

# Oracle Permitting and Licensing

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## **Using Business Licenses**

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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.

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 Create Account 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 selects 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.

## Entering Account Details

Here's how to create a new account.

Page Element	Description
<b>Hide contact information from public view</b>	<p>Turn on the switch to hide the registrant's 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>. Contact information can by default be viewed by the public.</p> <p><b>Note:</b> 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.

Page Element	Description
<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>
<b>Phone</b>	<p>Enter the country, phone number, and extension, if any. The <b>Country</b> field displays <i>US</i> for United States, and the prefix <i>+1</i> appears in the <b>Phone Number</b> field.</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 has enabled IVR access codes on the Public User Setup page. See <a href="#">Setting Up Public Users</a>.</p> <p>When you enable the <b>IVR Access Code</b> field, help information indicates that you can access permit and business license information and manage your inspection schedule by phone, but you need this 4-digit access code each time. If you forget the code, you can reset it on the account management page.</p>
<b>Additional Information</b>	<p>Enter a business name and your business title.</p>

After entering information and agreeing to the terms and conditions, if required, click the **Create Account** 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 **Read terms of use** link to open the **Terms of use** drawer. The drawer 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 and close the drawer to continue the registration process.

After the registrant accepts the terms and continues, the **Create Account** button on the information entry page is active. The link to the terms of use drawer is still available and can be accessed 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 **Create Account** button, a confirmation page provides instructions for completing the registration process. The instructions direct the user to check the confirmation email for relevant information.

The confirmation page also provides a registration ID number for reference in case the user needs to contact the agency for help. The registration number is the user's party ID.

These are the system actions and user steps that finalize the registration:

1. The system creates user account information in the Oracle Permitting and Licensing system and in the Fusion Applications system.
2. The system emails the user a link for completing the registration process.
3. The link takes the user to the Reset Password page in the Oracle Applications Cloud.

Although the page name suggests that the user is resetting a password, the user is actually creating a password for the first time.

4. The user enters a password and confirms it, then clicks the Submit button.
5. The system creates the password, completing the registration process.
6. The system transfers the user to the Oracle Permitting and Licensing landing page for registered public users.

The emailed link that the user clicked to access the Reset Password page includes the parameter that redirects the user to the appropriate page.

## Overview of Public User Accounts

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

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

### Account and Profile Data

Account information includes the following:

- Name: the name of the person who owns the account.
- Access: the email address that is entered during the registration process. This email address is used to log into the service. The user's interactive voice response (IVR) PIN for accessing inspection schedules is available if the agency requires an access code.

- **Additional Information:** whether the user's contact information is hidden from public view.

Your agency configures whether to give users these options:

- **Attachments:** documents that have been uploaded to the account.

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

- **Terms of Use:** the terms of use to which the user agreed.
- **Conditions:** restrictions that prevent certain actions or issue warnings when the actions are attempted.

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

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

- **Profile Basics:** the profile name, type, active/inactive status, and its designation as the profile for the account.
- **Profile Information:** the business name and business type if the profile includes business information.
- **Contact Information:** addresses, email addresses, and phone numbers.
- **Contacts:** people who might be added as contacts for applications that are associated with this person or business.

When adding contacts to an application, users can quickly pick contacts who are already associated with this person or business rather than having to manually add a new contact.

- **Licenses:** a list of licenses such as contractor licenses, the contractor status, and any related verification statuses.
- **Attachments:** documents that have been uploaded to the account.

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

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

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

## Accessing Public User Account Information

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

### Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

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

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

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

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

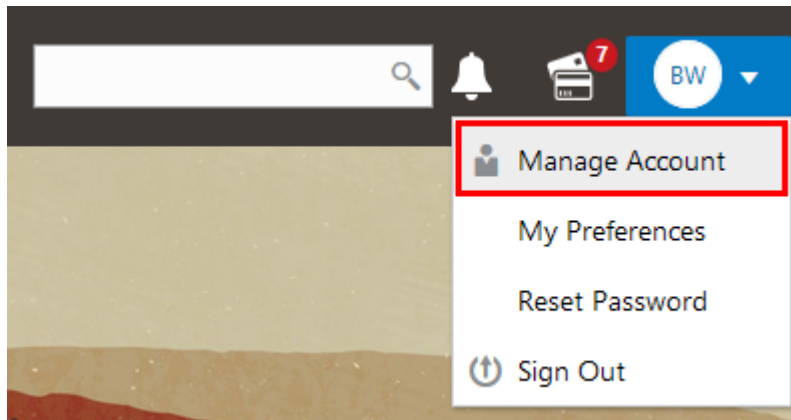
## Account Management Navigation for Registered Public Users

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

1. Sign in to access the registered public user landing page.
2. Click the account menu that appears with the user's initials in the page header.

A drop-down menu appears.

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



3. Select **Manage Account**.

## Managing Public User Accounts

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

Registered public users access the Manage Account page from the account menu in the page header. Agency staff access 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:

- 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 as a Registered Public User

Here's how you can manage the general account information entered during the registration process as a registered public user.

1. Log in with the email address you used during the registration process.
2. Click the account icon in the global header.
3. Click the **Manage Account** menu item.
4. On the Manage Account page, you can add or delete general account information. To delete an item, click the **Delete** trash can icon.

Page Element	Description
Name	Click the <b>Edit Name</b> pencil icon to open the <b>Edit name</b> drawer.  Update fields including first, middle, and last names, initials, suffix, and title. The <b>Display Name</b> is generated from the name fields.



Page Element	Description
<b>Access</b>	Click the <b>Edit Access</b> pencil icon to open the <b>Edit access</b> drawer.  Enter a number in the <b>IVR access code</b> field. The <b>User Name</b> and <b>Email</b> fields are display-only and reflect the email address entered during the registration process.
<b>Address</b>	Click the <b>Add Address</b> button to enter a home or business address. Turn on the <b>Default</b> switch to designate the address as the default selection.
<b>Phone</b>	Click the <b>Add Phone</b> button to enter a home, mobile, or work phone number. Turn on the <b>Default</b> switch to designate the phone number as the default selection.
<b>Email</b>	Click the <b>Add Email</b> button to enter a home or work email address. Turn on the <b>Default</b> switch to designate the email address as the default selection.
<b>Contacts</b>	Click the <b>Add Contact</b> button to enter information for an account contact, including name, business, email, street address, and phone.
<b>Conditions</b>	View conditions that have been applied to persons, parcels, contractors, or applications. Only agency staff can apply and resolve conditions.
<b>Terms of use</b>	Click the <b>Read terms of use</b> link to review the terms of use.

## Managing General Account Information as Agency Staff

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 <i>Setting Up Public Users</i>.</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 that can't be modified.

You can change the applicant to another active registered contact on the application and assign a different level of access to the *Previous Applicant*. The new applicant receives full application access. For more information, see [Changing the Applicant on an Application](#).

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 inspections, inspection comments, and inspection checklists.
- Schedule 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 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

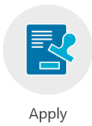
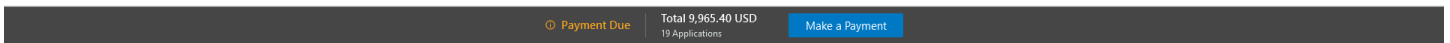
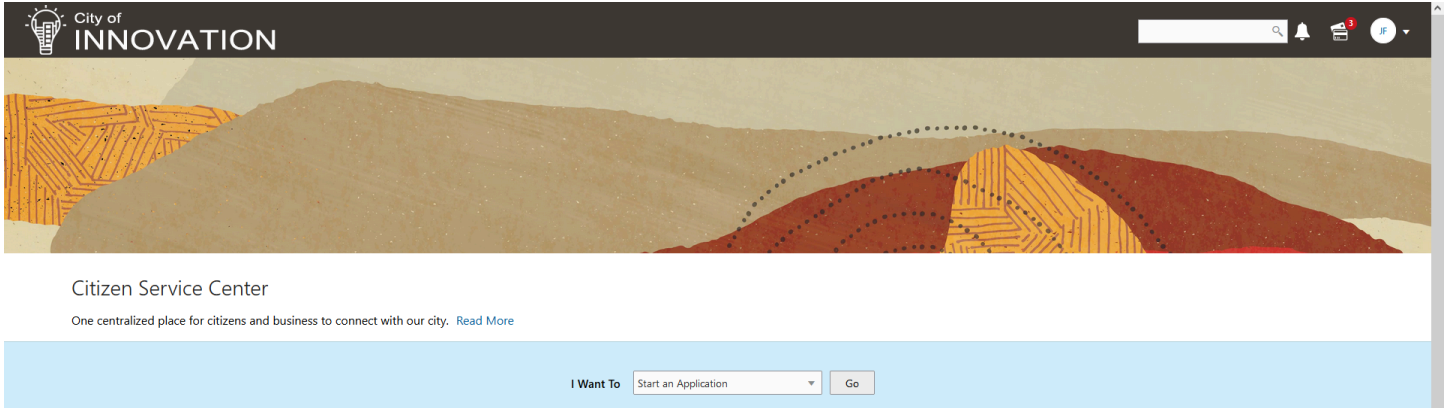
The applicant is the primary contact unless the applicant selects a different primary contact on the application form or after the application is submitted. A contact with any contact type can be a primary contact. Primary contacts always have the same access to an application as the applicant, including 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.

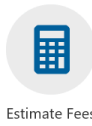
## Overview of Public Landing Pages

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](#).



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:

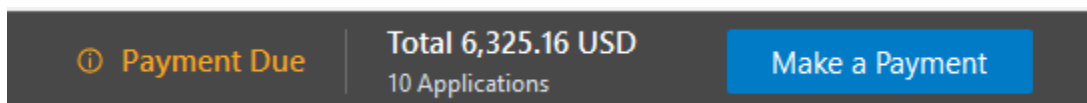
Menu Link	Description
<b>Report an Issue</b>	<p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.</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>	<p>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.</p> <p>Owners of deposit accounts can void the invite.</p> <p>Invited users can accept or decline the invite.</p>

## The Make a Payment Banner

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

This example illustrates the Make a Payment banner.



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

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

## The Digital Assistant Button

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

This image shows the digital assistant button.



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

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



# 3 Applying for a Business License

## Choosing an Application Type

Your agency sets up application types for permit applications, planning applications, 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.

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 for Business Licenses on the City of Innovation website. The page is divided into a left sidebar and a main content area. The sidebar contains a search bar, a list of application categories (Business Licenses, Permits, Planning Applications, Guide), and a link to 'View Recommendations Recent and Popular'. The main content area is titled 'Business Licenses' and features a 'Clear Selection' button and an 'Apply: 1' button. Below the title, there are three sections: 'Business Coaching', 'Business Licenses', and 'Contractor Registration'. The 'Contractor Registration' section is expanded, showing a checked checkbox for 'Contractor Registration' and two unchecked options: 'Single Contractor Registration' and 'Multiple Contractor Registration'. Each option has a brief description of the form it leads to. A chat icon is visible in the bottom right corner of the page.

**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](#)

## Business Licenses

Clear Selection Apply: 1

- Business Coaching**  
The City and its partners offer coaching for new entrepreneurs and seasoned business owners looking to start, operate or expand their business. Our business coaches will help you navigate the steps for business tax registration, plan review, permitting and inspection. Complete a pre-meeting survey to schedule a meeting for your business needs.
- Business Licenses**  
We are excited to welcome your business venture to our city and stand ready to assist you in your success. Before you begin your business license application, we invite you to schedule a business consultation to learn about the available services, and resources that we hope will be beneficial to your business.
- Contractor Registration**
  - Contractor Registration   
All contractors are required to register with the Town prior to commencing work
  - Single Contractor Registration  
Use this form to apply for a single contractor registration
  - Multiple Contractor Registration  
Use this form to apply for multiple registration in a single application



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*.

## Browsing for Business Licenses Application Types

When you are searching for Business Licenses applications, you have an option to apply for multiple applications at the same time. During the data entry, this allows you to enter common information for the selected applications together in a **General Information** section.

- Click the button for **Business Licenses** 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 Business Licenses transaction.
- Expand the Business Licenses category and select the check boxes for the applications.  
**Note:** The order in which you select the check boxes for the application will be the order in which the data entry pages for the applications are displayed.

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*.

- Click the **Apply** button. The **Apply** button displays the number of applications you have selected to apply.

Use the **Clear Selection** button to remove all current selections and start over.

For information on filling out multiple applications, see *Completing a Single Application for Multiple License Types*.

## Using a Guided Questionnaire to Get Application Type Recommendations

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

To find application types using a guided questionnaire:

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

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

2. Step through the questionnaire.

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

3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

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

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

An anonymous user follows these steps to save the recommendations:

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

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

## Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

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

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

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

1. Access the Apply page.

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

## Estimating Fees

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

### Estimating Fees Using A Simplified Intake Form

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

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

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

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

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

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

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

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

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

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



## Completing an Application

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

Applications for business license 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.

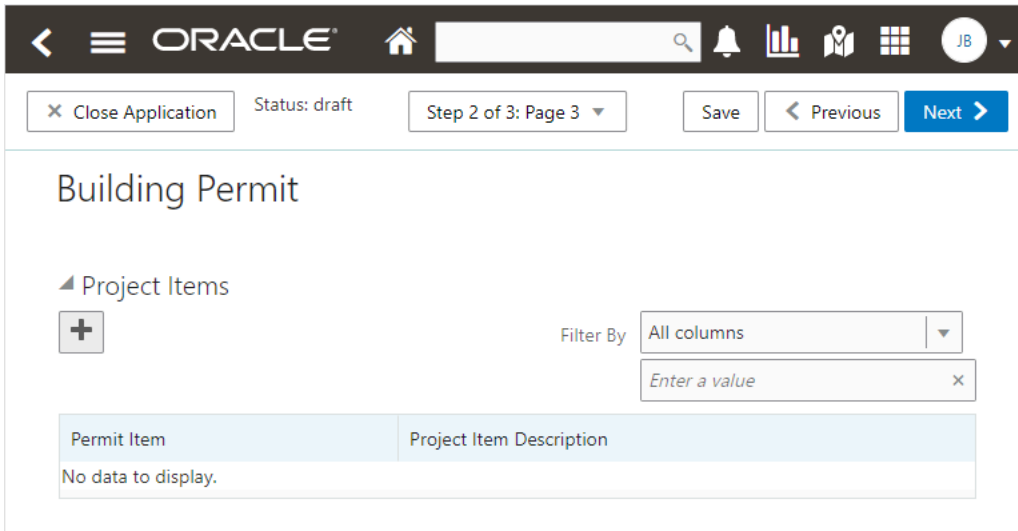
The application begins with data entry steps that the agency configures. There can be one or many data entry steps. Agencies configure the sections and fields for each data entry step. For more information, see [Intake Form Designer Topics](#). See [Using Predefined Field Groups](#) for more information 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.



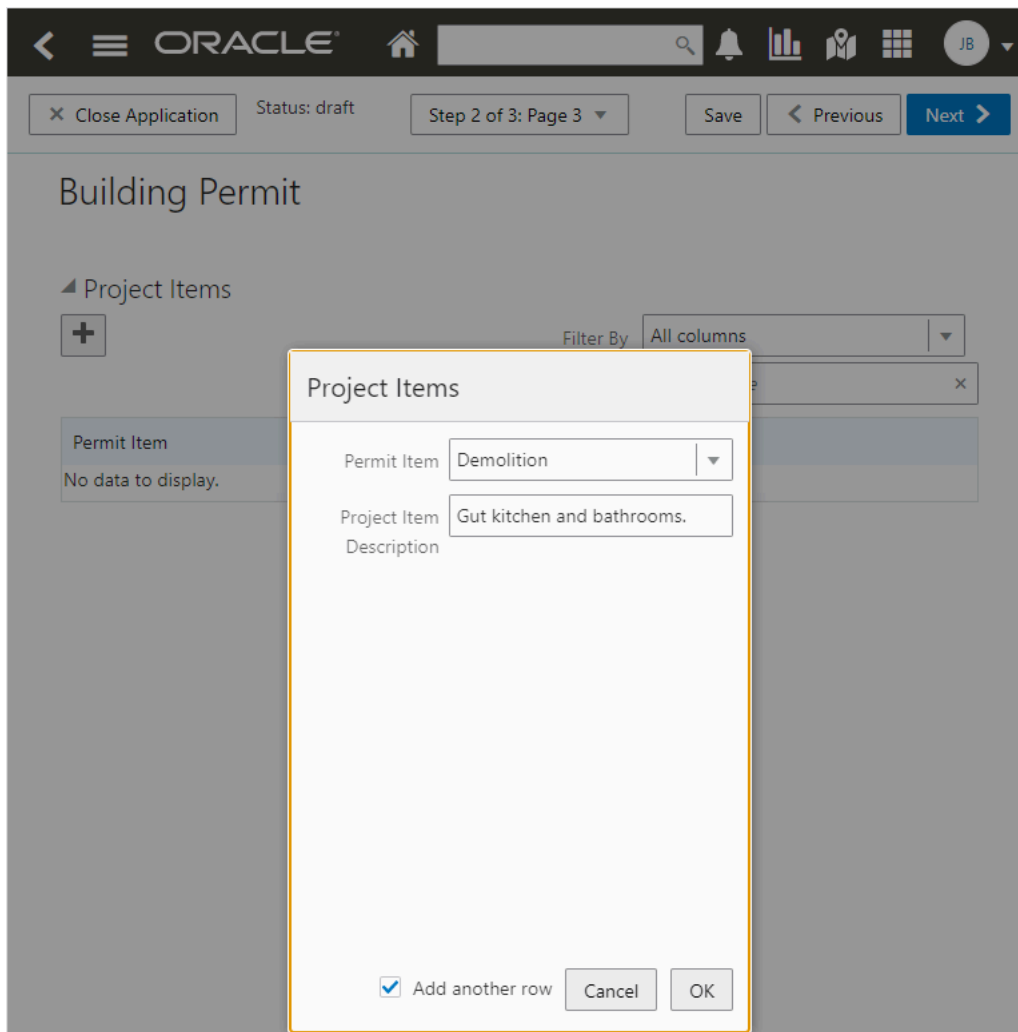
To add data to a grid:

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*.

## Applying for Future-Dated Business Commencement

Depending on the agency setup, applicants can submit their origination, renewal, or amendment license applications with a proposed effective date that is in the future.

When processing the application the assigned specialist can approve it or enter a new approval date, which is the license issue date. This date will override the applicant’s proposed date. The **Approved Effective Date** field must be made available only to agency staff and the same date is used for expiration date calculations. The license status will automatically change to *Active* on the approved effective date.

The following table illustrates the approved effective date that the system uses based on the dates entered by the applicant and the agency staff:

Business Start Date - applicant	Approved Effective Date - staff	Approved Effective Date – applied by the system
Applicant enters future date	Specialist enters new date	Specialist entered date
	Specialist leaves the field blank	Applicant entered date
Applicant leaves the field blank	Specialist enters new date	Specialist entered date
	Specialist leaves the field blank	Application processing date

See *Viewing Business Application Information*.

## 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.

### 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.

If there are multiple *Doing Business As* at the same location, an applicant can use the **Add DBA** button on the Select Location modal screen to enter DBA related information and default all the other location information from the existing record.

- 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. Click the **Submit** button after paying any applicable fees.

Your agency can configure a Business Rules Framework event to automatically stop the submission process and display a message describing the reason for stopping the process.

Agencies configure stop process actions in the Business Rules Framework. You use the following events to configure the business rule for business license, permit, and planning applications:

- *Before Business License Application Submitted*
- *Before Permit Application Submitted*
- *Before Planning and Zoning Application Submitted*

For details, see [Setting Up Stop Process Actions](#).

## Entering Contractor Information

Applicants or contractors add contractor licenses to a business license application or contractor registration, depending on the intake form design. After contractor license information has been collected, it's processed and added to the transaction details, agency-maintained list of approved contractors, and business licenses.

The application requires at least 1 contractor license on the application, depending on the agency configuration of the **Contractor** field group in the intake form designer. For more information about setting up this validation, see [Using Predefined Field Groups](#). Applications using the *Contractor Registration* subclassification always require a contractor license.

Contractors on business license applications can select more than 1 contractor contact, and for each contact indicate whether each contact is the license holder or an authorized agent.



Contractors can add new contacts or select contacts from a list when filling out contractor licenses on applications. When filling out contractor licenses on applications, contractors can enter the contractor license, and if it already exists in the agency's system, the information is retrieved automatically. However, the agency may require contractors to select licenses from the agency's list of approved contractors instead.

To add a contractor associated with a business license transaction or contractor registration, the contractor fills out and submits the agency's intake form as described here. The form can be the origination application or registration, or a renewal or amendment, depending on the agency setup.

1. Click **Add Contractor**.
2. Depending on the agency setup for the business license type, you may be required to select a contractor license from the agency's approved contractor license list. If that's the case, click **Select** and choose a contractor license. For more information about selecting a contractor license from the agency's list of approved contractors, see *Working with Contractors and Agents in Applications*.
3. Your agency may require you to manually enter contractor license information. This is only available for business license applications or contractor registration. In that case, you are required to enter information for 1 contractor license at least. Depending on the agency setup, the form may allow you to enter more than 1 contractor license.

If you enter a license and it matches license information in the agency's list of approved contractors, the information is brought into the application.

