the **Actions** button at the end of the row for the selected contact and click *Select or Register User* in the actions menu.
4. On the Select from Registered Users page, you can:
  - o Select an existing registered user from the list.

If the email address of the loaded contact matches a registered user in the system, select the user in the search results to update the contact information.

Select the contact type from the drop-down list: *Contractor* or *Authorized Agent* and click **OK**.

- o Click the **Register New Contact** link to register this contact using the loaded contact's information.

The registration form is automatically filled in with contact information from the loaded file. Select the contact type from the drop-down list: *Contractor* or *Authorized Agent*.

Click **Register**.




Click **Done** on the Registration Confirmation page.

## Viewing Contractor License Use

The Transactions page in the contractor details provides a list of the permit and planning applications where the contractor is used.

Agency staff can view all transactions associated with the contractor license in the agency's license details.

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to review.
3. Click the Transactions tab in the left navigation panel.
4. View the applications listed on the Transactions page.

Page Element	Description
	Indicates the column that shows condition icons when a grid is displayed in the expanded format. Click the condition icon to view a list of conditions placed on the application and drill down to the Conditions page in the application details.  For more information about conditions placed on permits or planning applications, see <a href="#">Applying Conditions to Applications</a> .
 Show All Statuses	Turn on the switch to display applications that are no longer in progress, such as completed or withdrawn. When the switch is off, the grid displays only applications that are in progress.
	Indicates applications where the contractor is no longer being used.
Application information	Review summary information about an application: <ul style="list-style-type: none"> <li>o ID</li> <li>o Application</li> <li>o Status</li> </ul>



Page Element	Description
	<ul style="list-style-type: none"> <li>○ Property</li> <li>○ City</li> <li>○ Description</li> <li>○ Applicant</li> <li>○ Total Fees</li> </ul>

**Note:** For information about grid formats and common grid controls, see *Using Grids* and *Personalizing Grid Displays*.

5. Click the transaction row to open the application's Overview page in the permit or planning application details. If the transaction is in a *Pending* status, the application form opens when you click the row.

## Managing Authorized Agents

Authorized agents are added when an applicant self-identifies as an agent for a licensed contractor on an intake form. Agency staff can also manually add and update authorized agents on the Contacts page in the contractor record details, and indicate whether the authorized agent is a contractor operating under the contractor license.

The agent's name and contact information are copied from the applicant information on the intake form and added to the contact list in the **Contacts** tab of the contractor license details. You can verify the agent and update their verification status depending on the results. Agents who are pending verification or whose verification failed have an inactive status.

When you manually add an authorized agent or contractor to the contractor details, the new contact is automatically active. For information about manually adding authorized agents or contractors operating under a license, see "Adding Contacts" in *Managing Contractor License Details*.

To manage authorized agents for a license:

1. Select **Contractor > Contractors**.
2. Locate and select the contractor license.
3. Click the **Contacts** tab in the left navigation pane to access the Contacts page with authorized agents and contractors associated with the license.
4. Review the following information:

Page Element	Description
<b>Name</b>	Displays the authorized agent or contractor's name, email, and phone.
<b>Email</b>	Displays the email address of the license contact.
<b>Phone</b>	Displays the phone number of the license contact.
<b>Business</b>	Displays the business name of the license contact.

Page Element	Description
<b>License Holder</b>	Indicates whether this authorized agent is the license holder of the contractor license.
<b>Type</b>	<p>Displays the relationship this person has to the contractor license:</p> <ul style="list-style-type: none"> <li>○ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license.</li> <li>○ <i>Contractor</i>: A person who is a contractor operating under this license.</li> </ul> <p><b>Note:</b> Only active contractors can be selected as a contractor license contact on the permit or planning application intake form.</p>
<b>Active</b>	<p>Displays <i>Yes</i> if the agent has been verified.</p> <p>Displays <i>No</i> if verification is pending or the verification has failed.</p>

5. Click the row for an authorized agent to access the contact details.
6. In addition to the contact information, you can update these fields on the Contact Details page. You can update everything except the agent's name.

Page Element	Description
<b>Verification Status</b>	<p>Select an option:</p> <ul style="list-style-type: none"> <li>○ <i>Verified</i></li> <li>○ <i>Pending verification</i></li> <li>○ <i>Verification failed</i></li> </ul> <p>The default status for an agent who submits an application is <i>Pending verification</i>. When you manually add an agent, the status is <i>Verified</i> and the <b>Active</b> check box is available.</p>
<b>License Holder</b>	Select the check box to indicate that this authorized agent is the license holder of the contractor license.
<b>Active</b>	Select the check box to indicate that the agent has been verified. When the verification status is <i>Pending verification</i> or <i>Verification failed</i> , the <b>Active</b> check box is automatically deselected.
<b>Business</b>	Enter the agent's business name.
<b>Type</b>	Select <i>Authorized Agent</i> or <i>Contractor</i> to indicate how this contact person is associated with the license.

Page Element	Description

7. Click **Save**.

## Applying Conditions to Contractor Licenses

Agency staff can apply conditions to contractor licenses to indicate an issue exists and limit permit or planning application activity when the contractor license is used. For example, a condition applied to a contractor license may prevent the submittal of an application where the license is selected or an inspection can't be requested for a permit associated with the license.

Agency staff apply, modify, and resolve contractor conditions on the contractor records in the agency-maintained list. The Conditions page in the contractor details lists all of the conditions applied to the selected contractor, with applied conditions followed by resolved conditions. The condition indicator in the header of the detail pages displays the most severe condition. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.




When you select the option to apply a contractor condition to transactions, the contractor condition is applicable to permits and planning applications when the license is used. You can choose whether to apply the condition to in-process permits and planning applications.

**CAUTION:** Changing the license type clears conditions on the license. The license type can only be changed when the license isn't used on a transaction and doesn't have any conditions. For more information about license types, see [Contractor License Overview](#) and [Adding Contractor Licenses](#).

## Adding a Condition to a Contractor License

1. Click **Contractors** on the agency springboard.  
Select a contractor license.  
Click **Conditions** in the left panel.
2. Click **Apply Condition** in the right panel.
3. On the Condition Details page, enter values for the following fields:

Page Element	Description
<b>Condition Name</b>	Use the lookup prompt to search for and select the condition that you want to apply. The search page lists the available conditions set up for contractor licenses along with their severity, display message, and description.  For more information on conditions, see <a href="#">Setting Up Conditions</a> .
<b>Display Message</b>	Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and can't be updated here.

Page Element	Description
<p><b>Severity</b></p> <p> Lock     Hold</p> <p> Notice</p>	<p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<p><b>Apply Condition to Transactions</b></p>	<p>Applies the condition to permits and planning applications that are associated with the selected contractor license.</p> <p>When you turn off this switch, the only condition rule that can apply is <i>Prevent Application Progress</i>, which prevents you from submitting an intake form using the contractor or manually adding the contractor to a permit or planning application.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p> <p>For more information on setup and condition rules, see <a href="#">Setting Up Conditions</a>.</p>
<p><b>Include in-process transactions</b></p>	<p>Turn on this switch if you want to apply the condition to the in-process permits and planning applications related to the contractor license.</p> <p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> link to view the list of permits and planning applications where the condition will be applied.</p>
<p><b>Condition Rules</b></p>	<p>Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied.</p> <p>Available rules include the following:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b> (applicable only when a license is used on an intake form)</li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>You also can't add the license to the Contractor page in the application details when the <b>Prevent Application Progress</b> rule is applied.</p>

Page Element	Description
	For condition rule descriptions, see <i>Setting Up Conditions</i> .
<b>Priority</b>	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
<b>Description</b>	Displays the description entered by your agency administrator on the condition setup page, but you can update the text here.
<b>Additional Information</b>	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.