Fill out these fields for completing contractor registration or a business license application on the Contractor page:

**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.

Section Name	Description
<p><b>License</b></p>	<p>Search the approved contractor list by providing the license number and clicking the <b>Get Details</b> button.</p> <ul style="list-style-type: none"> <li>○ <b>License Number:</b> Indicates the license number. If you have an authorized license with the agency, the license information will appear in the form. If the license number is not found, provide your license number to register the license with the agency. If you are applying for a contractor license with the agency, leave the license number blank.</li> <li>○ <b>Issue Date:</b> Enter the date on which the license was issued.</li> <li>○ <b>Expire Date:</b> Enter the date on which the license expires.</li> </ul>
<p><b>Contractor</b></p>	<p>Select the type of contractor.</p> <ul style="list-style-type: none"> <li>○ <b>License Type:</b> From the drop-down list, you can select the type of license.</li> </ul> <p><b>Note:</b> Your agency sets up license types on the License Types tab of the Contractor Setup Options Details page. If you have enabled the integration to an external site on the Contractor Setup Options Details page, the agency must add a row with the value of <i>LICENSE</i>. For more information, see <i>Setting Up Contractor License Options</i>.</p>

Section Name	Description
<p><b>Business</b></p>	<p>Provide the business information in this section.</p> <p>If you're selecting a contractor license from the agency's list of approved contractors, the business name, address, and ownership type are automatically entered for you.</p> <p>If you're registering your license with the agency and it doesn't exist in the agency's contractor list yet, then the information in the <b>Business</b> section is picked up from the business details page; you can modify it here.</p> <ul style="list-style-type: none"> <li>○ <b>Business Name:</b> Indicates the business name.</li> <li>○ <b>Owner Name:</b> Indicates the owner's name.</li> <li>○ <b>Ownership Type:</b> From the drop-down list, you can select the type of ownership.</li> </ul> <p><b>Note:</b> Your agency sets up ownership types on the Ownership Types tab of the Contractor Setup Options Details page.</p> <ul style="list-style-type: none"> <li>○ <b>Country:</b> Indicates the country.</li> <li>○ <b>Postal Code:</b> The postal code of the location.</li> <li>○ <b>Address Line 1:</b> The first line of the location's address.</li> <li>○ <b>Address Line 2:</b> The second line of the location's address.</li> <li>○ <b>Phone:</b> Indicates the phone number.</li> <li>○ <b>Ext:</b> The phone extension number.</li> <li>○ <b>Email:</b> Indicates the email address.</li> </ul>
<p><b>Classifications</b></p>	<p>View the classifications details.</p> <ul style="list-style-type: none"> <li>○ <b>Code:</b> From the drop-down list, you can select the classification code.</li> </ul> <p><b>Note:</b> Your agency sets up classifications on the Classifications tab of the Contractor Setup Options Details page.</p>
<p><b>Contractor Bond</b></p>	<p>Provide a contractor bond or assigned savings account of the contractor.</p> <ul style="list-style-type: none"> <li>○ <b>Company Name:</b> Indicates the company name.</li> <li>○ <b>Policy Number:</b> Indicates the policy number.</li> <li>○ <b>Amount:</b> Indicates the bond amount.</li> <li>○ <b>Effective Date:</b> Enter the effective date of the contractor bond.</li> <li>○ <b>Cancellation Date:</b> Enter the cancellation date of the contractor bond.</li> </ul>
<p><b>Other Bonds</b></p>	<p>Enter the details of other bonds.</p>

Section Name	Description
	<ul style="list-style-type: none"> <li>○ <b>Qualifier Name:</b> Indicates the qualifier name.</li> <li>○ <b>Company Name:</b> Indicates the company name.</li> <li>○ <b>Policy Number:</b> Indicates the policy number.</li> <li>○ <b>Amount:</b> Indicates the bond amount.</li> <li>○ <b>Effective Date:</b> Enter the effective date of other bonds.</li> <li>○ <b>Cancellation Date:</b> Enter the cancellation of other bonds.</li> </ul>
<b>Workers' Compensation</b>	<p>Enter the workers' compensation details.</p> <ul style="list-style-type: none"> <li>○ <b>Insurance Type:</b> From the drop-down list, you can select the type of insurance.</li> </ul> <p><b>Note:</b> Your agency sets up insurance types on the Insurance Types tab of the Contractor Setup Options Details page.</p> <ul style="list-style-type: none"> <li>○ <b>Company Name:</b> Indicates the company name.</li> <li>○ <b>Policy Number:</b> Indicates the policy number.</li> <li>○ <b>Effective Date:</b> Enter the effective date of the worker's compensation.</li> <li>○ <b>Expiration Date:</b> Enter the expiration date of the worker's compensation.</li> <li>○ <b>Cancellation Date:</b> Enter the cancellation date of the worker's compensation.</li> <li>○ <b>Suspend Date:</b> Enter the suspend date of the worker's compensation.</li> </ul>
<b>Contact Persons</b>	<p>Provide the list of authorized contacts for the contractor license. The applicant is automatically copied as a contact for the contractor license.</p> <ul style="list-style-type: none"> <li>○ Indicate whether the contact is the license holder or an authorized agent.</li> <li>○ Select the contact type.</li> <li>○ Enter the name, business, and title of the contact person.</li> <li>○ Enter the contact information, including address, phone, and email address.</li> </ul>

4. Click **Done** to save and close the contractor details or click **Cancel** to discard the changes.

After the business license or contractor registration is submitted, the agency staff manually reviews the application, completes the workflow, and approves the contractor license. When the business license or contractor registration is complete, the contractor's license and authorized contact information is added to the agency's contractor license list.

**Note:** Applicants can't delete the license they added as part of the requirements for the application; only administrators can delete the license after the application is submitted. Inactivating contacts, deleting contacts, or deleting contractor licenses on the contractor registration or a contractor's business license don't update the agency-maintained contractor license list.

The contractor licenses that have been submitted through contractor registration with the agency can be maintained along with business licenses, utilizing the expiration, renewal, and amendment processes.

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

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

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

## Completing a Single Application for Multiple License Types

This topic describes how to fill out a single application that includes multiple license types selected on the Apply page.

**Note:** This feature is available for Business Licenses only.

### Overview

If your agency has enabled the option to enable applicants to select multiple business license types to apply for on the Apply page, you can use a single intake form to fill out and submit multiple license applications. With a single intake form, you can fill out information common to all the selected applications in a General Information section of the intake form, streamlining the application process.

### Selecting License Types

On the Apply page, applicants can select multiple license types to include in the single intake form.

The number of license types selected is reflect in the **Apply** button.

**Note:** The order in which you select the license types determines the order in which they appear in the single intake form.

## Business Licenses

Clear Selection

Apply: 2

### ▶ Business Coaching

The City and its partners offer coaching for new entrepreneurs and seasoned business owners looking to start, operate or expand their business. Our business coaches will help you navigate the steps for business tax registration, plan review, permitting and inspection. Complete a pre-meeting survey to schedule a meeting for your business needs.

### ▲ Business Licenses

Catering Business License



Business Tax Registration for Catering Business License [Learn More](#)

Commercial Rental Business License



Business Tax Registration for Commercial Real Estate Rental Properties [Learn More](#)

Residential Rental Business License



Business Tax Registration for Residential Real Estate Rental Properties [Learn More](#)

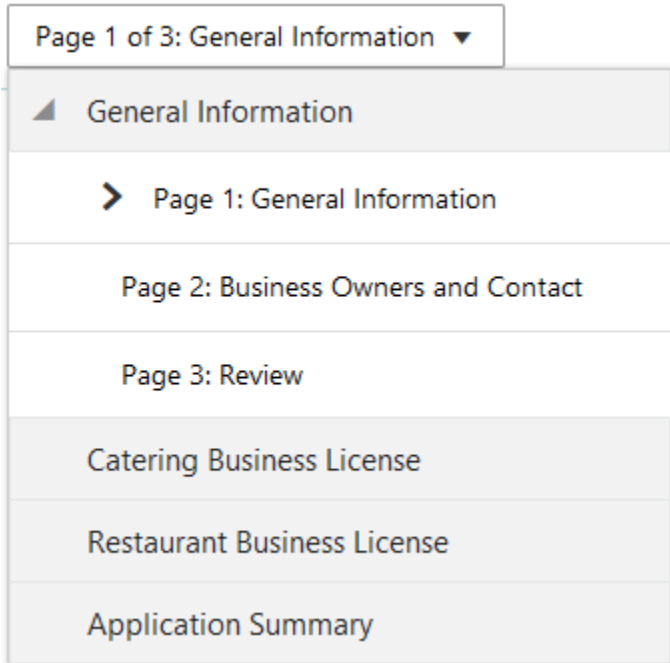
Restaurant Business License



Business Tax Registration for Restaurant Business License [Learn More](#)

## Navigating Within a Single Intake Form

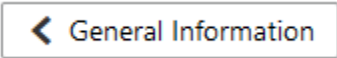
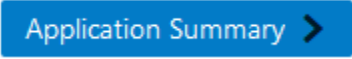
Use the navigation drop-down list to view the structure of the single intake form and to navigate within it.



The chevron symbol indicates which page you are currently viewing, with each section displaying the selected page <x> of <n>."

**Note:** Individual intake forms display the term *Step* instead of *Page*.

Page Element	Description
General Information	<p>The General Information section appears at the top of the form navigation. This section contains the information that is common to all the selected license types. Entering common information here means you don't have to enter it for each license type.</p> <p><b>Note:</b> When the list of contacts is in the general information, contractor contacts that are added in the contractor section appear in the list of all contacts only after application submittal. This applies only to the origination application.</p>
Review page	The Review page is where you can review and edit the information you've entered for a General Information section or an individual license type.
Selected license types	The licenses types you selected on the Apply page appear below the General Information section in the order you selected them. Fill out each license type application just as you would a standalone license type application.
Application Summary	The Application Summary page enables you to view the progress of the application process. See "Using the Application Summary" below.

Page Element	Description
	When in the first page of the first license type within the single intake form, click this button to return to the General Information section.
	When on the Review page of the last application in the single intake form, click to go to the Application Summary page.
<b>Save</b>	<p>The <b>Save</b> button appears for the General Information section only after you've saved one of the business license type applications.</p> <p><b>Note:</b> As you navigate from one form to another, you trigger an automatic save.</p>






## Using the Application Summary

Use the Application Summary page to monitor the progress of the application, make edits, or remove a license type if it's no longer necessary.

**Note:** The General Information section can't be removed. If you remove an application, the specific application will be set to void if it was saved.

✕ Close Application
Application Summary ▾
Save
◀ Previous
Submit






### Application Summary

General Information	<span style="background-color: #007060; color: white; padding: 2px 5px; border-radius: 3px;">In Progress</span>	
Catering Business License <small>Record ID BusLic-JUN2023-0127</small>	<span style="background-color: #007060; color: white; padding: 2px 5px; border-radius: 3px;">In Progress</span>	 
Restaurant Business License <small>Record ID BusLic-JUN2023-0128</small>	<span style="background-color: #007060; color: white; padding: 2px 5px; border-radius: 3px;">In Progress</span>	 

If there are any issues, such as missing or invalid information, you will see notifications on the Application Summary page describing what needs to be resolved before submitting the application.

✕ Close Application Application Summary ▾ Save ◀ Previous Submit

## Application Summary

General Information	In Progress	
Catering Business License Record ID BusLic-JUN2023-0127	In Progress	 
Restaurant Business License Record ID BusLic-JUN2023-0128	In Progress	 

**! Correct the Following Errors Before You Submit**

1. Correct the highlighted fields.
2. You must enter all of the required credentials fields.

The status displayed include:

- *Not Started*
- *In Progress*

## Working with In-Process Applications Within a Single Intake Form

While you are working on a single intake form it's common to leave the form to gather information and return at a later time. Access the single intake form from your Applications list by clicking any of the pending license types you included in your single intake form.



# Applications

Business Licenses		Permits	Planning Applications	All
Apply		Created	Last 30 days	<input checked="" type="checkbox"/> Show All Statuses
<b>BusLic-MAY2023-0111</b> Restaurant Business License	Hannah's cakes 2200 Otis Dr, Alameda, California 94501	Origination <b>Pending</b> Expires on 6/16/23		
<b>BusLic-MAY2023-0110</b> Catering Business License	Hannah's cakes 2200 Otis Dr, Alameda, California 94501	Origination <b>Pending</b> Expires on 6/16/23		

When an inactive pending application expires, it is automatically removed from the group and set to a status of void. You can't copy a pending application that's part of a single intake form.

## Managing Submitted Applications

Once you submit a single intake form, you can't return to the single intake form and access your previously selected business license types. After submission, you manage each of the selected license applications separately. You can access the individual license types from the Transactions > Business Licenses page the same as a standalone application, where you'll pay fees, monitor, and update the license application as needed.

### Transactions

Business Licenses		Permits	Planning Applications	All		
Apply		Last updated	Last 30 days	<input type="checkbox"/> Show All Statuses		
<input type="text" value="Search"/> <input type="button" value="Filter"/> <input type="button" value="Grid"/> <input type="button" value="Location"/>						
License	Business Information	Description	Activity	Assigned	Fees	Actions
<b>BusLic-JUN2023-0128</b> Restaurant Business License	Blue Water Cafe 1428 Walnut Street, ALAMEDA, California 94501		Origination <b>Payment pending</b> Expires on 7/8/23		Fees 54.00 USD Balance 54.00 USD	
<b>BusLic-JUN2023-0127</b> Catering Business License	Blue Water Cafe 1428 Walnut Street, ALAMEDA, California 94501		Origination <b>Payment pending</b> Expires on 7/8/23		Fees 54.00 USD Balance 54.00 USD	

## 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

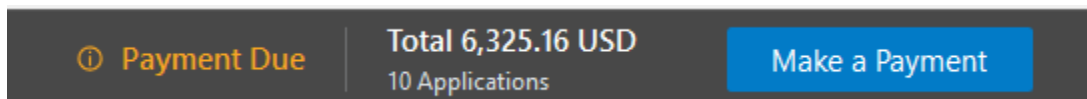
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

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.

<input type="checkbox"/> Select All	Application	Property	Description	Primary Contact	Amount
<input type="checkbox"/>	<b>RESADD-2021-00039</b> Residential Addition	1230 WALNUT ST, ALAMEDA, California, US	Addition over the garage	Peter Skate	655.00 USD <i>Processing payment</i>
<input type="checkbox"/>	<b>RESADD-2021-00052</b> 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"/>	<b>RESADD-2021-00071</b> Residential Addition	1100 WALNUT ST, ALAMEDA, California, US	Renovation of patio	Peter Skate	100.00 USD <i>Processing payment</i>
<input checked="" type="checkbox"/>	<b>RESADD-2021-00070</b> Residential Addition	1100 Walnut Street, ALAMEDA, California, US	Upper floor modification	Peter Skate	123.00 USD
<input checked="" type="checkbox"/>	<b>RESADD-2021-00076</b> Residential Addition	1100 WALNUT ST, 3267, ALAMEDA, California, US, 94501		Peter Skate	570.60 USD
<input checked="" type="checkbox"/>	<b>PLMB-2021-00010</b> Plumbing	3267 CENTRAL Ave, 3267, ALAMEDA, California, US, 94501		William Brown	50.05 USD

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 Checkout page or the Deposit Account Payment page to continue with the payment.  <b>Note:</b> If the agency has enabled the use of third-party payment options, then a <b>Payment Choice</b> modal is displayed, on clicking the <b>Continue</b> button. The available options include <i>Cash, Credit card, Debit card, Offline, PayPal</i> and <i>All other payment methods</i> . Select to pay with either of the available payment options.  For more information, see <a href="#">Setting Up Agency Payment Options</a> and <a href="#">Setting Up Third-Party Payments</a> .

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**.

**Note:** If the agency has enabled the use of third-party payment options, then a **Payment Choice** modal is displayed, when the agency user clicks the **Continue** button. The available options include *Cash, Credit card, Debit card, Offline, PayPal* and *All other payment methods*. Select an option to continue with the payment. For more information, see *Setting Up Agency Payment Options* and *Setting Up Third-Party Payments*.

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>	Turn on this switch to select a customer's deposit account from the Account drop-down list, to make the payment.  <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.
<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>	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 type of application, such as <i>Residential Addition</i> , appears under the application number.  If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see <i>Applying Conditions to Applications</i> .
<b>Property</b>	View the location of the property for the application.

Page Element	Description
<b>Description</b>	View a description of the application.
<b>Primary Contact</b>	View the primary contact for the application.  For information on how to add contacts and change the primary contact, see <i>Working with Application Contacts</i> .
<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 Checkout page or the Deposit Account Payment page to continue with the payment.

## Making Payments for Multiple Business Applications

If you have configured your agency settings and your business license types and forms for single intake, the payment for business applications can be made using the **Make Payments** tile on the Agency Springboard and access the Make Payments page. They can process payments for multiple applications from the Make Payments page.


## 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.
	Use the increment and decrement buttons to increase or decrease the number of new copies.

Page Element	Description
	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> .

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>	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.  <b>Note:</b> Registered public users can't change the applicant.
<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.
	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>
<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>



Page Element	Description
<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 <i>Completing an Application</i> and <i>Viewing Business Application Information</i>.</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.



# 4 Using the Agency Springboard and the Task List

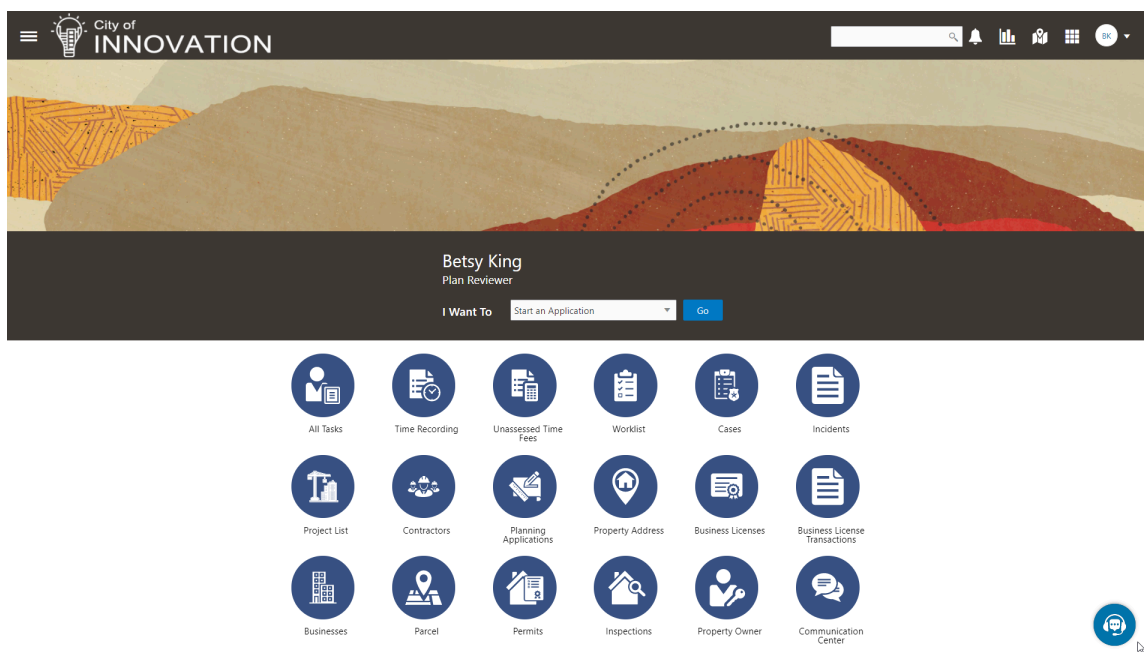
## Using the Agency Springboard

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

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

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

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









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



## Global Header

The global header appears:

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

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

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

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

## Alerts

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

## Quick Actions (I Want To)

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

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

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

## Tiles

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

## 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 business license lifecycle
- The contractor license lifecycle
- 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 PSC Plan Reviewer

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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.
<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.

Page Element	Description
<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>Retail Business License</i> , and so on.
<b>Application 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>Relationship Type</b>	Displays the type of relationship such as primary application or subapplication.
<b>Relationship Details</b>	Displays the detail of the application that is associated to the application. Click the link to access the application.
<b>Assigned To</b>	Displays to whom the task is assigned.
<b>Assigned Date</b>	Displays the date on which the task was assigned.
<b>Actions</b>	Click to display the actions you can take for that task, such as <i>Claim</i> , <i>Reassign</i> , and so on.
>	Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.

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

## Viewing Additional Transaction Information

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



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

## Using the Business License Worklist

The business license worklist provides a central location for performing license-related activities. Separate tabs list unassigned applications, applications that are assigned to the current user, and activities and workflow tasks that are assigned to them.

Access the worklist by clicking the **Business License 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 business license worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Unassigned Applications	<p>Business license applications that do not have an assigned specialist.</p> <p>Subtabs to Unassigned Applications:</p> <ul style="list-style-type: none"> <li>• Consultation Applications</li> <li>• Origination Applications</li> <li>• Amendment Applications</li> <li>• Renewal Applications</li> </ul> <p>This tab includes a map view for displaying application locations.</p>	<p><b>Assign</b></p> <p>Individual: Click the Actions menu for the application row and select Assign. On the Assign Specialist page, select a specialist and click Save.</p> <p>Bulk: Click the Multiple Select button and select the applications using check boxes. Click the Assign button to open the Assign Specialist page. Select the specialist and click Save.</p> <p><b>Claim</b></p> <p>Individual: Click the <b>Actions</b> menu for the application row and select Claim.</p> <p>Bulk: Click the Multiple Select button and select the applications using check boxes. Click Claim.</p> <p><b>Copy Application</b></p> <p>Click the Actions menu for the application row and select Copy Application. Select the desired options on the Copy Application page and click Save. A new</p>	<p>This tab is visible only to users who have the Business License Specialist (ORA_BL_SPECIALIST) Job Function assignment.</p> <p>Assigning an application removes it from this tab and appears on the assigned specialist's My Applications tab.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <a href="#">Applying Conditions to Applications</a></p>

Tab	Displays	Available Actions	Additional Information
		<p>application form opens with values prefilled. See <i>Copying an Application</i>.</p> <p><b>Cancel Application</b></p> <p>Click the Actions menu for the application row and select Cancel Application. Enter a reason for the cancellation and click OK. The application form gets removed from the worklist.</p> <p>The <b>Cancel Application</b> action is available only for the applications in the <i>Pending</i> status.</p> <p><b>Withdraw Application</b></p> <p>Click the Actions menu for the application row and select Withdraw Application. Enter a reason for the withdrawal and click OK. The application form gets removed from the worklist.</p> <p>The <b>Withdraw Application</b> action is available from the submission of the application until its completion. The statuses in which an application can be withdrawn are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i></li> <li>• <i>In process</i></li> <li>• <i>Inspection</i></li> <li>• <i>License issuance</i></li> </ul>	
My Applications	<p>Submitted and In Process business license applications that are assigned to the current user.</p> <p>Subtabs to My Applications:</p> <ul style="list-style-type: none"> <li>• Consultation Applications</li> <li>• Origination Applications</li> <li>• Amendment Applications</li> <li>• Renewal Applications</li> </ul> <p>Comments and attachments pertaining to this application.</p> <p>This tab includes a map view for displaying application locations.</p>	<ul style="list-style-type: none"> <li>• <b>Send Message</b></li> </ul> <p>See <i>Working with Communications</i>.</p> <ul style="list-style-type: none"> <li>• <b>Reassign</b></li> </ul> <p>See <i>Working with Specialists</i>.</p> <ul style="list-style-type: none"> <li>• <b>Copy Application</b></li> </ul> <p>See <i>Copying an Application</i>.</p> <ul style="list-style-type: none"> <li>• <b>Update Description</b></li> </ul>	<p>Review or add your own comments and attachments.</p> <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,</p>

Tab	Displays	Available Actions	Additional Information
			<p>including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <a href="#">Applying Conditions to Applications</a></p>
Incoming Tasks	<p>All active applications assigned for the group.</p> <p>Subtab for Incoming Tasks:</p> <p>My Tasks</p> <ul style="list-style-type: none"> <li>Assigned Today</li> <li>Assigned Earlier</li> </ul>	<p>If the incoming task is for the group then the specialist has the following actions:</p> <ul style="list-style-type: none"> <li><b>Claim</b></li> <li><b>Reassign</b></li> </ul> <p>If the task is already assigned to the logged in specialist, then the specialist has the following actions:</p> <ul style="list-style-type: none"> <li><b>Update</b></li> <li><b>Release</b></li> <li><b>Reassign</b></li> <li><b>Withdraw</b></li> </ul>	<p>If you update the task by assigning or reassigning to another specialist, the workflow task – <b>Assign Specialist</b> will be updated to the Specialist Assigned status using the Business Rules Framework configuration.</p> <p>When you withdraw a task for a record, the workflow activity is updated accordingly.</p> <p>For more details, see <a href="#">Using Workflow</a>.</p>
Calendar	Shows the meeting schedules for the agency on a calendar or on a list.	<ul style="list-style-type: none"> <li>View consultation meetings assigned to the specialist 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 all consultation meetings.</p> <p>See the section <a href="#">Viewing Meetings on the Calendar</a> in <a href="#">Working with Meetings</a>.</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 business license 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.



# 5 Managing Business License Applications

## Managing Business License Transactions

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

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

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

Use the Transactions page to:

- View a summary of business license transactions, including consultations and contractor registration.
- Access details about a business license transaction.
- Apply for a business license on behalf of an applicant.
- Copy an existing business license application, permit, planning application, or a preapplication into a new application.
- View the conditions applied on the business license applications, if any.
- Manually enter fee payments on behalf of an applicant.

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

## Security Details for Managing Business Information

Administrators manage their user role assignments, which determine access parameters such as what level of control is given to the users and agency staff for viewing information related to business license transactions, licenses, and the entity.

The following security roles are delivered with predefined access configured based on the level of security you want to provide to your staff. Accordingly, confidential field values are masked for users who must be restricted from accessing the information:

- **Inquiry Duty:** With the highest level of security implemented, agency staff assigned to this role will have minimum access to information.
- **Limited Confidential Data:** With the medium level of security implemented, agency staff assigned to this role will have limited access to information.
- **Confidential Data:** With the least level of security implemented, agency staff assigned to this role will have complete access to information.

Security Role	Access Description	Associated Job Roles and Abstract Roles
<b>Inquiry Duty</b> ORA_PSC_AGENCY_BUSINESS_LICENSE_INQUIRY_DUTY	Basic information such as business owner name and title are displayed.	PSC Agency Staff
<b>Limited Confidential Data</b> ORA_PSC_BL_ACCESS_LIMITED_CONFIDENTIAL_DATA	Details in fields such as mailing address, email, phone numbers, and parcel information are displayed.  Additionally, details visible to the staff assigned with the Inquiry Duty role are also visible.	PSC Building Inspector PSC Chief Building Officer PSC Code Enforcement Supervisor PSC Inspections Supervisor PSC Zoning Administrator
<b>Confidential Data</b> ORA_PSC_BL_ACCESS_CONFIDENTIAL_DATA	No restrictions applied for users with this role assignment.  Users can view values in the fields such as federal, state, and city tax ID. In addition, details visible to the staff assigned with the roles Inquiry Duty and Limited Confidential Data are also visible.	PSC Auditor PSC Business Analyst PSC Business License Application Administrator PSC Business License Manager PSC Business License Specialist PSC System Administrator PSC Treasury Administrator PSC Treasury Supervisor

## Registered User View of Business License Transactions

Registered users can access a list of their own business license transactions. The public-facing list shows restricted information as compared to agent-facing list. Public users don't see the name of the assigned agent and confidential field values are masked.

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

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

Applicants can apply for a new business license by filling and submitting an application. They can also view the details of their submitted applications on their Applications list page. Contacts are added to an application by the applicant or by the agency staff. The primary contact and contacts who have full access to applications or have access to—view the application, pay fees, and print license—can view the details of applications. Contacts also see the applications they applied for themselves.

For information about adding and removing contact users, see *Setting Up Contact Types* and *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 business license 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 can pay for all or selected applications. Only those contacts who have full access to application or access to—view, pay, and print—can make payments. For more information, see *Working with Application Contacts* and *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*.

## Overview of General Page Controls

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

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

Page Element	Description
<b>Business Licenses, Permits, Planning Applications, and All</b>	Click these tabs to choose which types of transactions to list.
<b>Apply</b>	Click to access the Apply page, where you choose an application type and start a new application on behalf of an applicant.  For more information, see <i>Choosing an Application Type</i> and <i>Completing an Application</i> .
<b>Download</b>	Click to export the list to a .csv file.
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Last Updated ▼</div> <div style="border: 1px solid #ccc; padding: 5px;">Last 30 Days ▼</div>	<p>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.</p> <p>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.</p> <p><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.</p>
<b>Show All Statuses</b>	Use this switch to filter the list based on transaction status:




Page Element	Description
	<ul style="list-style-type: none"> <li>If the switch is off, the list includes only active transactions.  This is the default setting if any active transactions exist.</li> <li>If the switch is on, the list includes transactions in all statuses, including active, inactive, canceled and withdrawn applications.  This is the default setting if there aren't any active transactions.</li> </ul>
<b>Search</b>	Use keywords to search for transactions. For example, you can search using an application ID or applicant name. To search on a date, use the date format MM/DD/YYYY.
<b>Filter By</b>	<p>Apply filters to display transactions that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</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>
<b>Sort By</b>	<p>Here are some of the sorting options:</p> <ul style="list-style-type: none"> <li><i>Application:</i> The application ID.</li> <li><i>Type:</i> The application type.</li> <li><i>Status:</i> The activity status (not the license status).</li> <li><i>Creation Date:</i> The date when the application was first saved, regardless of when it was submitted.</li> <li><i>Created By:</i> The person who created the application.</li> <li><i>Submission Date:</i> The date when the application was submitted.</li> <li><i>Submitted By:</i> The person who submitted the application.</li> <li><i>Description:</i> The description of the application.</li> <li><i>Applicant:</i> The applicant for whom the application was created.</li> <li><i>Total Fees:</i> The fees for the activity.</li> <li><i>Total Due:</i> The unpaid fees for the activity.</li> <li><i>Expiration Date:</i> The date that a pending application expires (not the expiration date for the actual license).</li> <li><i>License Status:</i> Status of the business license.</li> <li><i>License Expiration Date:</i> The expiration date for the business license.</li> <li><i>Doing Business As</i></li> <li><i>Version Type:</i> The version of the business license.</li> <li><i>License Period:</i> The valid period for the business license.</li> </ul>
<b>List View</b>	View the transactions in list format.
<b>Grid View</b>	View the transactions in grid format. Unlike lists, grids include a header row with column labels.
<b>Map View</b>	View the transactions on an interactive map.



Page Element	Description
	<p>The left frame of the map view displays a list of transactions. The list includes only basic information about each item: the transaction ID, type, and status.</p> <p>The right frame of the map view displays a map with markers to show the locations of the items on the list. Click a list item to zoom to its marker on the map.</p> <p>See <a href="#">Viewing Map Markers</a>.</p>

## Identifying Transactions Page Icons

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

Icon	Description
 (Hold)	<p>Indicates that a condition has been placed on the application.</p> <p>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.</p>
 (Lock)	<p>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.</p>
 (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>

## Reviewing Business License Transactions

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

To review business license transactions:

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

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


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

2. Review transaction information.

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

Page Element	Description
License	Displays summary information about the license:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ Consultations display a consultation ID.</li> <li>○ License-related transactions (origination, renewal, and amendment) display the license ID. If the license has been issued, the ID is a link to the license details.</li> <li>○ All transaction rows display the application type.</li> <li>○ Origination transactions for origination, renewal, and amendment display <i>Active</i> if the license was issued. If the license was inactivated, the transaction displays <i>Inactive</i>.</li> <li>○ License-related related transactions (origination, renewal, and amendment) display license expiration information. If the license is about to expire, the expiration information includes a warning icon as well as the expiration date and the number of days remaining until that date.</li> </ul> <p>On the <b>All</b> tab, the column label for this information is <b>Application</b>.</p>
<b>Business Information</b>	<p>Displays the business name and address that are associated with the transaction location. This can be different from the name and address of the business itself.</p> <p>If the application indicates that the location is outside of the agency's jurisdiction, then the address of the business is displayed. Else, the specific location address is displayed.</p> <p>On the <b>All</b> tab, the column label for this information is <b>Property</b>.</p>
<b>Description</b>	<p>Displays the description of the application. Applicants optionally enter a description on the <b>Application</b> section of the application form. Agency staff can add or update descriptions on the overview or summary page of the transaction detail.</p>
<b>Activity</b>	<p>Displays the type of activity, such as <i>Consultation</i>, <i>Origination</i>, <i>Renewal</i>, or <i>Amendment</i>, along with the activity status.</p> <p>Pending transactions of all types also display expiration information. The transaction must be submitted by this date. When the pending transaction is about to expire, the messages include a warning icon and the number of days remaining.</p> <p><b>Note:</b> On the <b>All</b> tab, the column label for transaction activity information is <b>Additional Information</b>.</p>
<b>Assigned</b>	<p>This column appears only in grid view. It displays the name of the business license specialist who is assigned to the activity.</p> <p>In list view, the assignment information appears with the activity information.</p> <p>This information does not appear on the <b>All</b> tab.</p>
<b>Fees</b>	<p>Displays the total fees for the activity, and the balance due if the total has not been paid.</p>

Page Element	Description
<p><b>Actions</b></p> 	<ul style="list-style-type: none"> <li>○ Select the <b>Copy Application</b> button to copy this application into a new application. See <a href="#">Copying an Application</a>.</li> <li>○ Select the <b>Pay</b> button in the <b>Actions</b> column to submit payment information on behalf of the applicant.  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.  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.</li> <li>○ From the Action menu for the application row, select <b>Cancel Application</b> and enter a reason for the cancellation, and then click OK. The application will be removed from the active business license transaction list. However, when the <b>Show All Statuses</b> toggle button is on, all the applications will be listed.  <b>Note:</b> <b>Cancel Application</b> option is available only for the applications in <i>Payment Pending</i> status or <i>Pending</i> status. The cancelled applications can be viewed only by the agency staff and applicants.</li> <li>○ From the Actions menu for the application row, select <b>Withdraw Application</b> and enter a reason for the withdrawal, and then click OK. The application will be removed from the business license transaction.  <b>Note:</b> <b>Withdraw Application</b> option is available only for the applications in the <i>Submitted</i>, <i>Accepted In Process</i>, <i>Inspection</i>, and <i>License Issuance</i> status. You can also withdraw an application on the record details page using the <b>Actions</b> menu.</li> </ul> <p>For more information about paying fees, see the <a href="#">Payment Flow Overview</a>.</p>

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

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

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

## 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.

### Business license application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Cancel Business License	Allows an agency user to cancel a pending business license application.	PSC Business Analyst PSC Business License Specialist PSC Business License Manager PSC Business License 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](#).

## 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 **Business License Transactions** 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.

## 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.

You can withdraw business license applications with one of these statuses:

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

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

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 Business License	Allows an agency user to withdraw a business license application after submission.	PSC Business Analyst PSC Business License Specialist PSC Business License Manager

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Business License 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*.

## 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 **Business License Transactions** 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.

## Changing the Applicant on an Application

Agency staff working on permit, planning, or business license applications can replace the current applicant with another responsible party. The new applicant receives full application access.

The applicant designation is managed on the Contacts page in the application details, where the current applicant appears along with the previous applicant, if any, and other contacts. You can only change the applicant to another active registered contact.

Here's how to change the applicant:

1. In the left navigation panel of the application details, expand the application information section: **License Information, Permit Information, or Planning Application**.
2. Click the **Contacts** tab.
3. On the Contacts page, click the **Add New Contact** button if the new applicant isn't yet a contact on the application. The new applicant must be registered with the agency using a matching email address.
4. Click the **Actions** button for a contact in the list to select from the available actions.
5. Select *Make Applicant*.

You must enter the contact's address if the address is missing.

6. On the Confirm Applicant Update page, review and enter this information:

Page Element	Description
<b>New Applicant</b>	Displays the name of the contact who will be the new applicant.
<b>Previous Applicant</b>	Displays the name of the person who was formerly the applicant.
<b>Active</b>	Mark this check box to make the previous applicant an active contact for the application. If you leave this check box cleared, the previous applicant becomes an inactive contact without any application access.
<b>Contact Type</b>	Select a contact type.  This field appears when you mark the <b>Active</b> check box. You must select a contact type and application access level if the previous applicant is active.
<b>Access</b>	Update the default access level for the contact type, if desired. Select from these options: <ul style="list-style-type: none"> <li>○ <i>Full</i></li> <li>○ <i>View, pay, and print</i> (available only for business license contacts)</li> <li>○ <i>None</i></li> </ul> If the previous applicant is an inactive contact, the access level is <i>None</i> .

**7.** Click **OK**.

The list is updated to show the contacts as *Applicant* and *Previous Applicant*, respectively. Turn on the **Show inactive contacts** switch to show the previous applicant if they're not an active contact anymore.

*Related Topics*

- [Working with Application Contacts](#)

## Navigating to Business License Activity Details

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

You navigate to the activity details through a panel with tabs on the left side of the page. Only users with PSC\_BL\_ACCESS\_CONFIDENTIAL\_DATA permissions get full access to the license activity for a business license.

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

**Note:** For information about the activity details for contractor registration, see *Navigating to Contractor Registration Details*.

Page Name	Description
Activity Summary	View a summary of activity for the business license or consultation with links to more detail.  See <i>Viewing a Summary of Business License Activity</i> .
Business Information	View and update business information associated with a business license or consultation captured during the application process. <ul style="list-style-type: none"> <li>• Business Details</li> <li>• Owners</li> <li>• Location</li> </ul> See <i>Viewing Business Information</i> .  You can find business information associated with an issued license on the license pages. See <i>Managing Business Information</i> .
Workflow	View the workflow status of each task as defined by the agency using Oracle Integration Cloud (OIC).  See <i>Using Workflow</i> and <i>Managing Tasks</i> .
Application Details	Review information captured from the application intake form that is specific to the type of business license or consultation.  See <i>Viewing Business Application Information</i> .
Contractors	Review contractor information. This page is available if the intake form design included the Contractor field group.  See <i>Working with Contractors and Agents in Applications</i> .
Credentials	Review credential information collected from the application intake form that is specific to the type of business license.  See <i>Working with Credentials</i> .
Tax Related Details	Review tax-related details, such as the number of employees.  See <i>Working with Tax-Related Details</i> .
Contacts	Review and add contacts for the business license application.  See <i>Working with Application Contacts</i> .
Conditions	Review the conditions applied to the selected business license, with applied conditions followed by resolved conditions.  See <i>Applying Conditions to Business Licenses</i> .



Page Name	Description
Attachments	View files and upload or download documents. The <b>Business License</b> tab displays the attachments that you add to this business license transaction, the <b>Inspection</b> tab displays attachments added by inspectors in the Oracle Inspector mobile app, and the <b>All</b> tab displays attachments from all sources, including the Workflow page.  See <i>Working with Attachments</i> .
Comments	Review or add comments pertaining to this business license transaction.  See <i>Working with Comments</i> .
Inspections	Manage inspections for this business license application.  See <i>Managing Inspections for a Business License Application</i> .
Fees and Payments	Manage fees and payments.  See <i>Working with Fees and Payments</i> .
Communication	Send ad hoc email messages and notifications associated with this business license or consultation transaction.  See <i>Working with Communications</i> and <i>Working with Ad Hoc Communications</i> .
Status History	View the history of application status changes.  See <i>Viewing Application Status History</i> .
Related Transactions	Create and view links between transactions.  See <i>Working with Related Transactions</i> .

## Viewing a Summary of Business License Activity

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

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

### Header Information

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

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

The right side of the header displays:

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

The header also shows the physical location on a map.

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

## Viewing Application Details

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

Page Element	Description
<b>Status</b>	Review the application status.
<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 license application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page.</p> <p>For applicants submitting their application online, the received date field isn't available in the intake form or on the Activity Summary page.</p>
<b>Specialist</b>	<p>.</p> <p>Review the name of the specialist assigned to the consultation, registered contractor, or business license application.</p> <p>After a specialist is assigned, registered users view one of the following details:</p> <ul style="list-style-type: none"> <li>○ Specialist's name and their email ID</li> <li>○ No detail (the <i>Specialist</i> field is not displayed)</li> <li>○ Specialist's name only.</li> <li>○ Specialist's name and a general email ID of the agency</li> </ul>

Page Element	Description
	<p>Agency administrators configure the above display options on the <i>Agency Information – Business License Options</i> page. See <i>Setting Up Agency-Level Options for Business Licenses</i>.</p> <p>Only agency staff can view the specialist's name and assign or reassign a specialist to the application by clicking the <b>Assign</b> or <b>Reassign</b> link.</p> <p>Click the <b>History</b> icon next to the <b>Specialist</b> field to view a history of assignments.</p> <p>For more information about working with specialists, see <i>Working with Specialists</i></p>
<b>Description</b>	Enter a description of the application by clicking the <b>Add</b> link, or update the description by clicking the <b>Edit</b> link in the <b>Description</b> field. The agency staff or applicant can add or edit a description.
<b>Effective Date</b>	Review the date the business license becomes effective.
<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 business license type, you might see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see <i>Expiration Overview</i> and <i>Working with Application Expiration</i>.</p>

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

Page Element	Description
<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 <i>Working with Application Contacts</i>.</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 <i>Using Workflow</i>.</p>
<b>Fees and Payments</b>	View the total fees paid, amount due, and the date and amount of the last payment.

Page Element	Description
	Click the <b>View Details</b> link to open the Fees and Payments page. See <i>Working with Fees and Payments</i> .

## Working with Specialists

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

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

### Assigning a Specialist

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


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

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

### Viewing Specialist Assignment History

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

1. Select **Business License Transactions** on the Agency Springboard.
2. Click the row for a business consultation or license application on the Transactions page.
3. There are two ways to view the specialist assignment history on the Overview page:

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

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

## Viewing Business Information

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

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

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

Page	Description
<b>Business Details</b>	<p>View information such as the legal name of the business, the ownership type, address, federal tax ID, fiscal year end, and other business details.</p> <p>Agency staff with appropriate permissions can update the business information.</p>
<b>Owners or Corporate Officers</b>	<p>View the name and contact information of the business owner or corporate owners, as well as the ownership percentage.</p> <p>Agency staff with appropriate permissions can add or update the owner or corporate officer information.</p>
<b>Location</b>	<p>View information about the business location for the license. In addition to the application status, here's some of the license information included on the page:</p> <ul style="list-style-type: none"> <li>○ Doing Business As (DBA) name and website</li> <li>○ Physical address and parcel number</li> <li>○ Mailing and billing address</li> <li>○ Phone numbers and emergency contacts at the location</li> <li>○ Tax IDs and State Equalization Board number</li> <li>○ Business category, subcategory, and the start date of the business operations</li> </ul> <p><b>Note:</b> Agency staff with appropriate permissions can add or update the location information.</p> <p>For details, see <a href="#">Working with Business Location Information</a>.</p>

To add new business owners to a business license transaction, use the **Add** button on the Owners page. For details, see the section Adding Business Owners in the topic *Managing Business Information*.

## 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

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

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 Update Permit Workflow Attachments that were added by others and self	Update permit workflow attachments that were added by others and self	PSC System Administrator
PSC Update Permit Workflow Attachments that were added by self	Update permit workflow attachments that were added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Delete Permit Workflow Attachments that were added by others and self	Delete permit workflow attachments that were added by others and self	PSC System Administrator
PSC Delete Permit Workflow Attachments that were added by self	Delete permit workflow attachments that were added by self	PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician



Primary Role	Access Description	Associated Job Roles and Abstract Roles
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
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.

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

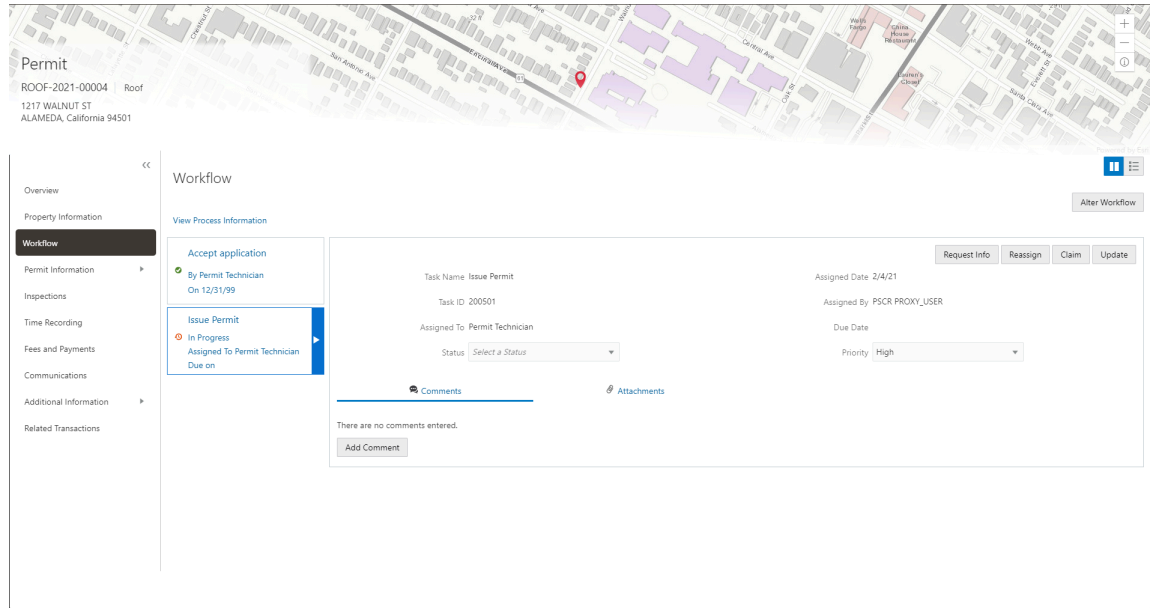
To manage workflow tasks in a two-panel view:

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

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

4. Click the **Show Two-Panel View** button to display the two-panel view.

This example illustrates the Permits Workflow page in a two-panel view.



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

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

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

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

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

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

Page Element	Description
<b>Reassign</b>	<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 <i>Using the Code Officer Worklist</i> and <i>Using the Code Technician Worklist</i>.</p> <p>For details related to permits, planning and zoning, and business license application tasks, see <i>Managing Tasks</i>.</p>

Page Element	Description
<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> <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>	<p>Set the priority to <i>High</i>, <i>Medium</i>, or <i>Low</i>. The priority is informational only.</p>

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

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

- Sends an update to the workflow engine in OIC, triggering any subsequent tasks in the workflow.

For example, in a delivered sample workflow, approving a permit application triggers an update to the permit status, which triggers an email to the applicant. The workflow then reaches a decision point that checks whether a plan review is required. The next human step in the process is either completing a plan review or, if no review is required, issuing the permit.

- Refreshes the Workflow page, which becomes read-only if the task is complete. Processing time can vary.

## 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:

- The **Task Name** and **Status**.
- The **Last Updated Date**.
- The **Days Taken**, which represents the number of days elapsed while the task is in progress.  
The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.
- **Comments**, which displays the two most recent comments.  
For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.

6. To review task history, click a specific task to open the Task Details page.  
This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.
7. Close the Task Details page to return to the workflow list view.



## Altering Workflow

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

To alter workflow:

1. Select the **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:

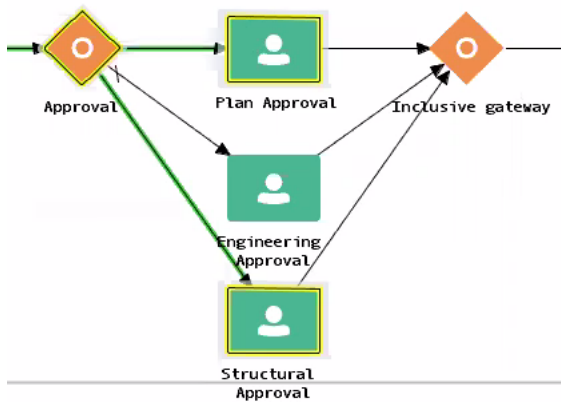
- Do not depend on each other to be completed.
- Can be completed simultaneously.