4. Click **Save**.

## Resolving a Condition

You can resolve a condition that was applied to a contractor license. You must resolve the Lock and Hold conditions on licenses to lift any restrictions on application activity.

1. Click **Contractors** on the agency springboard.

Select a contractor license.

Click **Conditions** in the left panel.

2. Click **Resolve** for the condition you want to remove.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Click **Save**.

You can view resolution details for a resolved condition by clicking the **View More Details** button for a condition in the list.

## Modifying a Condition

You can modify a condition that you applied to a contractor license.

1. Click **Contractors** on the agency springboard.

Select a contractor license.

Click **Conditions** in the left panel.

2. Click the **View More Details** button for the condition you want to modify.
3. On the Condition Details page you can update the priority, description, and additional information.
4. Click **Save**.

You can't modify any fields for a resolved condition, but you can view the resolution details by clicking the **View More Details** button.



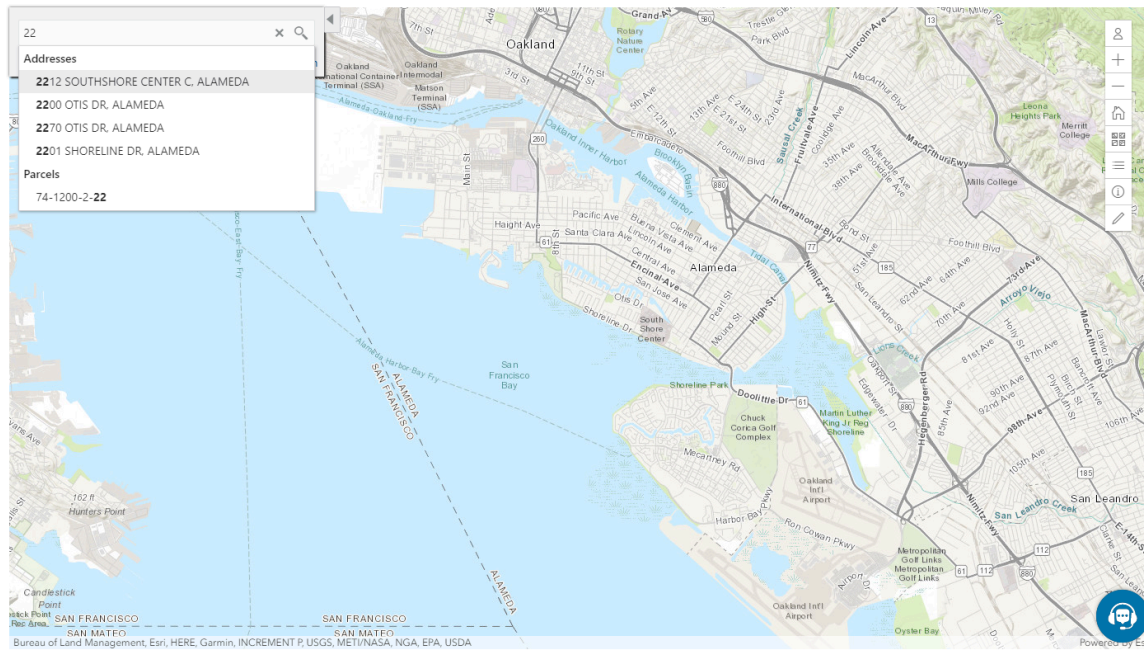
# 13 Working with Maps

## Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. 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 <b>Main Map</b> in the drop-down menu that appears.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> </ul>

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

## Additional Maps for Applications

This table lists additional maps that support applications:

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



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

## Maps for Code Enforcement

This table lists additional maps that support code enforcement:

Map Name	Users	Navigation	Description
Agency - code enforcement	Agency staff	On the Code Technician Worklist page, go to a tab for managing incidents and then click the <b>Map View</b> icon.	View the locations of incidents that appear on the selected worklist tab.  See <i>Using the Code Technician Worklist</i> .
Code enforcement issue intake	Registered and anonymous public users	Follow the guided process for reporting an issue until you reach the page where you enter the issue location.	Identify the location of an issue that is being reported.  See <i>Reporting Issues</i> .
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the <b>Location of the incident</b> option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application.  See <i>Overview of Mobile Oracle Municipal Code Officer</i> .

Map Name	Users	Navigation	Description
Public - code enforcement	Registered and anonymous public users	On the code enforcement landing page, click the <b>View Recent Issues</b> tile.	View recent code enforcement issues.  See <i>Viewing Recent Issues</i> .

## Maps in Transaction Headers

This table describes the map that appears in transaction headers:

Map Name	Users	Navigation	Description
Transaction header	Agency staff  Registered public users	Access the detail page for the transaction.	The map that appears at the top of various detail pages. For example, this map appears in the detail pages for business 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

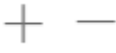








Image	Name	Configuration	Description
			displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the <b>Enable Zoom</b> switch on the map profile.	Use these tools to zoom in or out.  You can also double-click a map location to zoom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

Image	Name	Configuration	Description
	Show Sketch Tools or Hide Sketch Tools	Use the <b>Show Sketch</b> 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 <b>Show Print</b> switch on the map profile to enable the print widget.	Click to open the <b>Export</b> 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.

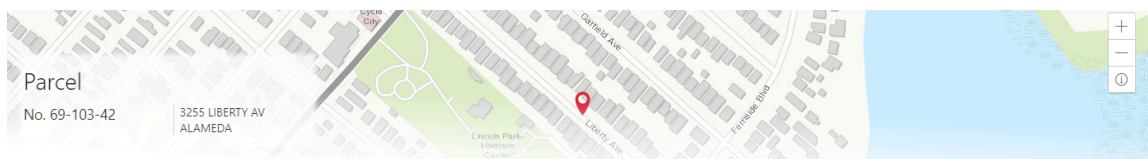
## Viewing Map Markers

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.

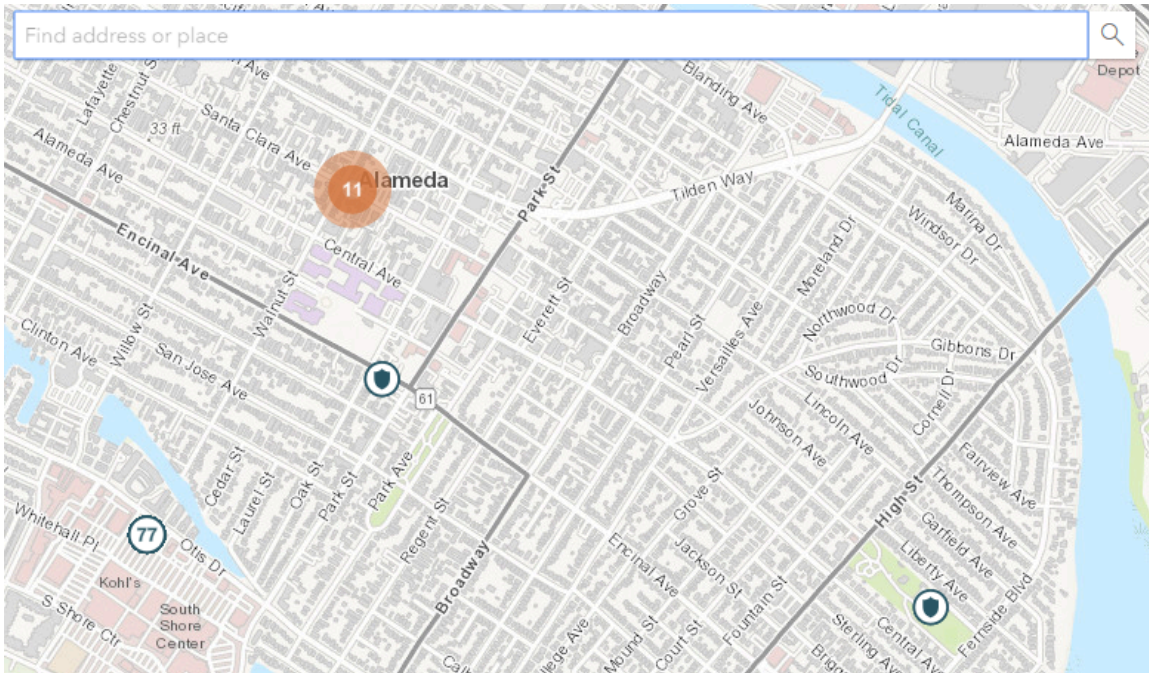


### Other Map Markers







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.

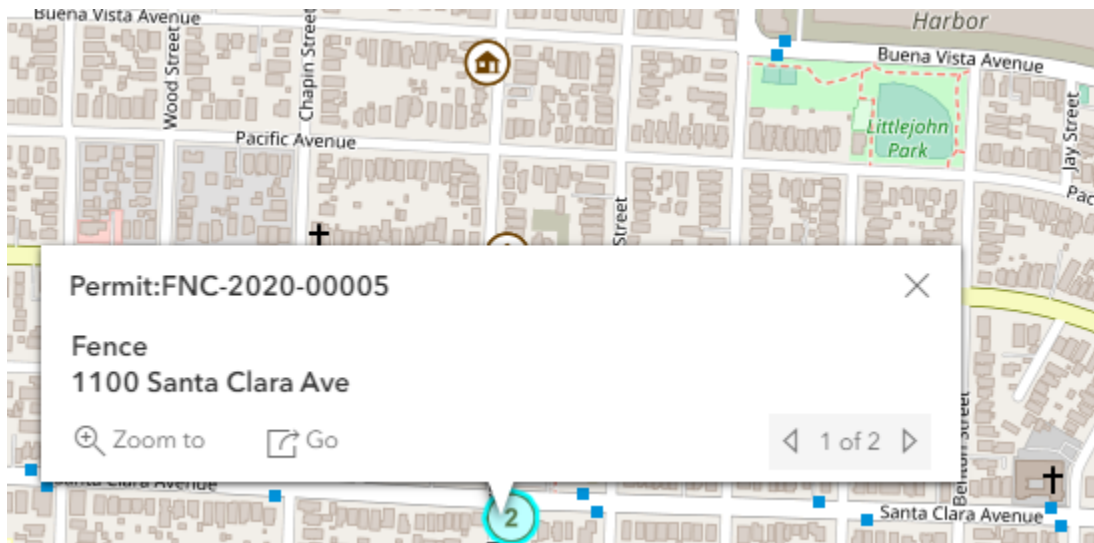


## Viewing Details for a Marker

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.

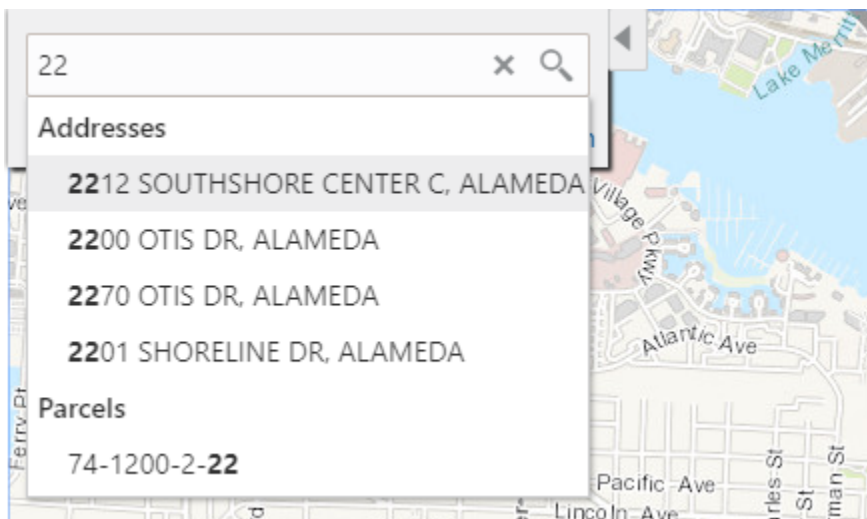
- Search for transactions and view transaction markers on the map.

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](#).

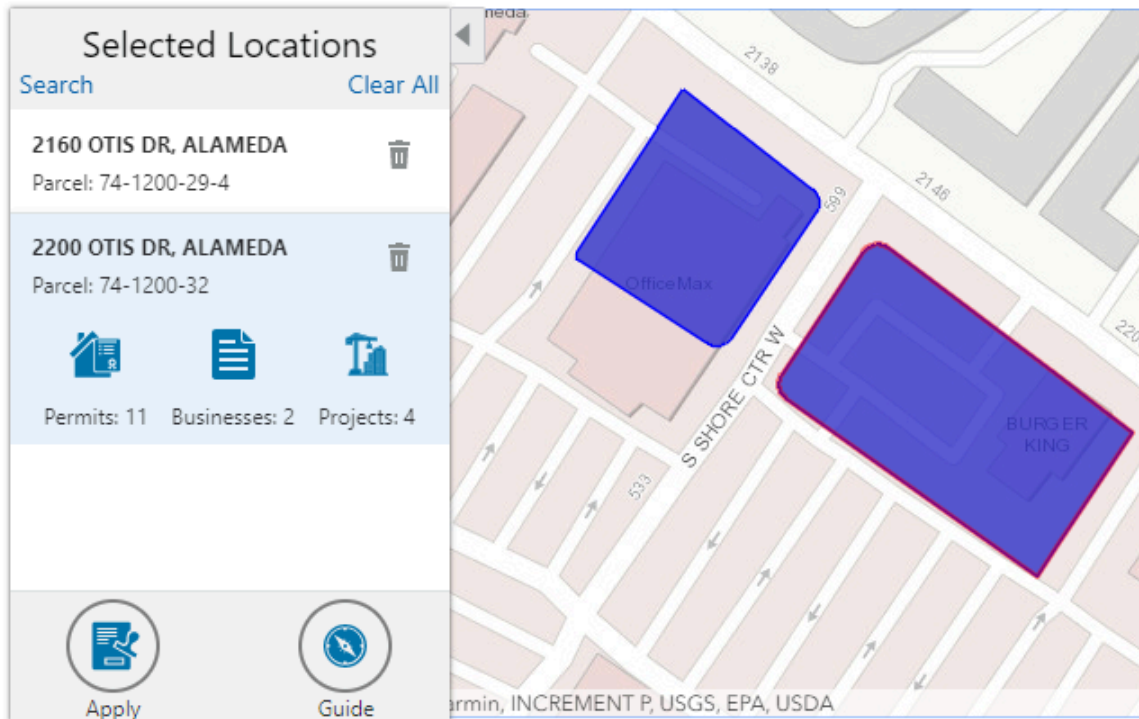
### Selecting Properties Using the Basic Search

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**.