The Alter Workflow action opens a modal to list only the tasks that are outside the inclusive or parallel gateway specifically when the gateway is used in the process. Tasks within a parallel or inclusive gateway are not listed.

If you want to view the tasks within the parallel gateway, you must navigate to the parallel or inclusive gateway start node. When inside the gateway, the Alter Workflow action opens the modal to list only the tasks that are within the gateway. Tasks outside of the gateway are not displayed.

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

▲ Structural Approval

New Workflow Activity Name

---

Update Transaction Status

Comments

## Working with Workflow for Reopened Transactions

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

- Completed
- Expired

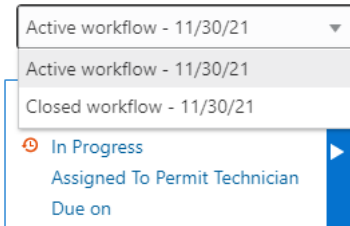
For more information on reopening transactions, see *Reopening a Permit or Planning Application*.

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

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

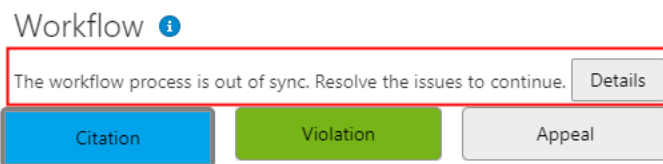
When working with the reopened transaction, the Workflow tab reflects the currently active workflow instance and all previously closed workflow instances for reference. Use the instance drop-down list to select an instance.

## Workflow



## Working with Inconsistent Processes

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



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

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

## Working with Consultation Outcome

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

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

## Adding a Required Application

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

1. Select **Business License Transactions** on the Agency Springboard.
2. Select the consultation application record for which you want to add the required applications. The consultation details page opens.
3. Click **Consultation Outcome** in the left panel. The Consultation Outcome page lists all the required application types added for the submitted business license application.

- 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.

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

## Adding a Comment

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


- Select **Business License Transactions** on the Agency Springboard.
- Select the consultation application record for which you want to add your comment. The consultation details page opens.
- Click **Consultation Outcome** in the left panel to access the Consultation Outcome page.
- In the Additional Comments section, click the **Add Comment** button to open the Add Comment page and enter text. You can use the **Rich Text Editor** option for formatting your comment.
- Click **Save**.

## Viewing the Consultation Outcome

To view the summary information:

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

Page Element	Description
<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 consultation application. You can make changes and save or submit the application.</li> <li>○ <i>Link</i>: Click to open the Link Application modal page. Use the look-up prompt to select an existing application and click <b>Save</b>. The Consultation 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 business license application.</li> </ul>

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

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

## Viewing Business Application Information

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

When an agency designs the intake form for a specific type of business license application, they use elements that capture the information necessary for evaluating adherence to business license requirements. For example, for a restaurant application, the application details might include data about fire safety, seating capacity, site use, and parking. The application details might also include requirements for application submittal.

## Updating Application Details

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

- Select **Business License Transactions** on the Agency Springboard.
- Click the row for a consultation or business license application on the Transactions page.
- On the Overview page, expand the **Consultation Information** or **License Information** navigation menu item in the left pane.
- Click the **Application Details** link.
- On the application details page, click the **Edit** button for the section you want to edit.

For example, if the agency has enabled, applicants have the option of submitting their license application or amendment application with a proposed effective date that is in the future.

The assigned specialist can decide the date that the business can start, using these fields:

Page Element	Description
<b>Proposed Effective Date</b>	View the proposed date of starting the business or the effective date of the amendment as entered by the applicant.
<b>Approved Effective Date</b>	<p>Enter the date from which the business license will be active, or the amendment becomes effective. This date will override the date proposed by the applicant.</p> <p><b>Note:</b> If you leave the field blank, the approved effective date will be updated as the proposed effective date entered by the applicant.</p>

See the details in the section *Applying for Future Dated Business Commencement* in the topic *Completing an Application*.

Additionally, applicants and agency staff have the option of submitting their amendment application with an option to reactivate an inactive license.

The assigned specialist reviews the application and decides the date that the business license can change to active status:

Page Element	Description
<b>Reactivate License</b>	Review the option enabled by the applicant. You can turn off the check box if you want to complete the amendment without reactivating.
<b>Proposed Effective Date</b>	<p>Displays the proposed date from which the business license will be active—entered by the applicant.</p> <p>If the applicant leaves this field blank, the date on which the amendment application is approved will be the effective date of license reactivation.</p>
<b>Approved Effective Date</b>	<p>Enter the date from which the business license status will change to <i>Active</i>.</p> <p>This field is available only to agency staff. If you leave the field blank, the proposed effective date will be applied as the approved effective date.</p> <p>Expiration date calculations are determined based on the approved effective date.</p>

See the section *Reactivating Licenses* under *Inactivating Business Licenses*.

6. Update available fields on the page.
7. Click the **Done** button to save.

## Working with Meetings

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

Administrators configure the system to enable the applicants and the agency staff to schedule meetings – using the Meeting Setup Template page. See *Setting Up Meetings*.

### Security Details for Working with Meetings

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Planner Calendar	Access the planner calendar.	PSC Agency Staff – All agency users
PSC Planning Application Meeting Inquiry	View a planning application meeting.	PSC Agency Staff – All agency users
PSC Planning Application Meeting Management	Schedule and reschedule planning application meetings.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Pre-Application Meeting Inquiry	View a 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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.

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
Meeting Subject	Review the subject for the meeting.  <b>Note:</b> Only specialists or planners can change the subject of the meeting.
Meeting Agenda	Review the agenda for the meeting.



Page Element	Description
	<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 <a href="#">Setting Up Planning Application Types</a> for the preapplication meeting template and <a href="#">Setting Up Business License Types</a> for the consultation meeting template.</p> <p>For more details about templates, see <a href="#">Setting Up Meetings</a>.</p>
<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>

- 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 use the Business Consultation 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** 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.



Page Element	Description
<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.

1. Select the **Specialist Calendar** tile on the Agency Springboard.
2. On the Calendar page 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 transaction for which you want to reschedule the meeting.
3. Click the **Meetings** link to view the meetings page for the application.
4. On the record of the meeting you want to reschedule, click the **Reschedule** button.
5. 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.

6. 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 transaction for which you want to reschedule the meeting.
3. Click the **Meetings** link to view the meetings page for the application.
4. On the record of the meeting you want to cancel, click the **Cancel** button.
5. Click **OK** to confirm. The meeting page now lists the meeting record with a status of Canceled.

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

## Working with Tax-Related Details

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

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

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

Here are the fields with business tax information from the submitted application.

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

## 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 Licenses*.

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 Credentials

Agencies can collect credential information associated with a business license from the origination, amendment, or renewal application intake form. The credential, which is an official document such as a food service certificate for a restaurant or a bond, license, or permit, becomes part of the details stored with the business license.

Agency staff, applicants, business owners, and contacts with application access can view credential information on the Credentials page in the application and license details. Only agency staff with permissions can manage the credential information.

1. Click the **Business License Transactions** or **Business Licenses** tile on the agency springboard or the **Applications** tile on the landing page for registered public users.
2. Select an application in the list.
3. In the left navigation pane, click **License Information > Credentials**.
4. View the credentials and attributes that were entered in the application form. Only agency staff with permissions can update the credential information.

The credential attributes and labels are set up by the agency. The credential information that your agency can collect includes these attributes:

- Qualifier name (the name of the qualifying individual on the credential)
- Business name
- Description
- Certificate or license number
- Amount
- Currency
- Start date
- Expiration date
- Exemption status and reason

Applicants may also provide credential documentation as attachments.



If the exemption attributes for a credential are configured, applicants who indicate that they are exempt from a credential on the business license application form don't need to provide any other information for the credential that the agency requires.

*Related Topics*

- [Setting Up Credentials](#)

## 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. On the same page, agency staff can also make another active registered contact the applicant and assign a different level of access to the previous applicant.

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	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
	the application is open and currently being processed.	
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
Show inactive contacts	Turn on this switch to display inactive contacts in the grid. When the switch is off, only active contacts are listed.

Page Element	Description
<b>Name</b>	The name of the contact.  Labels that identify the contact appear under the name: <i>Applicant</i> , <i>Previous Applicant</i> , and <i>Owner</i> (the business owner in business license information).
<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>	The contractor license number and the license type associated with the license.  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.
<b>Access</b>	Indicates the type of access the contact has to the application: <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>	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.  <b>Note:</b> The primary contact has the same application access as the applicant regardless of the access defined for their contact type.
<b>Active</b>	Indicates whether this is an active contact.

Page Element	Description
	<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> <p>Select <i>Make Applicant</i> to select this contact as the responsible party for this application and assign a different level of application access to the previous applicant. For more information, see <a href="#">Changing the Applicant on an Application</a>.</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> <p>The available contact types are listed with description and the access they have, which are set up by your administrator.</p>
<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>	<p>Turn on this switch to make the selected contact person the primary contact for this application. Applications can have only one primary contact. Designating a new primary contact removes the primary designation from any other contact who was previously designated as primary.</p>
<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 <a href="#">Setting Up Contact Types</a>.</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.
  - o If the contact is the applicant, you can't modify the name. This person will always be identified as the applicant and active on the application. You can, however, change the contact type.
  - o All fields are available for updates for contacts other than the applicant.
3. 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 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



Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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 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.

Page Element	Description
<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 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 <i>Setting Up Conditions</i>.</p>
<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>	Displays the message associated with the selected condition. This message is entered by your agency administrator in the condition definition and can't be updated here.
<b>Severity</b>   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</p>

Page Element	Description
	condition rule, and for a condition with Lock severity, all condition rules are automatically applied.  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 as entered by your agency administrator in the condition definition, but you can update the text here.
<b>Additional Information</b>	Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.

When you're viewing the condition details after the condition was applied, you'll see the name of the user who applied the condition and the date. 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	Add and update attachments to submitted permits until they are closed.  View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Agency Permits Inquiry	View permit attachments.	PSC Agency Staff – All agency users
PSC Permits Attachments User	Add attachments to permits.  Update and delete attachments added by themselves.	PSC Inspections Supervisor  PSC Geographical Information System Administrator  PSC Finance Administrator  PSC Economic Development Officer  PSC Chief Building Officer  PSC Cashier  PSC Building Inspector  PSC Apply Permit Duty  PSC System Administrator  PSC Principal Planner  PSC Planning Coordinator  PSC Plan Reviewer  PSC Permits Supervisor  PSC Permit Technician
PSC Add Permit Attachments	Add permit attachments.	PSC Inspections Supervisor  PSC Geographical Information System Administrator

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

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

These security roles apply to planning application attachments:

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



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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Cashier PSC Principal Planner PSC Plan Reviewer
PSC Delete Planning and Zoning Attachments Added by Self	Delete planning and zoning attachments added by themselves.	PSC Planning Attachments User Duty PSC Apply Planning and Zoning Duty PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator 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> <ul style="list-style-type: none"> <li> - Edit Protected Document</li> <li> - Archive Protected Document</li> <li> - Archive Protected or Protected Editable Document</li> </ul>	<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> <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> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <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>
<b>Uploaded By</b>	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.
<b>Source</b> on the Inspection tab for permits	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.
<b>Reference</b>	View attachment information:
<b>Category and Subcategory</b>	View the document category for the attachment.
<b>Final</b>	Displays <i>Yes</i> when agency staff turn on the <b>Final Document</b> switch on the Attachment Details page for permit attachments.

Page Element	Description
	<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>

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 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

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

### 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Add Comments to Planning and Zoning	Add comments to planning applications that are not closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Planning Application Management with Elevated Access	Add comments to planning applications at all times.	PSC Zoning Administrator PSC System Administrator
PSC Update Planning and Zoning Comments added by others and self	Update planning and zoning comments added by others and by themselves.	PSC System Administrator
PSC Update Planning and Zoning Comments added by self	Update planning and zoning comments added by themselves.	PSC Apply Planning and Zoning Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector

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

## 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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:
  - o *Favorite*: Comments that you have marked as favorite.
  - o *Standard*: All the predefined comments available.
  - o *Recent*: Comments that were recently posted.
2. Select a comment and click the **Insert** button to post the comment.

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

See *Managing Comments*.

## Working with Fees and Payments

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

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

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

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

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

## Viewing Fees and Payments for an Application

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

3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the application.
4. On the Fees and Payments page, view a list of fees, including this information:

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

Page Element	Description
<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>	The amount of fees that are designated as payable.  The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.
<b>Total Paid</b>	The amount of the total fees already collected.
<b>Balance Due</b>	The remaining portion of the fees yet to be collected.
<b>Pay</b>	Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment.  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.  <b>Note:</b> The <b>Pay</b> button takes applicants and contacts with application access directly to the Checkout page in payment services.
<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.

Agencies can configure a Business Rules Framework event to automatically advance the current workflow activity to the next activity—after the payment is completed.

Agencies configure update workflow actions in the Business Rules Framework. You use the *Payments Received by Transactions* common event to configure the business rule. For details, see [Setting Up Update Workflow Actions](#).

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.

## 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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 PSC Finance Administrator PSC Economic Development Officer PSC Cashier

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

Page Elements	Definition
	<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> <p>Enter the email addresses, user IDs, or phone numbers of the people or organizations that you want to send the communication to.</p>

Page Elements	Definition
	<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>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>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>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> <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>



Page Elements	Definition

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

4. Click **Send**.

## Communicating Using a Web Form

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

Here's how to create a web form:

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

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

5. Click **OK** to save your web form questionnaire and return to the Ad Hoc Message page. The **Create Web Form** button displays the number of questions included on the web form in parentheses.
6. Click **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 <a href="#">Using Attributes in Communication Templates</a>.</p>
<b>Remarks</b>	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

## Modifying Ad Hoc Alerts

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

## Deleting Ad Hoc Alerts

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

## Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
<b>Channel Type</b>	<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>
<b>Display Format</b>	<p>Select the display format of the message. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>HTML</i>: Displays rich text, links, and images</li> <li>○ <i>Text</i>: Displays plain, unformatted text.</li> </ul>

Page Elements	Definition
	<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>
<p><b>Cc and Bcc</b></p>	<p>Enter the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p>

Page Elements	Definition
	<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.

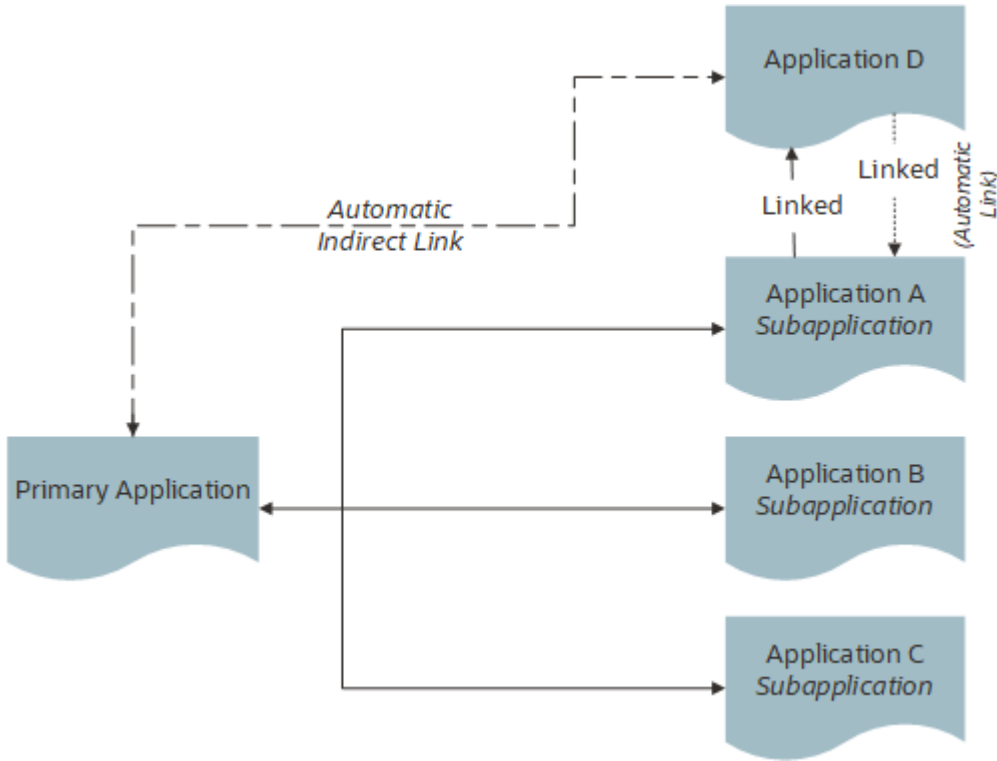
**Note:** A primary application can be linked to multiple subapplications but a subapplication can be linked to only *one* primary application. Both type of applications can be linked to other applications using the link type—Linked. Also, once a permit is marked as a subapplication, the system disables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

## Overview of Contractor Registration

Contractor registration in the Business Licenses offering provides the process for contractors to register their contractor licenses with the agency.

Before you begin, your agency configures a business license transaction type with the *Contractor Registration* subclassification. The **Contractor** field group in the business license application designer allows the agency to collect contractor license information such as classification, insurance, bond, and more in the registration intake form. Agencies can optionally add instructional text to provide guidance and instructions in each contractor license section.

Your agency can also set up communications, fees, expiration, and the renewal and amendment process for contractor registration transactions, as for business license transactions. When contractors renew or amend their registration, the original contractor license information is copied over to the renewal or amendment.

Let's take a look at the steps for contractor registration:

1. The contractor fills out and submits the agency's registration intake form.

When the business license application has a *Contractor Registration* subclassification, at least 1 contractor license is required. Depending on the application, the registration form may allow more than 1 contractor license on the application or require the contractor to select a contractor license from the agency-maintained list of approved contractor licenses.

For more information, see *Entering Contractor Information*. For general information about completing an application, see *Completing an Application*.

2. After the registration is submitted, the agency staff manually reviews the application, completes the workflow, and approves the contractor license registration.

For more information, see *Using Workflow* and *Navigating to Contractor Registration Details*.

3. When the registration is complete, the contractor's license registration information and contacts for the contractor license are added to the agency's contractor license list and the contractor's business license.

For more information, see *Working with Contractor Licenses* and *Managing Business Licenses*.

4. The contractor registration with the agency can be maintained along with business licenses, utilizing the expiration, renewal, and amendment processes.

For more information, see *Renewing and Amending Contractor Registration*.

For more information about contractor management, see the chapter, "Managing Contractor Information," in the *Using Business Licenses* and *Using Community Development Permits* guides.

For security information, see *Security Details for Managing Contractor Information*.

### Related Topics

- [Setting Up Contractor Registration](#)

## Navigating to Contractor Registration Details

The contractor registration activity detail pages contain the information you need to process contractor registration requests with your agency. The pages include registration information collected from the registration intake form, workflow, fees and payments, communication, conditions, and more.

When contractors register, they submit an application form providing their business information, like company name, address, contact details, and any relevant information such as qualification, education, proof of insurance, and bonding information. You can review and update information that was collected from the registration intake form on the activity detail pages, which you can navigate to through a panel with tabs on the left side of the page.

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

Page Name	Description
Activity Summary	View a summary of registration activity with links to more detail. The activity can be the origination, an amendment, or renewal, depending on the contractor registration type.  See <a href="#">Viewing a Summary of Contractor Registration Activity</a> .
Business Information	View and update business information associated with a contractor collected during the registration intake process.  <ul style="list-style-type: none"> <li>• Business Name</li> <li>• Owners</li> <li>• Location</li> </ul> This information becomes part of the agency's contractor license record when registration is complete.  See <a href="#">Viewing Business Information</a> .  You can find business information associated with an issued license on the license pages. See <a href="#">Managing Business Information</a> .
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> .
Registration Details	Review additional registration details. Your agency determines which information to collect when they design the registration intake form.
Tax Related Details	Review tax-related details, such as the number of employees.  See <a href="#">Working with Tax-Related Details</a> .
Contractor	Review the contractor license information entered on the registration intake form that's specific to the type of contractor registration, such as contractor type, license classifications, contractor bond, contractor contacts, and more. This information becomes part of the agency's contractor license record when registration is complete.

Page Name	Description
	See <i>Working with Contractor Registration</i> .
Credentials	Review the credentials provided by the contractor in the registration intake form. This page is only available if the <b>Credentials</b> page element is included when your agency designs the registration intake form.  See <i>Working with Credentials</i> .
Contacts	Review and add contacts for the contractor registration.  See <i>Working with Application Contacts</i> .
Conditions	Review the conditions applied to the selected business license application, which in this case is contractor registration. In the grid, applied conditions are listed first, followed by resolved conditions.  See <i>Applying Conditions to Business Licenses</i> .
Attachments	View files and upload or download documents. The <b>Business License</b> tab displays the attachments that you add to this transaction.  See <i>Working with Attachments</i> .
Comments	Review or add comments pertaining to this transaction.  See <i>Working with Comments</i> .
Fees and Payments	Manage fees and payments.  See <i>Working with Fees and Payments</i> .
Communication	Send ad hoc email messages and notifications associated with this business license or consultation transaction.  See <i>Working with Communications</i> and <i>Working with Ad Hoc Communications</i> .
Status History	View the history of application status changes.  See <i>Viewing Application Status History</i> .
Related Transactions	Create and view links between transactions.  See <i>Working with Related Transactions</i> .

## Viewing a Summary of Contractor Registration Activity

You view a summary of activity for a contractor's registration when you access the activity detail pages. Here you get a snapshot of the registration activity details, with links to more information about the contacts, workflow, and fees and payments.

The summary shows the current status of the contractor registration. When the registration is complete, the contractor's license information is added to the agency's contractor license and business license lists, where the registration expiration and related activities can be managed.

### Contractor Registration Header Information

The left side of the header displays the contractor's business address.

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

The right side of the header displays:

- Registration Activity.
- The contractor registration number.
- The type of the activity, such as Origination, Renewal, or Amendment.

### Viewing the Activity Summary

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

Page Element	Description
<b>Status</b>	Review the registration status.
<b>Submitted By</b>	Review the name of the person who submitted the registration and the date when it was submitted.
<b>Received Date</b>	Review the date when the license application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Activity Summary page.  For contractors submitting their registration online, the received date field isn't available in the intake form or on the Activity Summary page.



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

4. There are also sections with information about the contractor registration activity with links to navigate to more detail.

Page Element	Description
<b>Contacts</b>	<p>View the contractor contact'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 <i>Working with Application Contacts</i>.</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 <i>Using Workflow</i>.</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 <i>Working with Fees and Payments</i>.</p>


Page Element	Description

## Working with Contractor Registration

You can review and update contractor license information that was collected from the contractor registration intake form on the Contractor page in the contractor registration activity details.

Here's the contractor information displayed on the grid.

1. Select the **Business License Transactions** tile on the agency springboard.
2. Click the row for the contractor registration transaction.
3. Click **Contractor** in the left navigation menu.
4. On the Contractor page, review the following summary information:

Page Element	Description
<b>Contractor</b>	Displays the name of the contractor business and owner name.
<b>License</b>	Displays the contractor license number once the registration is complete and the contractor is approved in the agency's system. The status <i>New</i> appears when the license number hasn't been assigned yet.
<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>Address</b>	Displays the address of the contractor business.
<b>Phone</b>	Displays the phone number of the contractor business.
<b>Email</b>	Displays the email address of the contractor business.
	Click the <b>Actions</b> button to delete or refresh the contractor row.

5. Select the row of the contractor license to view the license details, such as qualification, education, proof of insurance, and bonding information, on the Contractor Registration page. The contractor license information collected on the registration intake form depends on agency setup for the business license type with contractor registration subclassification.

6. Depending on your access, you can update the license information or delete the contractor license.

#### Related Topics

- [Working with Contractors and Agents in Applications](#)

## Renewing and Amending Contractor Registration

You can renew and amend contractor license information that was collected from the contractor registration intake form on the Business Licenses page in the contractor registration activity details.

To renew a contractor registration:

1. Select the **Business Licenses** tile on the agency springboard.
2. Find the business license associated with a contractor that you want to renew. You can renew the application when the status is completed and active, and the date is within the window approaching the expiration date.
3. Click the **Action** icon in the row of the application you want to renew.
4. Select the **Renew** action.
5. On the Contractor Registration page, click the row of the application and then click the **Next** button.
6. Click the **Edit** button and make the required edits to the application, and then click the **Done** button.
7. Click the **Submit** button. The system will update the contractor license and contractor contact information back to the contractor license file.

To amend a contractor registration:

1. Select the **Business Licenses** tile on the agency springboard.
2. Find the business license associated with a contractor that you want to amend. You can amend the application when it is in active status.
3. Click the **Action** icon in the row of the application you want to amend.
4. Select the **Amend** action.
5. On the Contractor Registration page, click the row of the application.
6. On the Contractor modal page, you can edit the contractor details and click the **Done** button.
7. On the Contractor Registration page, click the **Next** button.
8. After making the required edits, click the **Done** button. The system will update the contractor license and contractor contact information back to the contractor license file.
9. Click the **Submit** button.



# 7 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.

Agencies may make a contractor license required for specific permit, planning, and business license application types by turning on the switch to **Require at least 1 contractor license** in the application designer under the contractor properties of the **Contractor** field group. When the agency activates the requirement, the applicant must provide a contractor license to submit the application. For more information about setting up this validation, see [Using Predefined Field Groups](#) and [Using the Intake Form Designer for Business Licenses](#). Applicants can't delete the license they added as part of the requirements for the application; only administrators can delete the license after the application is submitted.

Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are always required to select a contractor license.

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](#).

*Related Topics*

- [Entering Contractor Information](#)
- [Entering Contractor Information on Permit and Planning Applications](#)

## 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.

Page Element	Description
<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.
<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.

Action	Description
Delete	Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the <b>Used in Application</b> field.

5. Select the row of the contractor license to access the detail pages, where you can update the contractor information, including contractor approval.

## Adding Contractor Licenses

Agency staff with appropriate permissions can manually enter individual contractor license information in the main contractor records shown in the list on the Contractors page.

Your agency may initially use an automated batch method to load multiple 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
License Source	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
License Type	Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.

Page Element	Description
	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>	<p>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>.</p> <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.

Page Element	Description
<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> <p>If you don't know the postal code, click the <b>Don't know</b> link to display a full set of address fields.</p>
<b>Address Line 1 and 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>	<p>License classifications indicate the type of work that the contractor is licensed to perform.</p> <p>This grid lists a <b>Code</b> and a <b>Description</b> for each classification.</p> <p>If integration is not active and the fields are editable, selecting a code displays the associated description.</p>



Section Name	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> .
<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 transactions, contacts, attachments, comments, and conditions.

### 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.

Here's how 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:

- Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
- Update the **License Status**.
- If integration is active, click the **Validate** button to retrieve the most recent contractor information and refresh the license detail fields.

System administrators can update data manually even when integration is active.

- If integration is not active, manually modify the contractor information as needed.

6. Click **Save**.

## Viewing Transactions

When the contractor license is used on transactions, you can view consolidated lists here.

1. Click the **Transactions** tab in the left panel navigation.
2. Click the tabs to view the different transaction types:
  - **Permits** - Displays permits where the contractor license is used.
  - **Planning Applications** - Displays planning applications where the contractor license is used.
  - **Business Licenses** - Displays current business licenses associated with the contractor license, when the agency offers Business Licenses.
  - **Business License Transactions** - Displays business license transactions where the contractor license is used, when the agency offers Business Licenses.
3. Click the transaction row to open the transaction in a new browser tab.

## Working with Contacts

Click the Contacts tab in the left panel to open the Contacts page. For information about working with contractor contacts, see [Adding Contractor License Contacts](#).

## 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*.

## Working with Conditions

Click the Conditions tab in the left panel to open the Conditions page. For information about working with conditions, see *Applying Conditions to Contractor Licenses*.

## 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
	<p>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.</p> <p>For more information about conditions placed on permits or planning applications, see <a href="#">Applying Conditions to Applications</a>.</p>
 Show All Statuses	<p>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.</p>
	<p>Indicates applications where the contractor is no longer being used.</p>
Application information	<p>Review summary information about an application:</p> <ul style="list-style-type: none"> <li>○ ID</li> <li>○ Application</li> <li>○ Status</li> <li>○ Property</li> <li>○ City</li> <li>○ Description</li> <li>○ Applicant</li> </ul>

Page Element	Description
	o Total Fees

**Note:** For information about grid formats and common grid controls, see *Using Grids* and *Personalizing Grid Displays*.

- Click the transaction row to open the application's Overview page in the permit or planning application details. If the transaction is in a *Pending* status, the application form opens when you click the row.

## Managing Authorized Agents

Authorized agents are added when an applicant self-identifies as an agent for a licensed contractor on an intake form. Agency staff can also manually add and update authorized agents on the Contacts page in the contractor record details, and indicate whether the authorized agent is a contractor operating under the contractor license.

The agent's name and contact information are copied from the applicant information on the intake form and added to the contact list in the **Contacts** tab of the contractor license details. You can verify the agent and update their verification status depending on the results. Agents who are pending verification or whose verification failed have an inactive status.

When you manually add an authorized agent or contractor to the contractor details, the new contact is automatically active. For information about manually adding authorized agents or contractors operating under a license, see "Adding Contacts" in *Managing Contractor License Details*.

To manage authorized agents for a license:

- Select **Contractor > Contractors**.
- Locate and select the contractor license.
- Click the **Contacts** tab in the left navigation pane to access the Contacts page with authorized agents and contractors associated with the license.
- Review the following information:

Page Element	Description
<b>Name</b>	Displays the authorized agent or contractor's name, email, and phone.
<b>Email</b>	Displays the email address of the license contact.
<b>Phone</b>	Displays the phone number of the license contact.
<b>Business</b>	Displays the business name of the license contact.
<b>License Holder</b>	Indicates whether this authorized agent is the license holder of the contractor license.
<b>Type</b>	Displays the relationship this person has to the contractor license:

Page Element	Description
	<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.

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.
<b>Severity</b>	Displays the level of severity defined for the selected condition.  <ul style="list-style-type: none"> <li>○ <b>Lock:</b> This severity suspends all operations and selects all rules for the condition.</li> </ul>



Page Element	Description
 Lock  Hold   Notice	<ul style="list-style-type: none"> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<b>Apply Condition to Transactions</b>	<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>
<b>Include in-process transactions</b>	<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>
<b>Condition Rules</b>	<p>Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied.</p> <p>Available rules include the following:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b> (applicable only when a license is used on an intake form)</li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b> (applicable only to permits)</li> <li>○ <b>Prevent Inspection Result</b> (applicable only to permits)</li> <li>○ <b>Prevent Final Inspection</b> (applicable only to permits)</li> </ul> <p>You also can't add the license to the Contractor page in the application details when the <b>Prevent Application Progress</b> rule is applied.</p> <p>For condition rule descriptions, see <a href="#">Setting Up Conditions</a>.</p>

Page Element	Description
<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.

# 8 Working with Business License Inspections

## Security Details for Working with Business License Inspections

This topic describes important security roles, requirements, or considerations specific to working with business license inspections.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Schedule and cancel inspections for business license transactions on which the user is the applicant or a contact with access.  View inspection attachments on business license applications on which the current user is the applicant.	PSC Registered Public User
PSC Business License Inspections Supervisor	Manages the workflow and people to get through inspection jobs everyday. Keeps track of inspectors, districts, and workload.	PSC System Administrator
PSC Business License Management with Elevated Access	Add comments to inspections after they are closed.  Add attachments to inspections after they are closed.	PSC Business License Administrator PSC Business License Manager PSC System Administrator
<i>Request and Schedule</i>		
PSC Inspection Request Management	Manage inspection requests.	PSC Business License Administrator PSC Business License Inspections Supervisor PSC Business License Inspector PSC System Administrator
PSC Schedule Inspection	Schedule inspection.	PSC Business Analyst PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC System Administrator
PSC Cancel Inspection Request	Cancel inspection request.	PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspections Supervisor PSC Business License Inspector PSC System Administrator
<i>Inspection Checklist Setup</i>		
PSC Add Inspection Checklist	Add inspection checklist.	
PSC Add Inspection Checklist Items	Add inspection checklist items.	
<i>Attachments</i>		
PSC Inspections Attachments User	Manage inspection attachments.	PSC Business Analyst PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC View Inspection Attachments	View inspection attachments.	PSC Business License Administrator PSC Business Analyst PSC Business License Manager PSC Business License Specialist PSC Business License Inspections Supervisor PSC Business License Inspector PSC System Administrator
PSC Add Inspection Attachments	Add inspection attachments.	PSC Business License Administrator PSC Business License Manager PSC Business License Specialist

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC Update Inspection Attachments added by self	Update inspection attachments added by themselves.	PSC Business Analyst PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC Delete Inspection Attachments added by others and self	Delete inspection comments added by others and themselves.	PSC Business License Administrator PSC System Administrator
PSC Delete Inspection Attachments added by self	Delete inspection comments added by themselves.	PSC Business Analyst PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
<i>Comments</i>		
PSC Add Comments to Inspections	Add comments to inspections.	PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC Update Inspection Comments added by self	Update inspection comments added by themselves.	PSC Business Analyst PSC Business License Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC Update Inspection Comments added by others and self	Update inspection comments added by others and themselves.	PSC Business License Administrator PSC System Administrator
PSC Delete Inspection Comments added by self	Delete inspection comments added by themselves.	PSC Business Analyst PSC Business License Administrator PSC Business License Manager PSC Business License Specialist PSC Business License Inspector PSC Business License Inspections Supervisor PSC System Administrator
PSC Delete Inspection Comments added by others and self	Delete inspection comments added by others and themselves.	PSC Business License Administrator PSC System Administrator

## Overview of Working with Inspections

This overview provides information about working with inspections, including application statuses when you can create and manage inspections and issues that prevent inspections from being created or scheduled, such as conditions and inspection dependencies.

Agency staff can create and manage inspections, including pending inspections, as long as the application isn't in a presubmittal or terminal status. Here are the application statuses in which agency staff can create or update inspections:

- Business license application statuses: *Submitted, Application Accepted, In Process, Inspection, or License Issued.*
- Permit application statuses: *Submitted, Application Accepted, In Process, Plan Review, Inspection, About to Expire, or Permit Issued.*

Applicants can only create inspections or schedule pending inspections when business license applications are in an *Inspection* status or permit applications are in an *Inspection, About to Expire, or Permit Issued* status. Applicants can't create pending inspections, but if the agency allows them to postpone their inspections, the inspections are moved into a pending status.

## Inspection Request Considerations

There are several reasons that you may not be allowed to request or schedule an inspection. When you're making a request for multiple inspections, only those that meet the requirements are created. The system displays the reasons the inspections can't be created. Let's take a look at the issues that may prevent you from creating an inspection.

### *Issues that prevent an inspection from being created or scheduled*

Inspection Issue	Description
Incomplete dependencies	<p>Agencies may only allow inspections to be performed after prerequisite inspections are completed with a passing or corrected result, but agency staff can override dependency requirements when assigning, reassigning, or scheduling inspections. Applicants can't schedule an inspection or update a pending inspection that has prerequisite inspections.</p> <p>If you have selected multiple inspections, you can schedule only the inspections with no dependency requirements or prerequisites that are already complete with a Pass or Corrected result.</p> <p>Agencies identify inspection dependences in the inspection setup on the global Inspection Dependencies page and Inspection Group page.</p> <p>Agency staff with permissions can modify inspection dependencies on the Update Dependencies page accessed from the Inspections list page in the permit or business license details.</p>
Missing district	<p>Assigning districts to properties is required setup for inspection requests and scheduling. Agency staff can create pending inspections with an incorrect or missing district if the agency supports pending inspections.</p> <p>Inspections are scheduled and assigned based on the district associated with a property. For properties associated with a parcel, you assign districts to the parcel on the Parcel District page. For properties with an address, but no parcel, use the Address District page to assign districts to a property.</p>
Preexisting pending inspections	<p>If your agency supports pending inspections, the system prevents you from creating a new or duplicate inspection when an inspection of the same type is already pending. You can schedule the existing pending inspection.</p> <p>Use the Inspections section of the agency's Permit Options page to configure how your agency handles pending inspections.</p>
Incomplete required inspections before the final inspection	<p>You can't schedule a final inspection or assign a pending final inspection to an inspector until all of the required inspections for the permit are complete with a passing or corrected result.</p> <p>If one of multiple inspections selected is the final inspection and there are incomplete required inspections, you won't be able to create the final inspection. If the final inspection is in a pending status and there are incomplete required inspections, agency staff or applicants can't assign the inspection.</p> <p>Agencies identify required inspections and the final inspection in the setup on the Inspection Group page.</p> <p>If an inspection type is defined as required in the inspection group, but you turn off the <b>Required</b> switch when the inspection is created, then it's no longer considered a required inspection when completing the final inspection. The reverse is also true: You can turn on the <b>Required</b> switch to make the inspection required.</p>
Business license and business license transaction conditions	<p>Conditions on the business license or business license transaction such as Prevent Inspection Schedule, Prevent Inspection Result, or Prevent Final Inspection can prevent you from scheduling or providing results for an inspection or prevent you from adding or proceeding with a final inspection.</p>

Inspection Issue	Description
Business license fees due before the final inspection	<p>Agencies may configure a stop process action in the Business Rules Framework to prevent you from creating or scheduling a final inspection when fees are outstanding.</p> <p>The stop process action isn't triggered by requests made in the Oracle Inspector mobile app. However, requests sent from a browser running on a mobile device will still trigger the stop process action.</p> <p>Agencies configure stop process actions in the Business Rules Framework.</p>

For information about setting up inspection dependencies, required inspections, and the final inspection, see [Setting Up Inspection Groups](#).

For information about setting up cross-permit inspection dependencies, see [Setting Up Inspection Dependencies](#).

For more information about setting up a business rule to prevent final inspections when fees are due, see [Setting Up Stop Process Actions](#).

## Managing Inspections for a Business License Application

The business license activity details include a consolidated list of inspections related to a business license application. As agency staff, you manage inspection activity for a business license application—including status, inspection results, and more—on the Inspections page in the activity details.

As agency staff or a registered public user such as an applicant, business owner, or contact with application access, you use the Inspections page in the activity details to view a complete list of inspections for a business license application. Go to the list of inspections in the application details to perform these tasks:

- Manage inspection activity.
- Access inspection details.
- Request, schedule, postpone, reschedule, cancel, or claim an inspection.

**Tip:** You can access this page 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.

Here's how you can navigate to the list of inspections for a business license application:

1. Select the **Business License Transactions** tile on the agency springboard.
2. On the Transactions – Business Licenses page, click the row for the business license application you are working with.
3. Click **Inspections** in the left-hand navigation panel of the license activity details.

You can view the same information and perform many of the same actions on other inspection pages as well, including the Inspection request page for a business license application, the Inspections console page for agency staff, and the consolidated Inspections list page for registered public users. For more information about these pages, see [Requesting Inspections](#) and [Managing Inspections for an Agency](#). For information about using the Oracle Inspector mobile application, see [Managing Scheduled Inspections](#).

For more information about filtering inspections in grids, see [Managing Inspections for an Agency](#).



## Viewing Inspection Activity

1. On the business license transaction's Inspections list page, you can monitor inspection activity in these fields.


**Note:** If the physical location changes within the agency's jurisdiction, the address is updated for pending, requested, or scheduled inspections. If the physical location moves outside of the agency's jurisdiction, pending, requested, or scheduled inspections are canceled.

Page Element	Description
<b>Pending</b>	<p>Turn on the <b>Pending</b> filter switch to view only the inspections in a <i>Pending</i> status in the grid.</p> <p>Pending inspections can be manually created by agency staff or automatically created for an application type, depending on agency-level setup. Inspections are moved to a pending status when an inspection is postponed or indefinitely put on hold. Registered public users can only postpone inspections if allowed by the agency. For more information, see <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</p>
<b>Inspection</b>	<p>View the inspection number that was automatically generated based on the autonumbering definition in the inspection type.</p> <p>Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a>.</p>
<b>Inspection Type</b>	View the inspection type description. For example, Sign Inspection.
<b>Required</b>	Indicates whether this inspection type is required for the application. The agency determines which inspection types are required on the inspection group setup page or when an inspection is added by authorized agency staff.
<b>Status</b>	<p>View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:</p> <ul style="list-style-type: none"> <li>○ <i>Scheduled</i></li> <li>○ <i>Requested</i></li> <li>○ <i>Completed</i></li> <li>○ <i>Canceled</i></li> <li>○ <i>Pending</i></li> </ul> <p>When the <b>Pending</b> filter switch is on, you only see the inspections with a <i>Pending</i> status.</p>
<b>Inspector</b>	Identifies the inspector assigned to the inspection.

Page Element	Description
	<p>The date or date and time of the scheduled inspection is displayed beneath the inspector's name.</p> <p>Public users can't see the inspector name on inspections or request inspectors.</p>
<b>Property and City</b>	<p>View the address of the property and city associated with the inspection.</p> <p><b>Note:</b> If the physical location changes within the agency's jurisdiction, the address is updated for pending, requested, or scheduled inspections. If the physical location moves outside of the agency's jurisdiction, pending, requested, or scheduled inspections are canceled.</p>
<b>Preferred Date</b>	<p>Displays the preferred date and time for inspections configured with the <i>Request</i> scheduling method. Depending on your agency's setup, you may only be required to enter a date.</p>
<b>Ready-by Date</b>	<p>Displays the date and time when the work is ready to be inspected for inspections configured with the <i>Ready</i> scheduling method. Depending on your agency's setup, you may only be required to enter a date.</p>
<b>Scheduled</b>	<p>Displays the scheduled date or date and time for the inspection.</p> <p>Depending on your agency's setup, you may be required to enter only a date or time range, such as "Morning" or "Afternoon."</p>
<b>Completed</b>	<p>Displays the date and time when the inspection was completed.</p>
<b>Result</b>	<p>Displays the inspection result, such as whether the inspection passed or failed. For example, a business license inspection may show an Approved result.</p>
<b>Reinspection</b>	<p>For failed inspections that have been reinspected, this column displays the unique identifier for the reinspection.</p> <p>For reinspections, this column displays the unique identifier of the original failed inspection.</p> <p><b>Note:</b> Reinspection information appears after you submit a reinspection request. The <b>Reinspect</b> button is available for failed inspections.</p>

## Performing Actions on Inspections

Let's take a look at the actions available on the list of inspections for a business license application.

Page Element	Description
<b>Add Inspection</b>	<p>Click this button to request an inspection on the Inspection page. See <a href="#">Requesting Inspections</a>.</p> <p>You can't create a new or duplicate inspection when an inspection of the same type is already in a <i>Pending</i> status; you can schedule the existing pending inspection.</p>
	<p>Click the icon in the <b>Assign</b> column to assign an inspection to an inspector for a specific date or time on the Scheduling modal page. The icon appears only for users with the PSC Inspections Supervisor role. This column is not visible to registered public users.</p> <p>If an inspection is already assigned, but not yet completed, this button enables you to reassign the inspection.</p> <p><b>Note:</b> You'll receive a warning when you assign or reassign an inspection with prerequisite inspections that haven't passed or been corrected.</p>
<b>Reinspect</b>	<p>Click this button to access the Inspection request page where you can submit a reinspection request for a failed inspection. The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.</p> <p>For more information on the Inspection page, see <a href="#">Requesting Inspections</a>.</p>

You can access more actions by clicking the actions icon in the **Actions** column:



Select one of the available actions in the drop-down menu:

- **Cancel Inspection**
- **Reschedule**
- **Postpone**
- **View Request**
- **View Detail**
- **Assign to Me**

For information about canceling, rescheduling, and postponing inspections, see [Modifying Inspection Requests](#).

The table here describes the options for viewing the inspection request, viewing inspection detail, and claiming an inspection.

Page Element	Description
<b>View Request</b>	Click to review, update, or cancel an inspection on the Inspection request page. For more information about inspection requests, see <i>Requesting Inspections</i> .
<b>View Detail</b>	Click to view the inspection details on the Inspection Detail page. See <i>Reviewing Inspection Details</i> .
<b>Assign to Me</b>	<p>Claim a scheduled inspection assigned to another inspector. This action is available when the inspector who claims the inspection has the Building Inspector job function with district and inspection type job attributes that match the inspection's district and type attributes.</p> <p>If you want to reschedule the inspection, click the <b>View Detail</b> action to select a new date and time on the Inspection Detail page. Depending on your agency's configuration, you may only be able to select a date.</p> <p>Inspectors can also claim inspections on the Inspections console page and in the Oracle Inspector mobile application.</p>

## Managing Inspections for an Agency

Agency staff and system administrators manage activity for all of the agency's inspections on the Inspections console page.

Use the Inspections console page to view a complete list of inspections for every application. From this page you can manage the full inspection life cycle. Here are some of the actions agency staff with required job roles and job attributes can perform on inspections:

- Add inspections.
- Request reinspections for failed inspections.
- Manually assign or reassign individual inspections.
- Automatically assign or reassign multiple inspections at once.
- View inspection details.
- View inspection request.
- Cancel, reschedule, and postpone inspections.
- View pending inspections.
- Claim inspections assigned to another inspector.

When applicants and contacts with permit or business license access click the Inspections tile on their landing page after logging in, they see a modified version of the Inspections console page. From the list, the user can access inspection details and schedule additional inspections for the permits and business licenses they are associated with.

**Tip:** You can access this page 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.

**Note:** Agencies may only allow inspections to be performed after prerequisite inspections are completed, but agency staff can override dependency requirements when assigning, reassigning, or scheduling inspections. For information about setting up inspection dependencies, see [Setting Up Inspection Groups](#).

## Filtering Inspection Information

1. Select the **Inspections** tile on the agency springboard.
2. Use the drop-down boxes at the top of the page in combination to filter the displayed inspections by date. Your agency can choose the default values for the date type and time period fields in the agency-level setup options. For more information, see [Setting Up Agencies](#).

Here are the types of dates you can filter by:


- o **Requested** - Displays inspections that were requested. The status can be *Requested* or *Canceled*.
- o **Unassigned** - Displays inspections with no inspector assigned and the status is *Requested*.
- o **Scheduled** - Displays inspections that were scheduled. The status can be *Scheduled* or *Canceled*.
- o **Completed** - Displays inspections with a *Completed* status.
- o **All Date Types** Displays inspections with all of the listed date types.