**Note:** Agencies can choose to hide their business license and other business information from appearing in the search results and on the maps. For details on how to hide business information, see [Setting Up Agency-Level Options for Business Licenses](#) and [Managing Business Information](#).

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

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

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

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

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

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

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

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

5. Use these options to deselect properties:

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

## Selecting Properties Using the Selection Toolbar





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



To select and deselect properties using drawing tools:

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

The drawing toolbar appears.

2. Use these tools to make your property selection:

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

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

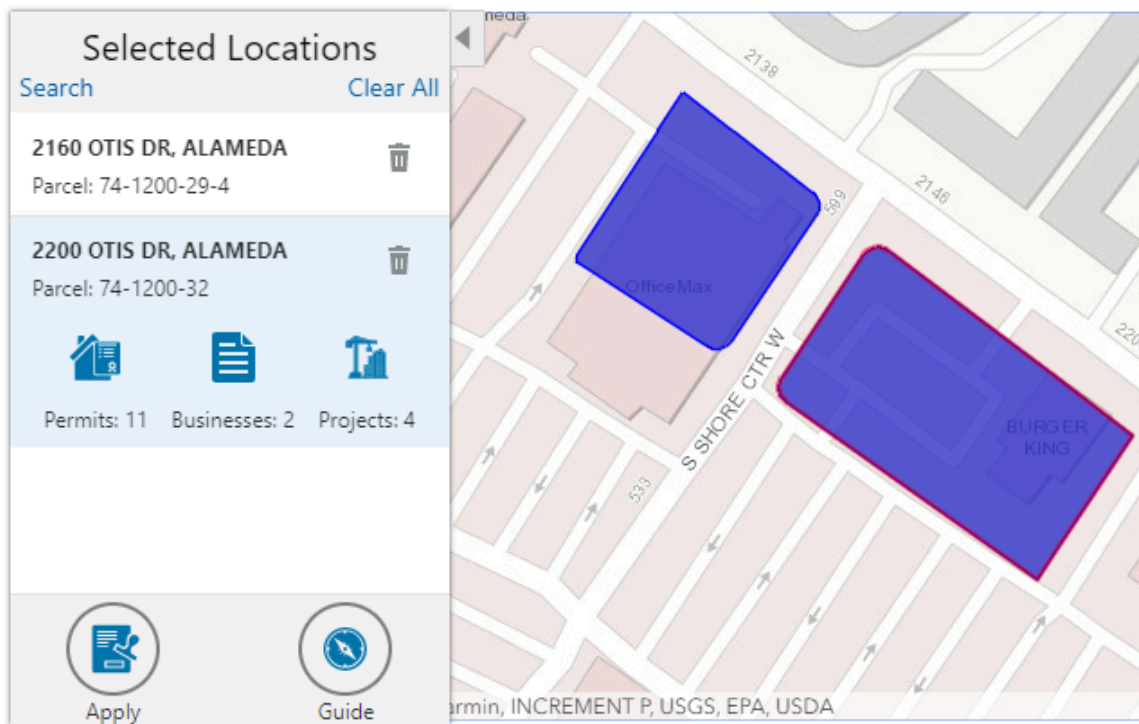
**3.** Review details of your selections on the Selected Locations list.

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.

**Note:** If the selected property has an associated business license that is marked to be hidden, then the icon label will not include it in its count.

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).

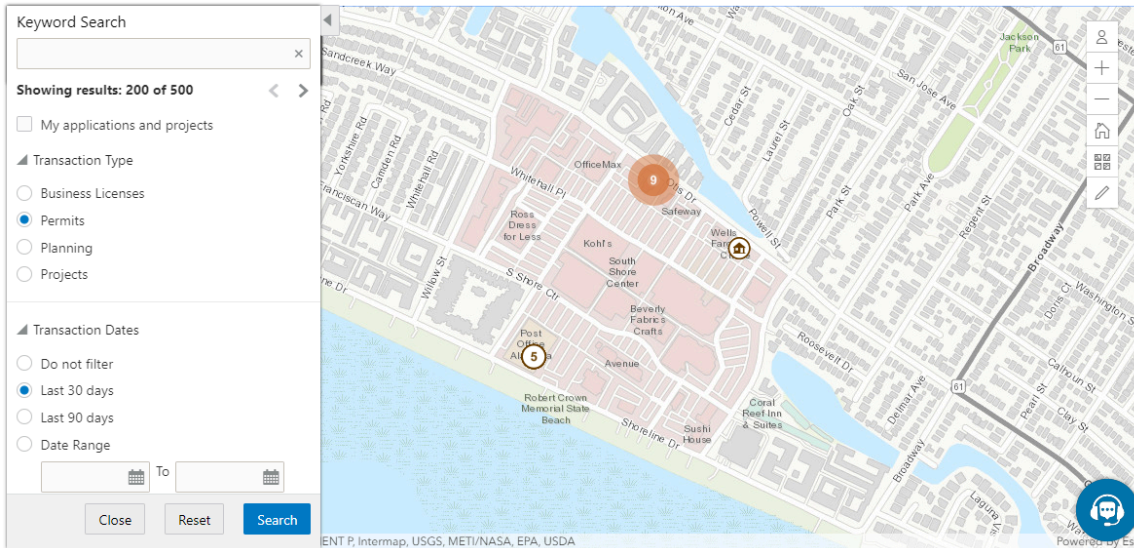
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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**.

**Note:** Agencies can choose to hide their business license and other business information from appearing in the advanced search results and on the maps. For details on how to hide business information, see [Setting Up Agency-Level Options for Business Licenses](#) and [Managing Business Information](#).

4. In the **Transaction Dates** section, choose a date range to search.

Options include **Do not filter**, **Last 30 days**, **Last 90 days**, or a custom **Date Range**. If you use a custom date range, enter a start date, end date, or both to define the range.

For date-restricted searches:

- The application submission date must fall in the specified time period.
- A project start date must be after any start date you specify. If you use a custom date range with an end date, the project end date must be before any end date you specify.



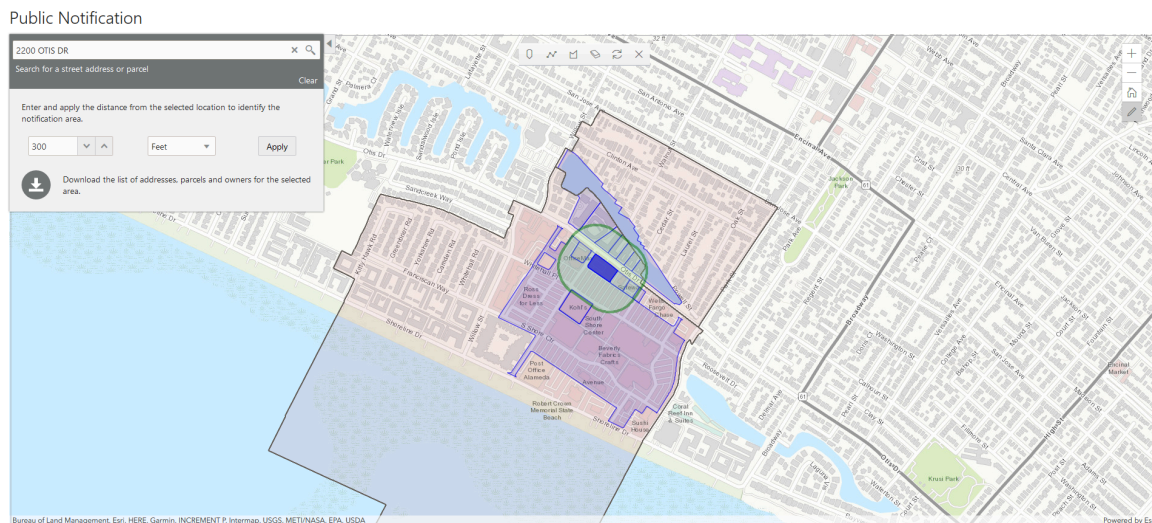
5. Click **Search** to perform the search.  
Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.  
Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons to scroll to a different block of results and update the map to show markers for the new block of results.
6. To clear search criteria, click **Reset**.
7. To close the advanced search and return to the simple location search, click **Close**.

## Creating Map-Based Public Notification Lists

The Public Notification map enables you to define an area on a map and generate .csv files for the parcels, owners, addresses, and neighborhood attributes that are included in that area. Use the .csv files to create your mailing list. The notification area consists of all properties that are at least partially within a specified distance of the selected property or properties.

A context-specific instance of this page is available for scheduling hearing notifications. See [Generating a Hearing Notifications List](#).

The following example illustrates the Public Notification page, where you can select properties, define a notification area around the selection, and download lists of addresses, parcels, owners, and neighborhood attributes in the notification area.




To define a notification area and generate notification lists:

1. Access the Public Notification page.  
To access the page from the global header, click the Maps icon, then click **Public Notification** in the drop-down menu.  
You can also access the page directly from the list of hearings for a planning application. If the hearing schedule is final, the action menu for the hearing includes the **Generate Notifications List** action. This action opens the Generate Notifications List window, which contains the Public Notification page. For more information, see [Generating a Hearing Notifications List](#).
2. Select a property, or confirm the default property selection.

If you access the Public Notification page from a hearing for a planning application, the property or properties from the planning application are selected by default.

The two methods for selecting properties are:

- Use the search field to search by street address or parcel number, then click the desired property in the type-ahead list or the search results.
- Click the Show Selection Tools icon on the main map toolbar: 

Use the selection tools such as **Draw Point**, **Draw Polyline**, or **Draw a Polygon** to select properties.

For detailed information on using the selection tools, see [Using the Main Map and Explore Your City Map](#).

3. Define the notification area by entering a buffer distance surrounding 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 a unit of distance for the buffer area: *Feet, Miles, Meters, or Kilometers*.

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 buffer 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 buffer distance for the boundary, or both, and then click **Apply** again.
6. To clear the property selection and the notification area, click either the **Deselect All** tool or the **Clear** link on the Search overlay.
7. Turn on the **Modify Selection** switch to use the selection tools to manually add parcels outside of the notification area or remove parcels from the notification area.

The selection outline around the parcel appears when you add a parcel or is removed when you deselect a parcel.

8. When 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.

9. Save the CSV files so your agency can use them to generate notifications.

The notification process is not part of the Oracle system.





# 14 Working with Payments

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

4. Click **Save**.

## Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:
  - o Suspend an open cashier session by setting the **Status** to *Suspended*.
  - o Reopen a suspended or closed cashier session by setting the **Status** back to *Open*.  
This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See [Setting Up Agency Payment Options](#).
  - o Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

You can now close a cashier session with a zero balance.

**Note:** The system populates the **End Time** field with the date and time the session was closed.

4. Click **Save**.

**Note:** You cannot edit a cashier session that has been reconciled. See [Reconciling Cashier Sessions](#).

## Reconciling Cashier Sessions

Agency staff adjust and reconcile cashier sessions on the Reconcile Cashier Session page.

Agencies that collect payments must reconcile the money collected in the form of cash and checks at the end of each cashier session. On the Reconcile Cashier Session, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page.

Reconcile Cashier Session Cancel Save Reconciliation Complete Reconciliation

Cash Drawer ID: Cash Drawer 01      Session ID: 1022  
 Start Time: 9/29/18 3:26 AM      End Time: 8/8/19 11:25 PM  
 Status: Closed      Reconcile Status: Unreconcile

---

Payment Information

Payment Method	Currency	Opening Balance	Recorded Amount
Cash	USD	100	93.5
Personal check	USD	0	67

Comments

## Reconciling Recorded and Actual Amounts

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the row for the cashier session that you want to reconcile.

**Note:** You can view payment information for open cashier sessions on this page, but a cashier session must be closed before you can reconcile recorded and actual amounts. For more information on closing cashier sessions, see *Working with Cashier Sessions*.

3. Click the row for the payment method that you want to reconcile to access the Payment Details page.

This example shows the Payment Details page.

Payment Details x

[Save](#)

Payment Summary

Payment Method: Cash      Currency: USD  
 Opening Balance: 100      Total Overage: 0  
 Recorded Amount: 93.5      Total Shortage: 1.25  
 Actual Amount:

Payment Details

Receipt Number	Receipt Line Number	Recorded Amount	Actual Amount
6	1	67	
5	1	26.5	

4. Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

Page Element	Description
<b>Payment Method</b>	Select between <i>Personal check</i> and <i>Cashier check</i> .
<b>Actual Amount</b>	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.

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

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

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

## Printing a Cashier Session Reconciliation Report

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

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

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

Page Element	Value
<b>Parameter ID</b>	1
<b>Parameter Name</b>	P_RECONCILE_ID
<b>Parameter Data Type</b>	String

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

## Generate Accounting Entries for Reconciliation Overages and Shortages

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

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

## Printing Deposit Slips

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

You print deposit slips using the Print Deposit Slip page.

### Prerequisites

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

### Generating Deposit Slips

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

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

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

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

3. Click **Print**. The generated deposit slip file opens in a separate browser tab.

**Note:** If your browser has a pop-up blocker, make sure it allows pop-up windows from the URL associated with Oracle 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 Amount Paid
- o Currency
- 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 deposit account.

- o Record ID
- o Record type
- o Payment Status
- o Deposit Account Number

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

#### Payment History Lines

Classification	Record Type	Record Id	Item Description	Item Amount	Item Currency
PMT	PMTQACONDTEST	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
OVPY_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](#).

You can reverse payments applied in error. For more information, see [Reversing Payment Application Errors](#).

## 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.

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.

## 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 ID: RFND\_20210727T214180000Z1105E

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

Cancel Process Refund Void Refund

Refund Lines

Download

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

On Account Reference ID OVPY\_20210211T2211300000Z296E  
 Payment Reference ID CASH\_20210211T221105005Z396669  
 Payment Transaction ID RECT-2021-10004  
 First Name Alden  
 Last Name Richards  
 Amount Due 225.00 USD  
 Amount Paid 250.00 USD  
 On Account Date 2/11/21  
 On Account Status Unapplied  
 On Account Amount 25.00 USD  
 Refund Request Date  
 Refund Status  
 Refund Amount  
 Refund ID  
 Receivables Receipt Status ORA\_NONE

Cancel **Initiate Refund**

3. If the payment on account hasn't been refunded yet, the **Initiate Refund** button is available. Click it to initiate a refund for the overpayment. The **Refund Status** changes to *Pending*.