The time periods you can filter by are:

- o **Today**
- o **Yesterday**
- o **Tomorrow**
- o **Last 14 Days**
- o **Next 14 Days**
- o **Last 30 Days**
- o **Next 30 Days**
- o **Date Range**

For example, if you want to view the inspections scheduled for today and the next two weeks, select **Scheduled** and **Next 14 Days**.

3. Use the **Filter By** options to apply different filters:

Page Element	Description
<b>Pending</b>	Turn on the switch to show inspections with a pending status.
<b>My Job</b>	Turn on the switch to view only the inspections assigned to the logged in user.
	Click the <b>Filter By</b> button to open the <b>Filter By</b> panel fields for customizing your filter. For more information, see <a href="#">Using Grids</a> .

Page Element	Description
<b>Reset</b>	<p>Click to clear all of your filter, search, and sort selections and return to the agency's default settings. This button appears only when filters are applied.</p> <p>Your selections for the <b>Date Type</b> and <b>Date Range</b> filter fields as well as the <b>Pending</b> and <b>My Job</b> switches are maintained while you work until you intentionally clear them or log out, ending your session.</p>

Once you apply these filters, your settings remain throughout your online session on the **All, Permits,** and **Business Licenses** tabs of the Inspections console page. The system automatically resets to the default display when you open a new session.

## Viewing Inspection Information

1. Select the **Inspections** tile on the agency springboard.
2. On the Inspections console page, you can view inspection information on three tabs, depending on the offerings implemented by your agency:
  - o **All** - View all inspections.
  - o **Permits** - View permit inspections.
  - o **Business Licenses** - View business license inspections.
3. On each tab, you can view inspection information including these fields:

**Note:** The way the columns are displayed in the inspections grid may vary depending on the grid format selected by your agency. For information about expanded and condensed grid formats and common grid controls, see *Using Grids* and *Personalizing Grid Displays*.

Page Element	Description
<b>Inspection and Inspection Type</b>	<p>Displays the automatically generated inspection number and the inspection type.</p> <p>Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <i>Setting Up Inspection Types</i>.</p> <p>The inspection type is displayed beneath the inspection number in the condensed grid format.</p>
<b>Required</b>	<p>Indicates whether this inspection type is required for the application. The agency determines which inspection types are required on the inspection group setup page or when an inspection is added by authorized agency staff.</p>
<b>Status</b>	<p>View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:</p>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Scheduled</i></li> <li>○ <i>Requested</i></li> <li>○ <i>Completed</i></li> <li>○ <i>Canceled</i></li> <li>○ <i>Pending</i></li> </ul> <p>The inspection status is displayed beneath the inspection type in the condensed grid format.</p>
<b>Classification</b>	Appears on the <b>All</b> tab to distinguish between inspections created for <i>Permits</i> and <i>Business Licenses</i> .
<b>Application</b> and <b>Application Type</b>	<p>Displays the automatically generated application number or ID associated with the inspection. Click the application ID link to access the overview or summary page for the application.</p> <p>For more information on application types with inspections, see <a href="#">Setting Up Permit Types</a> or <a href="#">Setting Up Business License Types</a>.</p>
<b>Relationship Type</b>	For permit inspections only, indicates whether the inspection is associated with the primary permit ( <i>Primary</i> ) or one of its subapplications ( <i>Subapplication</i> ). You can click the column title to change the sort order to display inspections associated with primary permits or with subapplications first.
<b>Relationship Details</b>	For permit inspections only, a <b>View Subapplications</b> link is displayed when the permit associated with the inspection is a primary inspection. When the permit associated with an inspection is a subapplication, the primary permit number appears as a link to the primary permit.
<b>Activity</b>	Appears on the <b>All</b> and <b>Business Licenses</b> tabs for business license inspections to identify the business license application activity: <i>Origination</i> , <i>Renewal</i> , or <i>Amendment</i> .
<b>Description</b>	Displays the application description entered during application intake or on the application's overview page.
<b>Doing Business As</b>	Appears on the <b>All</b> and <b>Business Licenses</b> tabs for business license inspections to display the name the business is running under (also known as DBA).
<b>Property</b> and <b>City</b>	<p>Displays the address of the property and city associated with the inspection.</p> <p>You can sort the <b>Property</b> column by the street name, first line of an address, or city by clicking the arrow icon on the column header and selecting <i>Street</i>, <i>Address</i>, or <i>City</i> in the condensed grid format.</p>

Page Element	Description
<b>Preferred Date</b>	<p>Displays the preferred date and time or time period for the requested inspection if the scheduling method for the inspection type is <i>Request</i>.</p> <p>If your agency sets up the <i>Request</i> scheduling method in permits or business licenses to show the date only, you won't see the time range in the <b>Preferred Date</b> column.</p>
<b>Ready-by Date</b>	<p>Displays the date and time or time period when the requested inspection is ready if the scheduling method for the inspection type is <i>Ready</i>.</p> <p>If your agency sets up the <i>Ready</i> scheduling method in permits or business licenses to show the date only, you won't see the time in the <b>Ready-by Date</b> column.</p>
<b>Scheduled</b>	<p>Displays the scheduled date, date and time, or time period for the inspection. If your agency sets up the <i>Schedule</i> scheduling method in permits or business licenses to show the date only, you won't see the time in the <b>Scheduled</b> column.</p>
<b>Completed</b>	<p>Displays the date and time when the inspection was completed.</p>
<b>Preferred Inspector</b>	<p>Displays the preferred inspector requested for the inspection.</p>
<b>Inspector</b>	<p>Displays the name of the inspector assigned to the inspection.</p>
<b>Result</b>	<p>Displays the inspection result, such as whether the inspection passed or failed. For example, a business license inspection may show an <i>Approved</i> result.</p>
<b>Reinspection</b>	<p>Displays reinspection information after a reinspection request has been submitted.</p> <ul style="list-style-type: none"> <li>○ If the inspection row is for a reinspection, this column displays the unique identifier of the original failed inspection.</li> <li>○ If the inspection row is for a failed inspection that has been reinspected, this column references the unique identifier of the reinspection.</li> </ul>

## Performing Actions for Inspections



Let's take a look at the actions available on the list of inspections created within an agency.

1. Select the **Inspections** tile on the agency springboard.



2. On the Inspections console page, you can perform the following actions for an inspection:

**Note:** Agency staff receive a warning when adding an inspection with prerequisite inspections that haven't passed or been corrected.

Page Element	Description
<p><b>Add Inspection</b></p>	<p>Click the button request inspections for an application. You can also add an inspection using the <b>Actions</b> menu in the inspection row. See <i>Requesting Inspections</i>.</p> <p>If your agency supports pending inspections, the system prevents you from creating a new or duplicate inspection when an inspection of the same type is already pending. You can schedule the existing pending inspection.</p>
	<p>Click the <b>Select Multiple</b> button as the first step for automatically assigning or reassigning multiple inspections in a batch. Select the inspections you want to assign then click <b>Assign</b>.</p> <p>For more information, see <i>Assigning Inspections</i>.</p>
	<p>Click the <b>Assign</b> icon to manually assign an inspection to an inspector for a specific date and time on the Scheduling modal page. The icon appears only for users with the PSC Inspections Supervisor role.</p> <p>If an inspection is already assigned, but not yet completed, you can use this button to reassign the inspection.</p> <p><b>Note:</b> You'll receive a warning when you assign or reassign an inspection with prerequisite inspections that haven't passed or been corrected.</p> <p>For more information, see <i>Assigning Inspections</i>.</p>
<p><b>Reinspect</b></p>	<p>Click this button for a failed inspection to access the Inspection Request page where you can submit a reinspection request for a failed inspection. The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.</p> <p>For more information on the Inspection Request page, see <i>Requesting Inspections</i>.</p>

3. You can access more actions by clicking the actions icon in the **Actions** column:



Select one of the available actions in the drop-down menu:

- **Add Inspection**
- **Cancel Inspection**
- **Reschedule**
- **Postpone**
- **View Request**
- **View Detail**
- **Assign to Me**

For information about canceling, rescheduling, and postponing inspections, see *Modifying Inspection Requests*.

The table here describes the options for adding an inspection, viewing the inspection request, viewing inspection detail, and claiming an inspection.

**Actions available when you click the Actions icon on the Inspections page**

Page Element	Description
<b>Add Inspection</b>	Click to request additional inspections for the permit associated with the inspection. See <i>Requesting Inspections</i> .
<b>View Detail</b>	Click to view the inspection details on the Inspection Detail page. See <i>Reviewing Inspection Details</i> .
<b>View Request</b>	Click to review, update, or cancel an inspection on the Inspection Request page. See <i>Requesting Inspections</i> .
<b>Assign to Me</b>	<p>Claim a scheduled inspection assigned to another inspector. This action is available when the inspector who claims the inspection has the Building Inspector job function with district and inspection type job attributes that match the inspection's district and type attributes.</p> <p>If you want to reschedule the inspection, click the <b>View Detail</b> action to select a new date and time on the Inspection Detail page.</p> <p>Inspectors can also claim inspections on the Inspections page in the application details and in the Oracle Inspector mobile application.</p>

## Requesting Inspections

Agency users can request inspections for permits and business license applications to ensure compliance with application requirements.

You can request, modify, and cancel inspection requests on the Inspection request page. For information about adding, updating, or canceling scheduled inspections in the Oracle Inspector mobile application, see *Managing Scheduled Inspections*.

You can create or update inspections from these pages:

- Agency staff, applicants, and contacts with permit access can use the Inspections page in the permit details.  
See *Managing Inspections for a Permit*.
- Agency staff, applicants, business owners, and contacts with business license application access can use the Inspections page in the business license activity details.  
See *Managing Inspections for a Business License Application*.
- Agency staff only can use the Inspections console page.  
See *Managing Inspections for an Agency*.
- Only applicants and contacts with application access, including the business owners for business licenses, can use the Inspections list page by clicking the **Inspections** tile on the registered public user landing page.

Registered public users can also select *Schedule an Inspection* in the **I Want To** field on the registered public user landing page.

For inspection request considerations, such as issues that prevent an inspection from being created or scheduled, see *Overview of Working with Inspections*.

## Requesting an Inspection

1. Click the **Add Inspection** button or in the action menu for an inspection, select the *Add Inspection* option.
2. On the Inspection request modal page, select the **Application** for which you want to request an inspection.

**Note:** If you are requesting an inspection from the Inspections page for a specific application, the **Application** and **Application Type** fields already reflect the selected permit or business license application on the modal page.

- You'll see the inspection types that are available to select based on the inspection group that is associated with the permit or business license application type.

**Note:** Agency staff can select the **Show All Inspection Types** check box to make all inspection types available for selection. This check box isn't available to public users.

For each inspection type listed on the Inspection modal page, you'll see this information:

Element	Description
<b>Inspection Type and Description</b>	Indicates the inspection type code and description.
<b>Dependencies</b>	Lists the prerequisite inspections.
<b>Required</b>	Indicates that this inspection type is required.
<b>Final Inspection</b>	Indicates that this is the last inspection that needs to be done.

- Select the check box next to each **Inspection Type** that you want to add. You can't select multiple inspections in small form factor or through the Oracle Inspector mobile application.
- Select the **Pending** check box to set the status of the inspections to *Pending*. This option is available only if the **Enable Creation of Pending Inspections** switch is turned on for the agency. For more information, see [Setting Up Agency-Level Options for Permits](#).

**Note:** This switch is not available to registered public users.

6. Click **Continue** to access the Inspection request page.

The request page for a single inspection looks like this.

The **Select a Time** button is available because the inspection was set up with the Schedule method.

The screenshot shows the Oracle Inspection request page for a "Water Heater Inspection". At the top, there are three links: "Update Dependencies", "View Dependencies", and "View Subapplications". On the right side, there are "Cancel" and "Submit" buttons. The main content area is divided into two sections: "Inspection" and "Inspection Schedule".

**Inspection Section:**

- Pending:** A toggle switch is currently turned off.
- Required:** A toggle switch is currently turned on.
- Application:** RESADD-2023-00051
- Application Type:** Residential Addition
- Comments:** A text input field.
- Address:** 3273 Central Avenue, ALAMEDA, California 94501
- Inspection Location:** A text input field.
- Location Contact:** John Firestone
- Contact Methods:** A dropdown menu showing "Email".
- \* Email:** john.firestone@oracle.com

**Inspection Schedule Section:**

- Select a Time:** A button to select a time for the inspection.

If you selected more than one inspection type, they are all displayed in the **Selected Inspections** grid as shown here.

Each inspection has a different scheduling method. The inspection with the preferred date and time fields has the Request scheduling method, and the inspection with the **Select a Time** button has the *Schedule* scheduling method.

[Update Dependencies](#)   [View Dependencies](#)   [View Subapplications](#)

### Inspection

**Pending**

**Application** RESADD-2023-00051

**Application Type** Residential Addition

**Comments**

**Address** 3273 Central Avenue  
ALAMEDA, California 94501

**Inspection Location**

**Location Contact** John Firestone

**Contact Methods** Email

**\* Email** john.firestone@oracle.com

**Selected Inspections**

Inspection Type	Description	Required	Select Time	Date	Time	
Electrical	Temp Power Pole	<input type="checkbox"/>		<input type="text"/>		<input type="button" value="🗑"/>
Water Heater	Water Heater Inspection	<input type="checkbox"/>	<input type="button" value="Select a Time"/>			<input type="button" value="🗑"/>

7. Turn the **Required** switch on or off. The **Required** switch defaults to the inspection type setting on the Inspection Group Details page. If the inspection is outside of the inspection group, the setting defaults to Not Required.
8. Depending on the scheduling method set up for the inspection type, agency staff and applicants can enter times in the preferred date and time fields or ready-by date and time fields, or select a time. Depending on agency setup, only date fields or date and a time range may be available.

The **Select a Time** button appears only for inspection types with a **Scheduling Method** of *Schedule*. See the section, "Selecting an Inspection Time" for more information.

9. (Optional) Click the **Delete** button to remove any inspection types that you don't want to include in your inspection request.
10. Click **Submit**.

The **Update Dependencies**, **View Dependencies**, and **View Subapplications** links available on the Inspection request page are also available on the Inspections page in the permit details. For information about updating and viewing dependencies, see [Working with Inspection Dependencies](#). For information about working with subapplications, see [Working with Linked Permits](#).

If the Inspection Requested communication event is configured, the system automatically creates an email notification that an inspection request has been created. For more information, see [Delivered Communication Events](#).

## Selecting an Inspection Time

The **Select a Time** button on the Inspection request page appears only for inspection types with a **Scheduling Method** of *Schedule* and a **Time Entry Method** of *Specific time* or *Time range*. Both agency staff and applicants can select a time on the Scheduling modal page. Only inspections supervisors can see the inspector names and override availability.

The dates and times that are available for inspection scheduling are based on the following factors:

- Type of inspection and when the inspection can be performed.
- District of the parcel or district associated with the address.
- Inspectors assigned to the district and inspection type.
- Availability of the inspectors according to work schedules, holiday schedules, and inspection calendars.

An inspector's availability may also depend on whether your agency has set up a maximum daily inspection count for date-only inspection scheduling.

After you select a time and submit the request, the **Reschedule** button is available to select a different time.

For more information on scheduling inspections as a supervisor, see [Managing Inspections for an Agency](#).

For more information, see [Setting Up Inspection Scheduling](#) and [Setting Up Inspection Assignment](#).

## Updating an Inspection Request

You can update an inspection request on the Inspection request page, such as making an inspection required or claiming an inspection. You can't update an inspection if the status of the inspection is *Canceled* or *Completed*, and you can't change the inspection type for an inspection.

For information about canceling, rescheduling, or postponing an inspection as well as the other available actions, see [Modifying Inspection Requests](#).

1. In the action menu for an inspection, select the *View Request* option.
2. Turn the **Required** switch on or off to override the default required inspection setting for the inspection. The **Required** switch defaults to the inspection type settings on the Inspection Group Details page. If the inspection is not part of the inspection group, the setting defaults to not required.
3. If the link is available, you can click **Assign to me** to claim an inspection assigned to another inspector. The inspector who claims the inspection must have the Building Inspector job function for permit inspections or the Business License Inspector job function for business license inspections, with district and inspection type job attributes that match the inspection's district and type attributes.  
When an inspector claims the inspection, they can also select a new inspection date or date and time. If the Inspection Rescheduled communication event and template are configured by your agency, the system generates a notification when you reschedule the inspection.
4. Click **Save**.

## Interactive Voice Response Inspection Requests

When interactive voice response (IVR) is enabled for your agency, registered public users can request inspections over the phone. IVR is compatible with the *Request* and *Schedule* scheduling methods. Regardless of which of these two scheduling methods is associated with an IVR inspection request, a user chooses a preferred date and time period (morning or afternoon). For inspections with a *Request* scheduling method, the selected date and time period are

recorded as the **Preferred Date** and **Preferred Time**. For inspections with a *Schedule* scheduling method, the system uses the selected date and time period to automatically assign a specific time slot and inspector.

For more information on IVR, see [Setting Up Agency-Level Options for Permits](#).

## Modifying Inspection Requests

You can reschedule, postpone, or cancel an inspection, depending on different factors, including the scheduling method of the inspection type and agency settings for public users.

Agency staff can always cancel inspections and postpone scheduled or requested inspections, but registered public users can only postpone or cancel inspections based on the agency-level options for permits and business licenses. Agency staff and registered public users can modify an inspection request on the Inspection request page and Inspections list pages. Registered public users can only cancel an inspection on the inspection request page, if allowed at the agency-level for permits and business licenses.

**Note:** You can't reschedule, postpone, or cancel an inspection if the time falls after the schedule change cutoff time set up by the agency. For more information about schedule change policies, see [Setting Up Inspection Types](#).

This table provides details about when you can cancel, postpone, and reschedule inspections, based on the scheduling method of the inspection type and the inspection status.

Scheduling Method	Inspection Status	Actions
Request	<i>Pending</i>	<b>Cancel Inspection</b>
	<i>Requested</i>	<b>Postpone</b> <b>Cancel Inspection</b>
	<i>Scheduled</i>	<b>Reschedule</b> <b>Postpone</b> <b>Cancel Inspection</b>
Ready	<i>Pending</i>	<b>Cancel Inspection</b>
	<i>Requested</i>	<b>Postpone</b> <b>Cancel Inspection</b>
	<i>Scheduled</i>	<b>Reschedule</b> <b>Postpone</b> <b>Cancel Inspection</b>
Schedule	<i>Pending</i>	<b>Cancel Inspection</b>



Scheduling Method	Inspection Status	Actions
	<i>Scheduled</i>	<b>Reschedule</b> <b>Postpone</b> <b>Cancel Inspection</b>

## Canceling an Inspection

Agency staff can manually cancel inspections, and registered public users can cancel their inspections, depending on the agency-level setup for permits or business licenses. Inspections are also canceled automatically when an agency staff member withdraws the application associated with the request. Canceling an inspection permanently removes the inspection appointment; if needed, you can schedule a new inspection.

**Note:** Depending on agency-level setup for permits or business licenses, public users may be able to cancel any of their inspections, none of them, or only the inspections that aren't required for the application. Registered public users only see the **Cancel Inspection** button, when available, on the Inspection request page. For more information, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Business Licenses](#).

The **Cancel Inspection** action isn't available for inspections with a status of *Canceled* or *Completed*. In addition, the action isn't available once the time to the scheduled inspection is less than the number of hours defined in the **Schedule Change Policy** field for the inspection type.

1. Select the **Cancel Inspection** option.
2. Enter a **Cancellation Reason** on the Cancel Inspection modal page. Your agency may require comments, depending on settings in the agency options.
3. Click **Confirm**.

When you or the applicant cancel an inspection, the applicant, inspection contact, inspector, and inspection supervisor may receive a notification, depending on the communication template setup.

## Rescheduling an Inspection

Agency staff and registered public users can select the **Reschedule** option to remove inspections from the schedule and request or select a different time or date, depending on the scheduling method for the inspection type. For inspections configured with the *Ready* scheduling method, you enter a new date and time when the work is ready to be inspected. For inspections configured with the *Request* scheduling method, you enter a new preferred date and time. Depending on your agency's setup, you may only be required to enter a date.

If an inspection time has already been selected for an inspection with the *Schedule* scheduling method, agency staff can click the **Select a Different Time** button to select a different inspection date or date and time on the Scheduling modal page.

**Note:** The **Reschedule** option isn't available once the time to the scheduled inspection is less than the number of hours defined in the **Schedule Change Policy** field for the inspection type.

When you or the applicant reschedule an inspection, the applicant, inspection contact, inspector, and inspection supervisor can receive a notification, depending on the communication template setup.

## Postponing an Inspection

Select the **Postpone** option to take an inspection off the schedule. This action moves the inspection into the *Pending* status. You can postpone inspections that have been requested or scheduled status when you want to wait to schedule the inspection. Agency staff can always postpone inspections, but registered public users can only postpone or cancel inspections based on the agency-level options for permits and business licenses.

## Assigning Inspections

Inspection supervisors can assign inspections one at a time or in a batch using the automatic assignment process.

They can assign inspections they are responsible for based on the inspection type and inspection district on the Inspections console page for agency staff and on the Inspections page in the permit or business license application details.

For more information about assigning inspections from the inspections console, see *Managing Inspections for an Agency*. For more information about assigning inspections in the transaction details, see *Managing Inspections for a Permit* and *Managing Inspections for a Business License Application*.

For more information about setting up the inspection supervisor job function and attributes for inspection supervisors to assign inspections, see *Setting Up Agency Staff*.

## Inspection Assignment Considerations

Agencies may configure the system to prevent you from assigning a final inspection when permit fees are due. For more information, see *Setting Up Stop Process Actions*.

Agencies may also only allow inspections to be performed after prerequisite inspections are completed, but agency staff can override dependency requirements when assigning, reassigning, or scheduling inspections. For information about setting up inspection dependencies, see *Setting Up Inspection Groups*.

For more considerations about requesting or scheduling inspections, see *Requesting Inspections*.

## Assigning an Inspection

1. Click the **Assign** button to manually assign an inspection to an inspector:



**Note:** Agency staff can override the requirement to complete prerequisite inspections with a passing or corrected result before assigning the inspection.

The Scheduling modal page lists the dates that are available for you to schedule the inspection, starting with the date in the **From Date** field. The default value of this field depends on the scheduling method of the inspection:

Scheduling Method	From Date Default Value
Request	The preferred date when it is after the current date, or the current date when the preferred date is on or before the current date.
Ready	The ready-by date when it is after the current date, or the current date when the ready-by date is on or before the current date.
Schedule	The current date.

Scheduling Method	From Date Default Value

This example illustrates the Scheduling modal page for an inspections supervisor. Inspections supervisors can see the inspector names and override availability.

### Scheduling ✕

**Application** BusLic-DEC2022-0195

**Inspection Type** 107 Driveway

**Preferred Date** 2/13/23

**Duration in Hours** 1

**District** Combination B

▲ Override Availability

**Inspector**

**Date**

**Time**

From Date

	Date	Inspector	Time	Select
<input type="checkbox"/>	Monday, March 13, 2023	Martha Paxton	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Monday, March 13, 2023	Kaitlyn Haney	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Monday, March 13, 2023	Tim Sandor	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Monday, March 13, 2023	Kenny Dalglish	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Tuesday, March 14, 2023	Martha Paxton	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Tuesday, March 14, 2023	Kaitlyn Haney	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Tuesday, March 14, 2023	Tim Sandor	9:00 AM ▼	<input type="button" value="Select"/>
<input type="checkbox"/>	Tuesday, March 14, 2023	Kenny Dalglish	9:00 AM ▼	<input type="button" value="Select"/>

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[Get More Time Slots](#)

2. Select an available **Time** from the drop down list and click **Select** next to the inspector and date on which you want to schedule the inspection.

**Note:** A flag icon appears next to preferred inspectors.

If an inspector is not available for the date and time that you want, inspections supervisors can expand the **Override Availability** section of the modal page to manually assign an inspector for a specific date and time. Select the **Inspector**, **Date**, and **Time** and click **Select** to assign the inspection. This is useful when supervisors need to load balance inspectors and ensure that each inspection is assigned to an inspector.

If the Inspection Scheduled communication event is configured, the system can automatically create an email notification to the inspector and inspection contact when the inspection has been scheduled and assigned to the inspector. For more information, see [Delivered Communication Events](#).

## Assigning Inspections in Batch

You may be able to assign some inspections in a batch but not others because of inspection dependencies. Agency staff can override the requirement to complete prerequisite inspections with a passing or corrected result before assigning inspections.

1.

Click the **Select Multiple** button on the Inspections console page for agency staff:



2. Select the check box next to each inspection that you want to automatically assign.
3. Click **Assign** to run the automatic batch assignment process. The process assigns inspections based on:
  - o Holiday schedules
  - o Inspection calendars
  - o Inspector availability
  - o Inspector qualifications
  - o Work schedules

For more information on these inspection scheduling factors, see [Setting Up Inspection Scheduling](#).

4. On the Assign modal page, you can select individual inspectors to exclude them from the assignment pool. You can also select the **Exclude District** check box to remove the inspection district from the assignment matching criteria.
5. Click **OK** to run the assignment process.

Supervisors receive an error message if there are no time slots available for an inspection selected for assignment. This can occur when:

1. The ready by or preferred date is more than 14 days after the day you're running the batch assignment.
2. There are time slots available, but none of them are before the expiration date.
3. No qualified inspectors have availability in the next 14 days.

## Viewing Assigned Inspections

Inspectors and inspection supervisors can view details about all inspections, including inspections assigned to them, on pages they access from their laptops or desktops. They can also view the inspections assigned to them in a calendar

on the Oracle Inspector mobile application. Inspection supervisors view daily inspections for the inspection types and districts they are responsible for using Oracle Inspector.

Inspection assignments are based on attributes, such as inspection type and inspection district, that are associated with the job functions. For more information about inspection job functions and attributes, see [Setting Up Agency Staff](#).

## Viewing Inspections Assigned to Me

As a building inspector, business license inspector, or inspection supervisor, you can find the inspections assigned to you on the Task Management page on your desktop or laptop:

1. Select the **My Inspections** link on the agency springboard.
2. The Task Management page opens with a predefined filter to select tasks with the *Inspection* type.

You can also use the filter button to filter by additional parameters, including task name, application ID, transaction type, status, last updated date, or assigned by.

Inspection assignments appear in the task grid.

3. Click the **View More Details** button for a permit record to open the Inspection Detail page.

You can also view your assigned inspections on the Inspections tabs in the Worklist and on the Inspection Tasks page in the Oracle Inspector mobile application. See [Viewing Tasks in the Worklist](#) and [Viewing Inspection Tasks](#), respectively.

For information about inspection details for a permit, see [Reviewing Inspection Details](#).

## Viewing All Assigned Inspections

Agency staff including inspectors and inspection supervisors can view all assignments on the Inspections page accessed using a desktop or laptop:

1. Select the **Inspections** tile on the Agency Springboard or in the global navigation go to **Inspections > Inspections**.
2. Click the **Request Inspection** button to open the Inspection Request page to begin the scheduling process.

For more information about scheduling an inspection, see [Requesting Inspections](#).

3. In the **Actions** column, you can select *View Request* or *View Detail*, which opens the inspections information for a permit in the permit details pages.

## Viewing the Daily Schedule for Inspections in Oracle Inspector

The Inspection Tasks page, which includes the **My Inspections** and **All Inspections** tabs, provides a daily calendar view with inspections organized by scheduled date and time or date only, depending on agency configuration of the scheduling methods.. Overdue inspections from previous days appear at the top of the list in a collapsible section.

1. Click the **Navigator** button in the global banner.
2. Select **Inspections > Mobile Inspections**.
3. The Inspection Tasks page opens in Oracle Inspector. As an inspector or inspector supervisor, you can:
  - o Click the **All Inspections** tab to view the daily inspections for the inspection types and districts you are responsible for. The list of inspections shows inspection information including the inspector's name.
  - o Click the **My Inspections** tab to view a list of your daily scheduled inspections and summary information.
4. Click the inspection task row to open the Inspection Details page. From here you can review or perform the inspection.

For more information about using the Oracle Inspector mobile application to view assigned inspections, see [Viewing Inspection Tasks](#).

## Reviewing Inspection Details

You keep track of the details for an inspection, including the inspection location, schedule, results, and contact information, on the Inspection Detail page. This topic discusses the details page available on your desktop or laptop.

Agency staff, applicants, and others with application access can view inspection details for a permit or business license application listed on the Inspections page in the application details.

For information about accessing inspection details from the Task Management page, see [Viewing Assigned Inspections](#).

When inspectors perform an inspection using Oracle Inspector on a phone, they access the inspection details from the calendar on the Inspection Tasks page. For more information, see [Working with Inspection Details](#).

## Reviewing the Inspection Details for an Application

To navigate to inspection details associated with an application:

1. Select the **Business License Transactions** or **Permits** tile on the agency springboard.
2. On the Transactions page, click the row for the permit or business license application you are working with.
3. Click **Inspections** in the left navigation panel to open the list of inspections in the right panel.
4. Click the three-dot **Actions** menu in an inspection row and select **View Details**.
5. On the Inspection Detail page, review the header information:
  - o Inspection number and type.
  - o Application number and type: Click the application number link to open the application details.
  - o Activity type, for business license inspections only: *Origination, Renewal, or Amendment*.
6. Review the inspection location and application description. Business license inspections also list the business name in the **Doing Business As** field.
7. You can review inspection information in each section:

Page Elements	Description
<b>Schedule</b> section	<p>Review information about the inspection schedule:</p> <ul style="list-style-type: none"> <li>o Inspection status</li> <li>o Inspection date</li> <li>o Inspector arrival time: Shows the time or time frame in which the inspector will arrive. The display of the value is based on the agency-level settings for permit and business license inspections. Depending on agency configuration, you may see a date only.</li> </ul> <p>For more information, see the inspection options in <a href="#">Setting Up Agency-Level Options for Permits</a> and <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</p> <ul style="list-style-type: none"> <li>o ETA: Shows the expected time of arrival of the inspector, if the inspector has updated the information.</li> </ul> <p>This field is not visible if the value is not updated.</p>



Page Elements	Description
	<ul style="list-style-type: none"> <li>○ The cancellation reason for inspections with a <i>Canceled</i> status.</li> <li>○ The method of scheduling such as Interactive Voice Response (IVR), manual, automatic, online (from a public user), data migration, or upgrade.</li> <li>○ The name of the person who created the inspection and the date.</li> <li>○ Name of the person who last updated the schedule and the date.</li> </ul> <p>For more information about inspection schedules, see <a href="#">Requesting Inspections</a>.</p>
<b>Result</b> section	<p>Review the inspection results, rating, score, and number of major violations of completed inspections.</p> <p>For more information about results, see <a href="#">Viewing Inspection Results</a>.</p>
<b>Contact</b> section	<p>Review the contacts, including the assigned inspector, and the location contact and phone number, email address, or a text message. Any comments added by the requester during scheduling appear in this section.</p>
<b>Signature</b> section	<p>View the signatures added when the inspection is complete in the Oracle Inspector mobile application. Signatures are required depending on the inspection setup.</p>

8. To view a report of the inspection summary for completed inspections, click **View Summary Report**.
9. To access other details about the application, click the application number link under the Inspection heading. For more information, see [Navigating to Business License Activity Details](#) or [Working with Permit Details](#).

## Recording Time for Permit Inspections

Agency staff can use the Time Recording page to record the time they spend on permit inspections. Time recording isn't available for business license inspections. For more information, see [Adding Time Entries](#).

## Viewing Inspection Documents

You view documents attached to the inspection at the inspection, checklist, or checklist item levels. The documents are for reference after the inspector added them during the inspection using the Oracle Inspector mobile application.

You view documents attached to the inspection at the inspection, checklist, or checklist item levels on the inspection attachments page.

1. Select the **Business License Transactions** or **Permits** tile on the agency springboard.
2. On the Transactions page, click the row for the permit or business license application you are working with.
3. Click **Inspections** in the left navigation panel to open the list of inspections in the right panel.
4. Click the three-dot **Actions** menu in an inspection row and select **View Details**.

- On the Inspection Detail page, click **Attachments** in the left navigation panel to review the following information on the Attachments page:

Page Element	Description
<b>File Information</b>	View the following information in the <b>File Information</b> column: <ul style="list-style-type: none"> <li>File name with file type extension</li> <li><i>File Size</i></li> <li><i>Uploaded By</i> user name</li> <li><i>Uploaded On</i> date</li> </ul>
<b>Description</b>	View the description of the attachment as entered by the person who added the attachment.
<b>Source</b>	View the level at which the document was added. In the Oracle Inspector mobile application, inspectors can add documents at the inspections level, at the checklist level, and at the checklist item level.
<b>Reference</b>	View the checklist name and checklist item name associated with the document, if applicable.
<b>Actions</b>	Click the actions icon to select and perform an action: <ul style="list-style-type: none"> <li><i>View Details</i> - Open the details modal page to view the attachment details.</li> <li><i>Download</i> - Click to save the document to your computer.</li> </ul>

- Click the **Filter By** button to view attachments filtered by these fields:
  - File Name
  - Description
  - Uploaded By
  - Uploaded On
  - Source
  - Checklist
  - Checklist Item
- To find a specific attachment, you can enter values in the search field.

*Related Topics*

- [Working with Attachments](#)

## Viewing Inspection Results

The inspector performs an inspection by assessing whether building requirements for the permit or code requirements for the business license application have been met. This topic discusses how results are calculated when using automatic calculation.

The agency can setup up inspections to use manual scoring or automatic score calculation with the bottom up scoring method. Scoring bottom to top indicates that the inspector starts with a zero score and adds points for each criterion that is met. The higher the score, the better the results.

A permit or business license application might require one or more inspections, each inspection might have one or more checklists, and each checklist might have checklist items or not, depending on the inspection configuration. The inspector performs an inspection by assessing the checklist items, if any, then checklists, and up to the inspection level. The evaluation results that the inspector enters are rolled up to the next level until final inspection results are calculated.

At the end of an inspection, comments and the final assessment determined during the inspection are displayed in the permit or business license application details for the agency staff and the applicant, on a desktop or laptop. Review these permit pages:

- Overview page
- Inspections list page
- Inspection Detail page

You can both submit and review inspection results for your inspections on your mobile device in Oracle Inspector. For more information, see [Submitting Inspection Results](#).

Page Element	Description
<b>Result</b>	View the final result of the inspection based on the passing rule defined by your agency. If scoring is used, the result appears after you complete the inspection checklists and submit a complete inspection with required signatures. If scoring is not used, the result displayed is the result you enter manually.
<b>Rating</b>	View the inspection rating, which is based on the range of scores defined by the agency.
<b>Score</b>	View the inspection score, if scoring is used, as defined on the inspection type by the agency. The score is calculated from your entries for the checklist items.
<b>Major Violation</b>	Identify the number of major violations on the inspection.

For more information about the pages used to set up the inspection evaluation calculations, see the *Implementing Permitting and Licensing* guide.



# 9 Using Oracle Inspector

## Security Details for Using Oracle Inspector

This topic describes important security roles, requirements, or considerations specific to using Oracle Inspector.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Building Inspector	Performs building inspections for permit applications using the Oracle Inspector mobile application. User also needs to be registered in the agency's mobile setup.	PSC Building Inspector PSC Permits Application Administrator PSC System Administrator
PSC Business License Inspector	Performs inspections for business license applications using the Oracle Inspector mobile application. User also needs to be registered in the agency's mobile setup.	PSC Business License Inspector PSC Business License Inspection Supervisor PSC Chief Building Officer
PSC Business License Inspection Supervisor	Manages the workflow and inspectors to get through building inspection jobs for business license applications every day. Keeps track of inspectors, districts, and workload.	PSC Business License Inspection Supervisor
PSC Inspections Supervisor	Manages the workflow and building inspectors to get through building inspection jobs for permit applications every day. Keeps track of inspectors, districts, and workload.	PSC Inspections Supervisor PSC Permits 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](#).

## Overview of Mobile Oracle Inspector

Use the Oracle Inspector mobile app to manage a variety of inspections for permits and business license applications on a daily basis.

Oracle Inspector provides government field staff the ability to enforce regulatory compliance using productivity tools to perform and report on inspections from a mobile device.

Before you begin, you must download the Oracle Inspector application for your mobile device from the iOS App Store for Apple iOS devices or Google Play for Android devices. For information about installing the application and configuring the agency's host URL, see [Installing and Configuring Oracle Inspector](#).

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

## Installing and Configuring Oracle Inspector

You must install and configure the Oracle Inspector to use the mobile inspections application in the field for permit and business license inspections.

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

### Before You Begin

Before you begin installing and configuring the Oracle Inspector mobile application, you must have:

- An agency staff profile

Make sure that you have an agency staff profile to log into the mobile application. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Agency administrators set up the agency staff profiles.

- Appropriate security

Agency administrators must explicitly grant mobile application access to you. You can open the application but need the proper credentials. The only roles that have access to the mobile application are building inspector and inspector supervisor.

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

### Installing Oracle Inspector

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

### Configuring the Oracle Inspector Environment

1. On your mobile device, access the email that you have received from your administrator and click the *Mobile Application Activation* link.

2. Click the **Agree** button on the End User License Agreement page the first time you open Oracle Inspector or when you reinstall the mobile application.  
You must agree to proceed to the next step.
3. The confirmation page appears with the Application Host URL automatically populated. Click the **Get Started** button.
4. Because the application package configuration is secure, you must enter your login credentials before the environment begins to download. Enter your user ID and password.
5. Select the **Save user ID** check box, if desired. The next time you return after logging out, you don't have to reenter your user ID.
6. After your login credentials are successfully authenticated, the setup page appears with a progress bar displaying the progress of the package download.
7. After installation completes, the application home page – Inspection Tasks – appears for the current day.

For more information about inspection tasks in Oracle Inspector, see [Viewing Inspection Tasks](#).

## Resetting the Application Host URL

If you want to reset the application host URL after you've already installed the mobile application and entered the URL in the configuration, you must remove and reinstall the mobile application.

## Viewing Inspection Tasks

Assigned inspections for the day as well as overdue tasks appear in a list on the home page when you open the Oracle Inspector mobile application. From here you can manage and perform inspections.

Inspectors and inspector supervisors can view a list of inspections assigned to themselves on the My Inspections tab or all inspections including those assigned to other inspectors on the All Inspections tab. The calendar provides access to the inspections scheduled for a specific date and includes incomplete inspections from prior days. To access the Inspection Details page and perform the tasks associated with an inspection, click the inspection in the list.

On the Inspection Tasks page, inspectors can:

- View the daily job list for inspections assigned to them on a calendar or map.
- View property address, inspection type, permit type, permit number, and permit status for each permit inspection.
- View business name, business address, inspection type, business license transaction type, and business license transaction number and status for each business license inspection.
- View the inspection status and results for completed inspections.
- View overdue inspections that were incomplete as of the scheduled day.
- Identify inspections with conditions or restrictions.
- Access inspection details and checklists for performing the inspection.
- Search and sort by fields in the displayed inspections.
- Select multiple inspections to provide results.

The Inspection Tasks page, which includes the **My Inspections** and **All Inspections** tabs, provides a daily calendar view with inspections organized by scheduled date and time. Overdue inspections from previous days appear at the top of the list in a collapsible section.

This example on an iPad illustrates an inspector or inspector supervisor's view of the Inspection Tasks home page containing the fields described in the surrounding text. The list of overdue inspections is collapsed. This example shows inspection tasks for permit applications.



< ☰ ORACLE®
Inspection Tasks 📍

My Inspections
All Inspections

<
>

**Tuesday, August 30, 2022** 📅  
6 total tasks



**There are 2 overdue tasks**

☰

✕
⬆️ ⬆️

<b>1:00 AM</b>	<b>4292 Rhode Island Avenue RIA HANNA, US-UT 84031</b> MBL_INSTYPE_2 Description  BENGRRID6 11   In Process	<b>Scheduled</b>  <span style="color: green;">MBLPass</span>
<b>3:00 AM</b>	<b>4292 Rhode Island Avenue RIA HANNA, US-UT 84031</b> MBL_INSTYPE_3 Description  BENGRRID6 9   Withdrawn	<b>Canceled</b>
<b>5:00 AM</b>	<b>4292 Rhode Island Avenue RIA HANNA, US-UT 84031</b> MBL_INSTYPE_4 Description  BENGRRID6 9   Withdrawn	<b>Canceled</b>
<b>4:00 PM</b>	<b>WHITEHALL PL ALAMEDA, US-CA 94501</b> MBL_INSTYPE_1 Description  VKTESTRCFPermit 14   Submitted	<b>Scheduled</b>

You can use the calendar icons to navigate to inspections for a specific date:

Page Element	Description
	Click to open a calendar where you can navigate to a specific date to see the inspections scheduled for the day.
	Click the icons to navigate to the previous day and next day, where you can see the inspections scheduled for the day.

You can also search and sort fields in inspections displayed on the calendar. In the search field, enter alphanumeric text to filter the inspections. Click the **x** to clear the text. Click the sort icon to sort alphanumerically by an inspection field that you select, including Address, City, Inspection Type, Inspector, Inspection Type, Permit Type, Result, Business Name, License Activity, and more.

Each permit inspection in the task list may include this information:

Left Column	Middle Column	Right Column
<p>Time using 12-hour clock</p> <p>AM or PM</p> <p><i>Overdue</i> indicates that the inspection was not completed on the scheduled day.</p>	<p>Summary of Assigned Inspection:</p> <ul style="list-style-type: none"> <li>Property Location</li> <li>Inspection Type</li> <li>Assigned to <i>&lt;Inspector Name&gt;</i> (on All Inspections tab only)</li> <li>Permit Type and Condition icon</li> <li>Permit Number and Status</li> </ul>	<p>Inspection Status - For example, <i>Scheduled, Completed, or Canceled.</i></p> <p>Results for Completed Inspection:</p> <ul style="list-style-type: none"> <li><b>Result</b> - For example, <i>Pass.</i></li> <li><b>Rating</b> - The grade. For example, <i>A.</i></li> <li><b>Score</b> - The overall total score of the inspection. For example, <i>100.</i></li> </ul> <p><b>Note:</b> Values for inspection results are configured by the agency.</p>

Each inspection for a business license application in the task list may include this information:

Left Column	Middle Column	Right Column
<p>Time using 12-hour clock</p> <p>AM or PM</p> <p><i>Overdue</i> indicates that the inspection was not completed on the scheduled day.</p>	<p>Summary of Assigned Inspection:</p> <ul style="list-style-type: none"> <li>Business Name (DBA)</li> <li>Business Location</li> <li>Inspection Type</li> <li>Assigned to <i>&lt;Inspector Name&gt;</i> (on All Inspections tab only)</li> <li>Business License Transaction Type and Condition icon</li> </ul>	<p>Inspection Status - For example, <i>Scheduled, Completed, or Canceled.</i></p> <p>Results for Completed Inspection:</p> <ul style="list-style-type: none"> <li><b>Result</b> - For example, <i>Pass.</i></li> <li><b>Rating</b> - The grade. For example, <i>A.</i></li> <li><b>Score</b> - The overall total score of the inspection. For example, <i>100.</i></li> </ul>

Left Column	Middle Column	Right Column
	<ul style="list-style-type: none"> <li>• Business License Transaction Number and Status</li> <li>• Business License Activity: <i>Origination, Renewal, or Amendment</i></li> </ul>	<p><b>Note:</b> Values for inspection results are configured by the agency.</p>

If there's a condition on the permit or business license application, the icon for the most severe condition is displayed. For example, if three conditions have been applied, including Notice, Hold, and Lock, the Lock icon is displayed. For more information, see [Working with Conditions](#).

You can begin the process of providing results for a group of inspections from a central location by clicking the **Multiple**

**Select** button: 

For information about submitting inspection results for a single inspection through its Inspection Details page, which you access by clicking an inspection on the Inspection Tasks page, or for multiple inspections by selecting multiple inspections on the Inspection Tasks page, see [Submitting Inspection Results](#).

## Claiming Inspections

Inspector supervisors or inspectors can view inspections assigned to other inspectors on the **All Inspections** tab as well as claim a scheduled inspection assigned to another inspector.

If the link is available, you can click **Assign to me** to claim an inspection assigned to another inspector listed on the **All Inspections** tab. The inspector who claims the inspection must have the Building Inspector or Business License Inspector job function with district and inspection type job attributes that match the inspection's district and type attributes. When an inspector claims the inspection, they can also select a new inspection date and time. If the Permit Inspection Rescheduled and Business License Inspection Rescheduled communication events and templates are configured by your agency, the system generates a notification when you reschedule the permit or business license inspection, respectively.

## Working with Overdue Inspections

Permit or business license inspections that are not completed on the scheduled day appear as overdue in a collapsible section at the top of the inspections task list starting the next day. A banner above the task list displays the number of overdue inspections.

Overdue inspections are calculated based on the current date. Any incomplete inspections prior to the current date in the calendar are considered overdue. If you're looking at the task list for the original date the inspection was scheduled, it won't appear as overdue.

Inspectors and supervisors can perform overdue inspections at any time by clicking the task. Completing the inspection moves it back to the scheduled date in the task list, and the date of completion is displayed on the Inspection Detail page.

## Opening the Map View

Use the map icon on the Inspection Tasks page to view the locations of inspections scheduled for the day.

The map view icon looks like this: 

In addition to an interactive map, the map view includes the inspection name, inspection number, property address, and scheduled date and time of the inspection.

You can also view a map of the selected property from the Inspection Detail page.

## Managing Scheduled Inspections

In the Oracle Inspector mobile application, inspector supervisors and building or business license inspectors can add inspections for a permit or business license application as well as update and cancel scheduled inspections while they're in the field.

If you're assigned to an inspection for a permit or business license, you can add a new inspection that's assigned to you and scheduled by you for the same application.

You can manage inspections regardless of the schedule change policy and scheduling cut-off times defined by your agency in the mobile application only.

The mobile application can be online or offline when you add, update, or cancel an inspection. For more information about working offline, see [Performing Offline Mobile Inspections](#).