4. Access the Refund History page to process the pending refund. For more information, see [Viewing and Processing Refunds](#).
5. Confirm that the payment's **On Account Status** shows as *Refunded* on the Payments on Account page. This example shows the status of a payment on account updated to Refunded.

Payments on Account

On Account Reference ID	First Name	Last Name	Payment Transaction ID	On Account Date	On Account Amount	Currency	On Account Status
OVPY_20210216T152624000023195E	Peter	Skate	RECT-5020	2/16/21	200.00	USD	Unapplied
OVPY_20210211T220913000027909E	William	Brown	4	2/11/21	10.00	USD	Unapplied
OVPY_20210211T22113000002296E	Alden	Richards	RECT-2021-10004	2/11/21	25.00	USD	Refunded
OVPY_20210215T113152000021377E	Peter	Skate	RECT-5006	2/15/21	200.00	USD	Unapplied
OVPY_20210215T16265100002433E	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
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>



Page Element	Description
<b>By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<b>By date</b>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<b>Month</b>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

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

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## Processing Returned Checks

Use the Cash Drawer Payment History page to reverse a payment associated with a returned check.

## Reversing or Voiding Payments

1. Select **Billing and Payment > Cash Drawer Payment History** page in the navigator.
2. Search for the check number and select it to view the Cash Drawer Payment Detail page.
3. Click the **Reverse Payment** button.
4. In the **Reverse Payment** modal window, select a **Reversal Reason** and specify if a returned check fee should be charged.
5. Click **Submit**.

**Note:** If agency payment options are configured to re-instate fees, then agency staff will see the Reverse Payment button on the Cash Drawer Payment History page. If agency payment options are configured to not re-instate fees, then agency staff will see a Void Payment button on the Cash Drawer Payment History page.

The following activities happen when agency staff reverses a payment for a check return:

- The original fee paid rows are reversed and new fee rows are created with a due status.
- A fee record is created for the returned check fee amount.
- A recovery fee record is created if the overpayment associated with the payment has been refunded. This is to recover the funds.
- A refund for an overpayment amount is voided if it is initiated, but not yet processed when the associated payment is reversed.
- The original payment record is reversed.

The following activity happens when agency staff void a payment for a check return:

- The original payment record is marked as void.

For more information, see *Setting Up Agency Payment Options*.



# 15 Working with Accounting

## Generating Accounting Transactions and Journal Entries

Depending on the accounting framework implemented by your agency, you use accounting batch processing to generate subledger accounting events or accounting transactions and journal entries from source transactions such as payments and refunds.

Accounting transactions and journal entries are created if the offering-level Accounting Framework Option is *Public Sector Accounting*, and subledger accounting events are created if the offering-level Accounting Framework Option is *Financials Cloud Subledger Accounting*. For more information, see [Selecting an Accounting Framework](#).

Before you run the Generate Accounting process, set up accounting event definitions and accounting rules. Processing includes only source transactions with active accounting event definitions to create subledger accounting events or accounting transactions and journal entries. If an accounting event is enabled for Public Sector Accounting, you must activate the relevant accounting rules to create accounting transactions and journal entries. For more information, see [Managing Accounting Events](#) and [Setting Up Accounting Rules](#).

**Note:** You must enable accounting event definitions for the FeeReceipts and FeeRefunds events to process source transactions in Code Enforcement. These events must also be enabled to support overpayments and payments made with multiple payment methods.

**Note:** If the source transaction is a cash reconciliation adjustment, accounting transactions are created at the time the reconciliation adjustment is made. However, batch processing is required to generate the resulting journal entries. If journal entries aren't created, verify that the ReconAdjustment event definition is enabled.

The transaction status of accounting transactions that are created without journals is *Created*. The status of accounting transactions after journal entries are generated is *Generated*. The Generate Accounting process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.

You set up and run batch processing on the Generate Accounting page, which you can access by selecting **Accounting > Generate Accounting**.

### Entering Generate Accounting Process Parameters

1. Access the Parameters tab on the Generate Accounting page.
2. Use the **Date From** and **Date To** fields to process source transactions such as payments or refunds made during the date range that require accounting. The system configuration determines which source transactions will be processed.

The payment or refund accounting date is based on the next available date in the accounting calendar. You can review the accounting details after processing on the Accounting Transactions page. For more information, see [Viewing Accounting Transactions](#).

## Scheduling the Process

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

Page Element	Description
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>

Page Element	Description
<p><b>By day</b></p>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

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

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

## Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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



## Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

### Viewing Journal Entries

Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- *Created*: Indicates that the journal has been created but not validated.
- *Error*: Indicates that the journal has one or more validation errors.
- *Valid*: Indicates that the journal has been validated and is ready to be exported.
- *Sent*: Indicates that the journal has been exported to a file that can be used to update an ERP system.

### Reviewing Accounting Lines

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
  - **Account**
  - **Division**
  - **Department**
  - **Fund**
  - **Function**
  - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

### Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.  
You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

## Exporting Journal Entries

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

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

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

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

### Entering Export Journals to ERP Process Parameters

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

Page Element	Description
<b>Mapping Name</b>	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see <i>Setting Up Data Format Exchange Maps</i> .
<b>All Open Periods</b>	Select to include journals for all open accounting periods.
<b>Specify Dates</b>	Select to include journals for a specific accounting date range.
<b>Accounting Date From</b> and <b>Accounting Date To</b>	Specify the range of accounting dates for which you are exporting journal entries.
<b>Select Ledgers</b>	Select the ledgers for which you want to export journal entries.

### Scheduling the Process

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

Page Element	Description
<b>Frequency</b>	Select how frequently you want to run the process. Values are:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<b>By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p>

Page Element	Description
	<p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<b>By date</b>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<b>Month</b>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

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

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

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

- On success
- On error
- On warning

You can remove any of these process notification conditions.

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

## Submitting the Process

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

## Processing the Journal Entry Output

Use the `publicSectorMappingAttachments` REST API to process the output file generated by the Export Journals to ERP. For more information on this REST API, see [REST API for Oracle Public Sector Cloud](#).



# 16 Working with Deposit Accounts

## Depositing Funds

Agency Staff and authorized users can track funds deposited into a deposit account.

Agency staff and authorized users can track funds deposited into a deposit account.

Agency staff with the manage deposit account privilege can record deposits received into a deposit account.

Authorized users with access to deposit can make deposits into a deposit account.

If checks are returned for lack of funds, agency staff with the manage account privilege can reverse the deposit recorded for a deposit account.

## Adding Funds to a Deposit Account

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Deposit Accounts page, click **Activity** in the left hand navigation.
3. Click **Add Deposit** and enter the deposit amount, and select an **Authorized User**.
4. Click **Submit**.
5. Select the payment method and continue to complete the payment.

## Reversing Funds

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Deposit Accounts page, click **Activity** in the left hand navigation.
3. Click the row for the deposit to reverse.
4. Click **Reverse Deposit**, select a reversal reason, and submit the reversal request.

## Importing Electronic Deposits

This feature provides an integration with Oracle Financials Cash Management and enables agency staff to import deposits received in the form automated clearing house (ACH) and wires and recorded in Oracle Financials Cash Management.

Use the scheduled process, Import Electronic Deposits for Deposit Accounts, to import automated clearing house ACH and wire deposits from Oracle Financials Cash Management.

For more information, see [Using the Process Monitor](#).

To import deposit activity from Oracle Financials, you have to:

- Configure a Cash Management lookup code. Add a lookup code 'TRSA' for the lookup type CE\_TRX\_TYPE. To add the lookup code 'TRSA' agency staff use the Manage Cash Management Lookups task under the Cash Management and Banking functional area in the Financials Setup menu.
- Link the Oracle Financials Cash Management bank account to a deposit account in the Funding and Security section of the Deposit Account Information page. For more information, see [Setting Up Deposit Accounts](#).
- Create an External Transaction in Oracle Financials Cash Management with a Transaction Type value of TRSA.

- Populate the deposit account number in the reconciliation reference field of the Bank Statement Line in Oracle Financials Cash Management.
- Reconcile the External Transaction and Bank Statement Line in Oracle Cash Management on a One to One (1-1) basis.

After you run the import, you can review the deposit on the Deposit Account Activity page for each deposit account.

## Paying Fees

Agency staff can pay fees with funds in a deposit account.

Applicants, primary contacts, or just contacts can pay fees with funds in a deposit account if they are authorized users on the deposit account and have access to pay fees.

For more information, see [Working with Fees and Payments](#).

## Running Autopay to Pay Fees with Deposit Account Funds

You can set up a process to record fee payments for deposit accounts.

1. Select **Billing and Payment > Deposit Account Autopay Fees**.
2. On the Parameters tab, confirm that **All Deposit Accounts** is selected and click **Submit**.

**Note:** The Autopay Fees with Deposit Account process was enhanced to evaluate if the prevent payment condition exists to determine fee payments made using deposit accounts. If the condition to prevent a payment is applied, the Autopay process will not process the payment of those fees using deposit accounts.

For more information, see [Using the Process Monitor](#).

## Reversing Fees

You can reverse fees that have been paid with funds in a deposit account.

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Activity tab, click **Reverse Fee**.
3. Select one or more fee items and click **Submit Reversal**. If you want to reverse fee items associated with a Payment Reference ID, search for that Payment Reference ID the before selecting the fee items.
4. Select a reason for the reversal and click **Submit**.

## Viewing Fees that are Payable by Authorized Users

This page lists the fees that can be paid by each authorized user with the balance in the trust account.

1. Select **Billing and Payment > Deposit Accounts**.
2. Click the **Fees Payable** tab in the left navigation to see the list of fees.

## Working with Bank Transfers

An agency may hold funds received for trusts/escrows/bonds in a separate bank account without co-mingling the funds with operational funds. When the agency has incurred a cost, it will communicate to the developer/contractor of



its intent to use the funds in trust/escrow/bond and specify the amount and purpose of use. An agency will become the owner of the monies held in trust/escrow/bonds and the developer/contractor relinquishes all legal and equitable interest for such amount immediately or after a stipulated period of time. In such events, the agency may move money from the bank account that holds deposit account funds to the bank account that holds the agency's operational funds for fees charged to the deposit account. This feature provides integration with Oracle Financials Cash Management and enables agency staff to create bank transfers to move monies.

Bank Transfers is an optional feature and can only be used if you have:

1. Implemented Oracle Financials Cash Management.
2. Configured bank accounts, business units, payment methods, and payment profiles in Oracle Financials Cash Management.
3. Linked the Oracle Financials Cash Management bank account to a deposit account in the Funding and Security section of the Deposit Account Information page. For more information, see [Setting Up Deposit Accounts](#).

## Submitting Bank Transfers

Here's how to submit a bank transfer.

1. Select **Billing and Payment > Bank Transfers**.
2. On the **Bank Transfers** page, review the withdraw amount column to see if there are funds eligible to transfer.
3. Click a row to review the withdraw amount by deposit account.
4. Click **Select Multiple** and choose the rows for which you want to submit the bank transfer.
5. Click the **Bank Transfer** button.
6. In the modal window, populate the destination bank account, business unit, payment method, payment profile and submit the bank transfer.

**Note:** Agency staff submitting the bank transfer should be aware of the payment methods and payment profiles associated with the bank account. Choosing incorrect values will result in a validation error.

## Refunding Account Balances and Fees

Agency staff can initiate refunds for balances in deposit accounts from the Deposit Account page for the full amount or a partial amount.

**Note:** Agency staff must ensure that all applicable fees have been charged to the deposit account before issuing a full refund of the account balance.

Agency staff can initiate fee refunds back to the deposit account from the Fees and Payments page on a Permit or planning application transaction.

Agency staff can also void a refund if the refund has been initiated incorrectly.

## Refunding Deposit Account Balances

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Deposit Accounts page, click **Activity** in the left hand navigation.
3. Click Initiate Refund, enter the Refund Amount and click **Submit**.

## Refunding Fees Back to a Deposit Account

When there is a downward adjustment of a fee after it has been paid with funds in a deposit account, agency staff can refund the excess fee payment to the deposit account.

You can initiate refunds of fees from the permit or planning application on the Fees and Payments page in the application details. Agency staff can:

- Manually choose the amount to refund or run the recalculation process to create a downward adjustment.
- Access the Refund History page and process the refund to refund it to the deposit account.
- View the fee refund on the Activity tab of the Deposit Account page.

For more information, see [Setting Up Deposit Accounts](#) and [Working with Fees and Payments](#)

## Printing Deposit Account Statements

You can print an account statement for a deposit account.

To print deposit account statements, agency staff has to configure following parameters for the Report ID DepositAccountStatement001:

- Parameter ID: 1  
Parameter Name: P\_DEPOSIT\_ACCOUNT\_NUMBER  
Parameter Data Type: String
- Parameter ID: 2  
Parameter Name: P\_TRANSACTION\_DATE\_FROM  
Parameter Data Type: Date
- Parameter ID: 3  
Parameter Name: P\_TRANSACTION\_DATE\_TO  
Parameter Data Type: Date

For more information about configuring report parameters, see [Setting Up Reports](#)

You print account statements from the Deposit Account page.

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Deposit Accounts page, click Account Information in the left hand navigation.
3. Click **Print** and enter the **Statement Period**.
4. Click **Done**. The generated deposit account statement 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.

# 17 Working with Processes

## Using the Process Monitor

The Process Monitor enables users to initiate and manage processes for 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="&gt;"/>
Generate Accounting	14306	Succeeded	SYSTEM_ADMIN	5/8/19 3:01 PM PDT	5/8/19 3:01 PM PDT	<input type="button" value="i"/> <input type="button" value="&gt;"/>

## Scheduling a New Process

1. Select **Common > Process Monitor**.
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the *Generate Accounting* process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.

**Note:** Processes can be run immediately or scheduled to run at a specific time. If you want to schedule a recurring process beyond 20 years into the future, the **End Date** must have a four-digit year. This requires updating the date format defined in the regional preferences. From the account menu, select **My Preferences**, click **View Advanced Preferences**, and select **Regional**. On the General Preferences: Regional page, you can update the **Date Format** to use a four-digit year.

6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

## Managing Processes

Select **Common > Process Monitor**.

The Process Monitor page displays information for each process in the following sortable columns:

- **Name**
- **Process ID**
- **Status**
- **Submitted By**
- **Submission Time**
- **Scheduled Time**

**Note:** The **Submission Time** and **Scheduled Time** columns use the time zone specified in the user's preferences, not the time zone for the agency.

Click **Filter By** to filter the displayed process information by *Name*, *Process*, and *Submission Time*.

You can manage processes using the following page elements:

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

# 18 Using the Digital Assistant

## Overview of Digital Assistant

Create your own digital assistant from scratch using your Oracle Digital Assistant instance and configure its parameters to suit your requirement before making it available for your users.

Create and add skills to your digital assistant. You can also use the Oracle delivered sample skills and re-configure its parameters, or clone the skill for the digital assistant you create.

Enable your digital assistant to provide generic information about processes or answer specific questions about your offerings, and enlist your own set of frequently asked question with answers.

## Asking Details

The delivered digital assistant skills, for example, facilitates responses and recommendations to questions raised by an anonymous user regarding the permitting process:

- With the PERMIT SEARCH skill, the digital assistant can access information from the Permit implementation and list the permits that match one of the search parameters – *Permit Number*, *Parcel ID*, and *Street*. Users can also review the permit detail page, if they want to look into a permit they just searched.
- With the PERMIT RECOMMENDATIONS skill, the digital assistant can access information from Oracle Intelligent Advisor and list permit recommendations. The skill prompts the user with questions from the Oracle Intelligent Advisor questionnaire and retrieves a list of recommended permits based on the user's responses to the questions.

For details on configuring your digital assistant for use, such as intents and the dialog flow, see the documentation [Configure for Use in a Digital Assistant](#).

## Asking Questions

Your digital assistant can store a list of questions and answers to be available as Frequently Asked Questions (FAQs) regarding the processes your agency follows.

The content for the FAQs are entered in a spreadsheet and attached to the digital assistant. The Oracle delivered spreadsheet can be updated with information from your knowledge-base.

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).



# 19 Using Accessibility Features

## Overview of Accessibility

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

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

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

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

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

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

## Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

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

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

## Using the Keyboard with Data Collections

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

### Tables

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



## Country

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

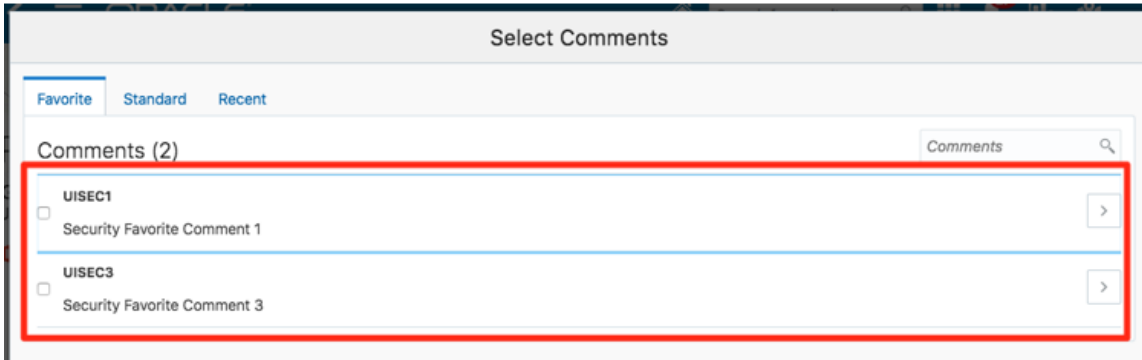
Page 1 of 22 (1-11 of 240 items) | 1 2 3 4 5 ... 22 >

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

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

## List View

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



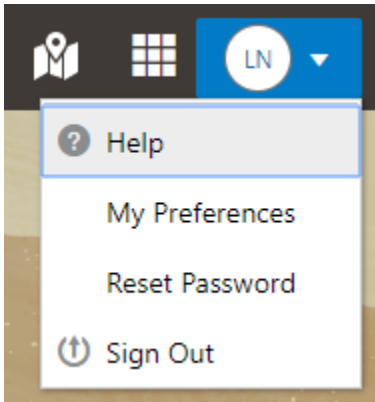
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the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

# Using the Keyboard to Work with Page Controls

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

## Buttons

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



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

## Calendar

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

Auto Number Rule | Electrical Permit 🔍

\* Valid from Date  📅

Valid to Date 📅

Public User Enabled

\* Department

Workflow Space Name

Workflow Application ID

< July 2018 >

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

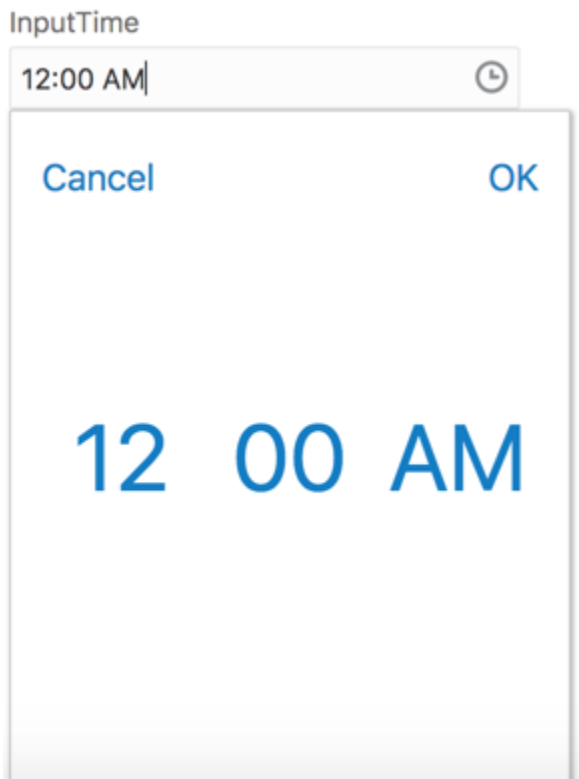
Today

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.

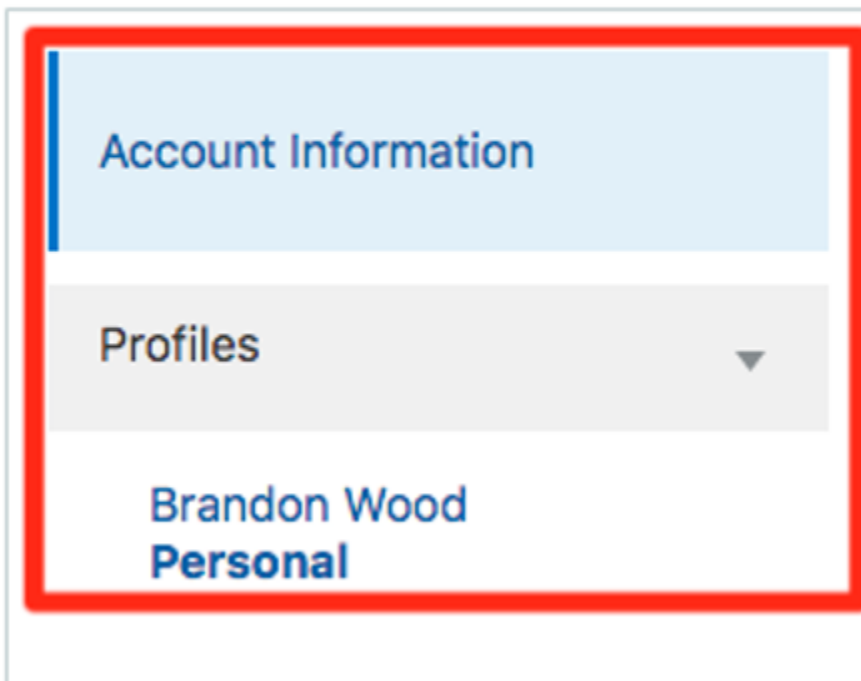
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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