A few restrictions to adding inspections or providing results may apply:

- Conditions on the application can prevent you from adding an inspection and providing inspection results. They can also prevent you from adding or proceeding with a final inspection.
- Agencies may also only allow inspections to be performed after prerequisite inspections are completed. You'll receive a warning when you add or assign an inspection with prerequisite inspections that haven't passed or been corrected, but you can override the requirement.
- Before scheduling the final inspection, inspectors must complete all other required inspections with a passing or corrected result.

If an inspection type is defined as required in the inspection group, but you turn off the **Required** switch when the inspection is created, then it's no longer considered a required inspection when completing the final inspection.

For more information, see [Working with Conditions](#) and [Setting Up Inspection Groups](#).

## Adding an Inspection in Oracle Inspector

You can use the **Add Inspection** action to create an inspection for an application from any inspection assigned to you. You can't create an inspection if the application is completed, canceled, withdrawn, or denied.

Here's how to add an inspection:

1. Select an inspection in the calendar to open the Inspection Details page.  
The inspection can have a *Scheduled*, *Completed*, or *Canceled* status.
2. Click the three-dot **Actions** menu at the bottom of the page.
3. Click the **Add Inspection** link.  
The Request page opens, displaying the same permit and permit type as for the original inspection.
4. Click the **Show All Inspection Types** check box to view the agency's available inspection types. You can select any inspection type, including those that aren't in the inspection group for the permit type.

5. Select an inspection type from the drop-down list.
6. Turn on the **Pending** switch if this is a placeholder inspection. This switch is only available if set up by your agency. Pending inspections won't show up in Oracle Inspector. You can create a pending inspection even if conditions have been applied to the permit or business license.
7. Click **Continue**.

**Note:** You can't continue if a Prevent Inspection Schedule or Prevent Final Inspection condition has been applied to the permit. In addition, if your agency supports pending inspections, the system prevents you from creating a new or duplicate inspection when an inspection of the same type is already pending. You can schedule the existing pending inspection.

8. Add comments and update other available fields. This is optional.
9. Assign the inspection to yourself by turning on the **Assign to me** switch. When this option isn't active, you are required to be the assigned inspector. The setting is based on the scheduling method your agency sets up for the inspection type.

Your supervisor assigns the inspection using the Inspections console page if you don't assign the inspection to yourself.

The **Assign to me** switch is not available when you turn on the **Pending** switch. In this case, the inspection is neither assigned nor scheduled.

10. Enter values in the date and time fields.

Depending on the scheduling method set up by your agency, you enter either the **Preferred Date** and **Preferred Time** or the **Ready-by Date** and **Ready-by Time**, then your inspection supervisor assigns the inspection in the Inspections console or Inspections page in the application details. You may also see only date fields, depending on the agency-level permit or business license options for inspections using the Ready or Request scheduling methods.

If the **Assign to me** switch isn't available, you are required to be the assigned inspector and you must enter the date and time of the new inspection. When you add a pending inspection, the assignment switch and as well as the date and time fields aren't available.

11. Click **Submit**.

If the inspection is assigned to you, you'll see the new inspection on your Inspection Tasks calendar. Only assigned inspections appear in the mobile application.

When you're working offline, you won't be able to access the inspection details until you're back online, the data is passed to the agency server, and the new inspection number is generated.

For more information about scheduling methods used in mobile inspections, see [Setting Up Inspection Types](#).

## Viewing or Updating an Inspection Schedule in Oracle Inspector

You can update an inspection, regardless of the schedule change policy and scheduled cutoff time. The assigned inspector and inspection supervisor are the only people who can update the inspection schedule without these restrictions. If the inspection has a *Canceled* or *Completed* status, you can still view the schedule details.

Here's how to view or update an inspection schedule:

1. Select an inspection in the calendar to open the Inspection Details page.  
You can only update inspections with a *Scheduled* status.
2. Click the three-dot **Actions** menu.
3. Click the **View Schedule** link.

4. The Inspection page opens, where you can update information such as the inspection location, location contact, contact method, and comments.
5. You can also turn on the **Assign to me** switch to claim another inspector's inspection, if the inspection is eligible to be claimed.
6. Select a new date and time to reschedule the inspection.
7. Click the **Cancel Inspection** button to cancel the inspection permanently.
8. Click **Submit**.

The updated inspection appears on the Inspection Detail page and on the inspection in the calendar.

## Claiming an Inspection

An inspector can claim a scheduled inspection assigned to another inspector when the inspection isn't yet complete and certain criteria are met. The inspector who claims the inspection must have the Building Inspector or Business License Inspector job function with district and inspection type job attributes that match the inspection's district and type attributes.

When an inspector claims the inspection, they can also select a new inspection date and time. If the Permit Inspection Rescheduled and Business License Inspection Rescheduled communication events and templates are configured by your agency, the system generates a notification when you claim or reschedule the permit or business license inspection, respectively.

Here's how to claim an inspection:

1. Select an inspection on the **All Inspections** tab in the Inspection Tasks calendar to open the Inspection Details page.
2. Click the **Assign to me** link next to the assigned inspector's name or in the menu accessed by clicking the three-dot **Actions** button.
3. You can optionally reschedule the inspection by entering a new inspection date and time.
4. Click **OK**.

## Canceling an Inspection in Oracle Inspector

Inspection supervisors and the assigned inspector can cancel inspections with a *Scheduled* status. When you cancel an inspection, you can't restore it; the cancellation is permanent. However, you can add a new inspection for the same application or view the inspection schedule details for the canceled inspection.

Here's how to cancel an inspection.

1. Select an inspection in the Inspection Tasks calendar to open the Inspection Details page.
2. Click the three-dot **Actions** menu.
3. Click the **Cancel Inspection** link.

You can also cancel the inspection by clicking the **View Schedule** link then clicking the **Cancel Inspection** button on the Inspection page.

4. On the Cancel Inspection page, enter a cancellation reason. Your agency may require comments, depending on settings in the agency options.
5. Click **Continue**.

The canceled status and any comments entered appear on the Inspection Detail page. The status also appears on the inspection in the calendar.



## Working with Inspection Details

In the Oracle Inspector mobile application, you view inspection details and initiate actions for performing inspections on the Inspection Detail page. You can also view and update inspection scheduling information, cancel the inspection, or add a new one.


Access the Inspection Detail page by selecting an inspection from the list on the Inspection Tasks page. On the detail page, you can:

- Review the inspection number, type, and its status.
- Locate the inspection site on a map.
- Access application details associated with the inspection.
- Review the description of the application.
- Identify the inspector and location contact.
- Locate the inspection site on a map.
- Review inspection status, rating, score, and number of major violations of completed inspections.
- Identify the inspector, location contact, and contact information.
- Read requester comments and special location instructions.
- Claim an inspection assigned to another inspector.
- Access the conditions applied to the application.
- View and manage attachments for the inspection.
- Update your estimated time of arrival at the property.
- View and update, add, or cancel an inspection.
- View the cancellation reason for canceled inspections.
- View the inspection summary report for completed inspections.

This example illustrates the Inspection Detail page for a permit inspection containing the field values described in the surrounding text. The Inspection Detail page for a business license application also displays the Doing Business As (DBA) business name and the license activity (Origination, Amendment, or Renewal). Time recording isn't available for business license inspections.

  Inspection Detail

BLDG-INSP-2022-00065 **Scheduled**  
107 Driveway

 1011 Lincoln Avenue  
ALAMEDA, California 94501

Created manually by Martha Paxton on 8/24/22

---

[RESADD-2022-00033](#) | Submitted  
Residential Addition

Wednesday, August 24, 2022, 12:00 PM  
1:00 PM - 5:00 PM  
ETA *Not set*

.....

Assess Fee : No


---

Inspector **Tim Sandor**  
[Assign to me](#)


---

Location Contact **Anne Lewis**  
Email [anne.lewis@oracle.com](mailto:anne.lewis@oracle.com)


---

 **Conditions**


---

 **Attachments**


---

 **Comments**

---


 **Time Recording**


---

 **Result** **Submit**



You can view this information and perform these actions on the Inspection Detail page:

Page Element	Description
Inspection information section	View the inspection number, type, and status, such as Scheduled, Canceled, and Completed.
	Click the map icon to view the location of the property on a map.
Property or business information section	<p>Review the following information:</p> <ul style="list-style-type: none"> <li>• The business name or DBA (doing business as), if this is a business license inspection.</li> <li>• Address of the inspection next to the map icon, along with any additional detail about the location.</li> <li>• The method of scheduling such as Interactive Voice Response (IVR), manual, automatic, online (from a public user), data migration, or upgrade.</li> <li>• The name of the person who created the inspection and the date.</li> </ul> <p><b>Note:</b> If the inspection is scheduled automatically or using IVR, no name is displayed.</p>
Application information section	<p>Review the status of the application.</p> <ul style="list-style-type: none"> <li>• Application number. Click the link to access the application.</li> <li>• Application status</li> <li>• Application type</li> <li>• Application description</li> <li>• Condition indicator</li> </ul> <p>If one or more conditions have been applied, you'll see an icon for the most severe condition and a link to access more condition information.</p> <ul style="list-style-type: none"> <li>• Activity type for business license applications: Origination, Renewal, or Amendment</li> </ul>
Inspection schedule information section	<p>Review the following information:</p> <ul style="list-style-type: none"> <li>• Schedule of the inspection, including the expected time of arrival (ETA) that you selected using the <b>Update ETA</b> action. If the inspection results have been submitted, then the result is displayed.</li> <li>• Cancellation date and reason, if the inspection was canceled and comments were added. Comments may be optional depending on the agency setup.</li> <li>• <b>Assess Fee</b> – The Yes or No value is determined by the details selected by the inspector on the Result Inspection page. This option is displayed only if your agency has set up the inspection type to display the field.</li> </ul>
Contact information section	<p>Review the contacts, including the assigned inspector, the location contact, phone number, and email address or text message. Also view any comments added by the requester during the inspection scheduling.</p> <p>The <b>Assign to me</b> link is available to claim another inspector's inspection if the inspection is scheduled and the inspector who claims the inspection has the Building Inspector or Business License Inspector job function with district and inspection type attributes that match the inspection's district and type attributes..</p>

Page Element	Description
<p><b>Checklists</b></p>	<p>View the number of checklists to complete for the inspection.</p> <p>Click to open the Inspection Checklist page. From here you have access to the inspection checklist items.</p> <p><b>Note:</b> You can't work with checklists if there's a condition on the application that prevents the final inspection or prevents inspection results.</p>
<p><b>Conditions</b></p>	<p>View the number of conditions applied to the application.</p> <p>Click the link to open the Conditions page, where you can view the summary of the conditions applied to the application.</p> <p>For more information about conditions on applications, see <a href="#">Applying Conditions to Applications</a>.</p>
<p><b>Attachments</b></p>	<p>View the number of documents attached to the inspection.</p> <p>Click to open the Attachments page, where you can review or upload attachments or documents related to the inspection, such as videos or annotated photos. The maximum file size you can upload in the mobile app is 25 MB.</p> <p>On the Attachments page, you can also search for, filter, and sort attachments and select which inspection attachments you want to view. You can view all attachments, inspection-level attachments, checklist attachments, or checklist item attachments.</p>
<p><b>Comments</b></p>	<p>Click to open the Comments page. Review or add comments related to the inspection.</p> <p>Inspector comments are visible to the public unless the agency selects an option to hide them.</p> <p>Go to the Inspection Checklist and Checklist Items pages to view the comments made for checklists and checklist items.</p>
<p><b>Time Reporting</b></p>	<p>Available for permit inspections only. Click to open the Time Reporting page, where you can view and filter time entries associated with the inspection. From here, you can add entries to record the amount of time you spend on various activities. For more information, see <a href="#">Reporting Inspection Time</a>.</p>
	<p>Click the three-dot <b>Actions</b> icon at the bottom of the page to perform these actions:</p> <ul style="list-style-type: none"> <li>• <b>Update ETA</b> – Add your estimated time of arrival at the property using the Estimated Time of Arrival page. You can use the <b>Delete</b> button to delete the previously entered values.</li> </ul> <p>Your agency can set up automatically generated notifications when an ETA is updated using the Permit Inspection ETA Updated or Business License Inspection ETA Updated communication events and templates.</p> <ul style="list-style-type: none"> <li>• <b>View Schedule</b> – View the inspection schedule details for an inspection in any status. You can update the inspection time and date as well as other fields when the inspection has a <i>Scheduled</i> status.</li> <li>• <b>Assign to me</b> – Claim a scheduled inspection assigned to another inspector, if the inspection is qualified.</li> <li>• <b>Cancel Inspection</b> – Cancel an inspection with a <i>Scheduled</i> status.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>• <b>Add Inspection</b> – Add an inspection for the same application. This action is available on inspections with a <i>Scheduled</i> or <i>Canceled</i> status. When the application status is <i>Withdrawn</i> or <i>Completed</i>, you will no longer be able to add new inspections.</li> <li>• <b>View Summary Report</b> – View the inspection summary report. This action is available on completed inspections.</li> </ul> <p>For more information about the <b>View Schedule</b>, <b>Assign to me</b>, <b>Cancel Inspection</b>, and <b>Add Inspection</b> actions, see <i>Managing Scheduled Inspections</i>.</p>
<b>Result</b>	<p>Click this button to open the Inspection Result page, where you can view the overall inspection results. You can also add comments, attachments, and required signatures before submitting the results.</p> <p>Before you can provide results for a final inspection, you must complete all other required inspections with a passing or corrected result.</p> <p>Turn on the <b>Assess Fee</b> switch to charge a fee for the inspection. For more information about assessing fees, see <i>Submitting Inspection Results</i>.</p> <p><b>Note:</b> This button isn't active if the checklist results are not completed or if there's a condition on the application that prevents the final inspection or prevents inspection results.</p>
<b>Submit</b>	<p>Click this button to submit the result, which changes the inspection status to completed. This button is available after the results have been provided.</p> <p>After an inspection is submitted, you can select the <b>View Summary Report</b> link in the <b>Action</b> menu on the Inspection Detail page.</p>

## Viewing the Mobile Summary for an Application

You view an application summary in the Oracle Inspector mobile app on the Overview page, where you get a snapshot of information regarding a permit or business license application with links to more detail.

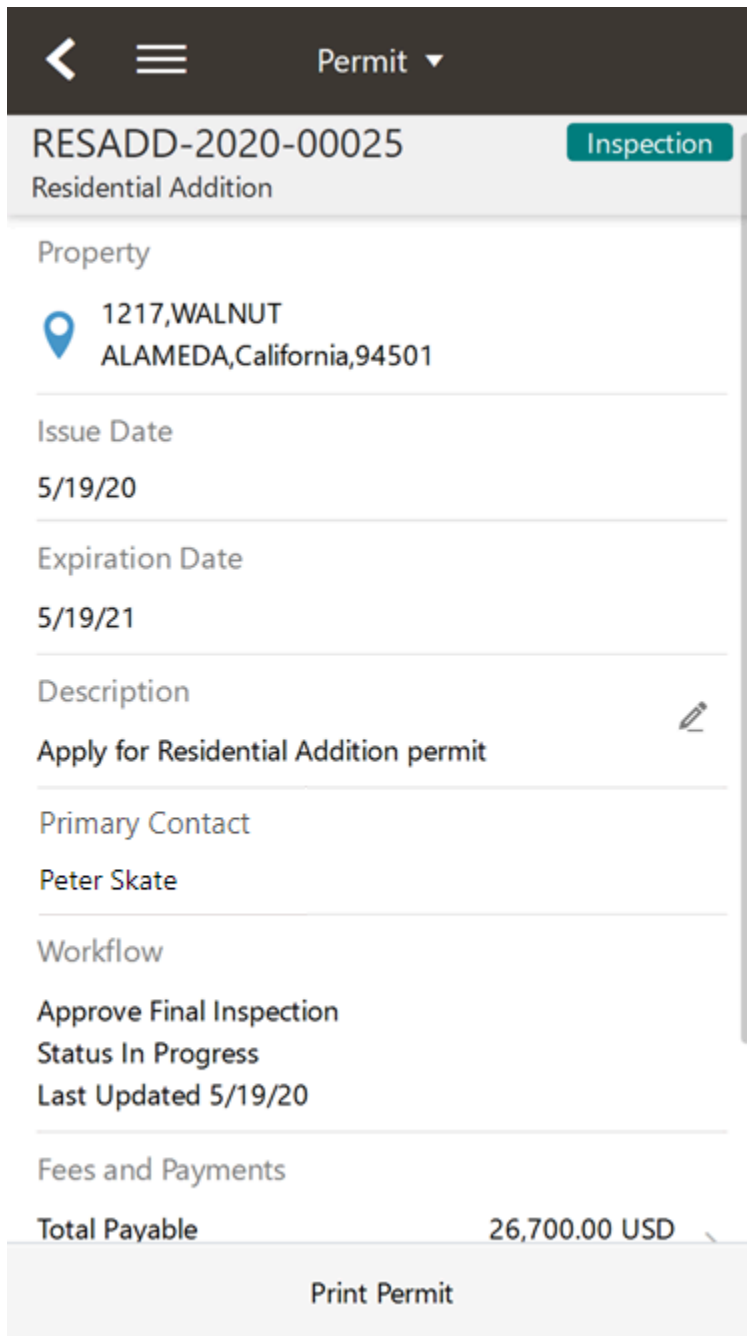
For more information about the Overview page and its functionality on a laptop or desktop computer, see *Viewing the Permit Summary*.

To open the Overview page in the inspection app, click the permit number link under the inspection type on the Inspection Detail page. When you access the Overview page through the mobile app, you can:

- Review a summary of property, applicant, workflow, and inspection information.
- View a description of the permit.
- Print the building permit.
- Access project and fee details.

If the permit application is associated with a project or there are fees and payments, you can click the information that is displayed on the Overview page to access details. You can also access project and fee details by using the navigation menu located on the page title.

This example illustrates the Permit Overview page in the Oracle Inspector.



## Viewing the Mobile Business License Activity Summary

You can view a summary of the business license activity associated with an inspection in the Oracle Inspector mobile app to get a snapshot of information regarding the application with links to more detail.

For more information about the summary page and its functionality on a laptop or desktop computer, see [Viewing a Summary of Business License Activity](#).

To open the summary page in the inspection mobile app, click the business license application number link under the inspection type on the Inspection Detail page. When you access the summary page through the mobile app, you can view information such as:

- Business information
- Assigned specialist
- Date the application was received
- Activity description
- Primary contact for the application
- Application workflow information
- Summary of fees and payments

This example illustrates the Business License activity summary page for an origination application.


Business License ▾

**BusLic-DEC2022-0195** Submitted



Restaurant Business License  
Origination

---

Business Information

 Vapour Brewery


---

Specialist  

Sean Patrick

---

Received Date \*

12/8/22 

---

Description

Restaurant Business License

---

Primary Contact

Ben Glauner

---

Workflow

Status

Last Updated

---

Fees and Payments

Total Payable	4.00 USD	>
Total Paid	4.00 USD	
Balance Due	0.00 USD	

## Working with Conditions

You can view, apply, and resolve conditions on permits and business licenses in the Oracle Inspector mobile application on the Conditions page.

When you access the Conditions page by clicking the **Conditions** button on the Inspection Details page in the mobile application, you can:

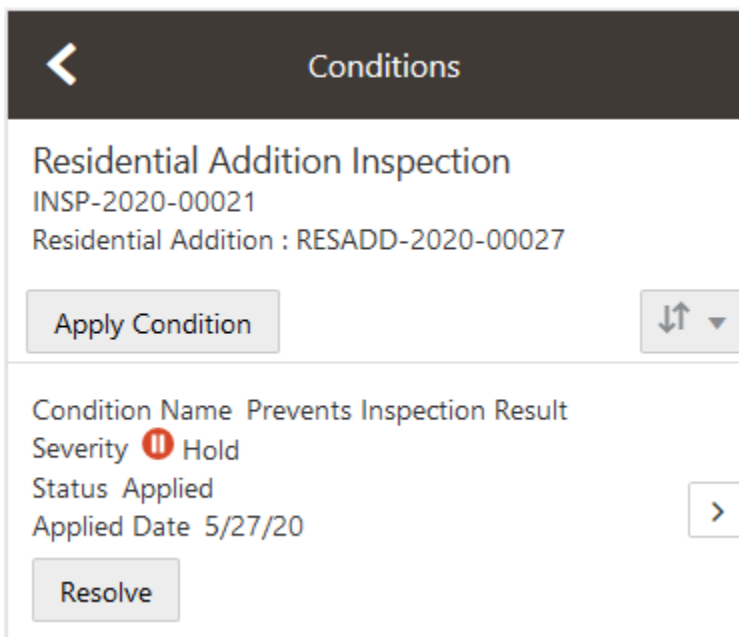
- Review existing conditions.
- Review condition details.
- Resolve existing conditions.
- Apply new conditions.

Conditions on the permit or business license can prevent you from scheduling an inspection and providing inspection results. They can also prevent you from adding or proceeding with a final inspection.


If conditions have been applied to a permit or business license, an icon appears on various pages to indicate the type of condition, such as lock, hold, or notice. If there are multiple conditions applied to the permit or business license, the most severe condition is displayed. You can see which conditions have been applied in the condition details.

For more information about conditions, see [Applying Conditions to Applications](#).

This example illustrates the Conditions page for a permit, containing the field values described in the surrounding text.



Page Element	Description
Apply Condition	Click this button to add a new restriction to the application. See <a href="#">Applying Conditions to Applications</a> .

Page Element	Description
<b>Resolve</b>	Click this button to resolve the restriction that was applied to the application.
	Click the detail icon next to the condition in the list to access condition details. You can resolve the condition on the details page.

## Types of Inspection Conditions

Three types of conditions apply specifically to permit and business license application inspections:

- *Prevent Inspection Schedule*
- *Prevent Inspection Result*
- *Prevent Final Inspection*

Agency staff applies the *Prevent Inspection Schedule* condition to prevent the inspector from adding an inspection.

When agency staff applies the *Prevent Inspection Result* condition, the inspector can't click the **Result** button on the Inspection Detail page to finalize the results of any type of inspection. You also can't work with the checklist.

When agency staff applies the *Prevent Final Inspection* condition, the inspector can't add an inspection, provide results for items in the checklist, or click the **Result** button on the Inspection Detail page to finalize the results. The condition can be applied at any point in the application process except on complete or canceled applications.

You can, however, add a pending or placeholder final inspection if the agency has enabled pending inspections for permits or business licenses. To add a pending final inspection, you turn on the **Pending** switch on the Inspection request page when adding the inspection. The condition prevents inspection supervisors from assigning or scheduling the inspection until the condition is resolved.

## Reporting Inspection Time

You can record the time that you spend working on inspections for the purposes of billing and reporting on the Time Reporting pages in the Oracle Inspector mobile application.

Access the Time Reporting pages by clicking the **Time Reporting** button on the Inspection Detail page. Here you can:

- View and sort time entries for an inspection.
- View time entry details, including the job title bill rate.
- Enter time for an activity.
- Delete time entries.

When you add a time entry on the Time Details page, you record the duration of the activity, whether the time is billable, and comments. You can override the job title bill rate, if you have time recording management permissions.

For more information about time reporting, see [Adding Time Entries](#).



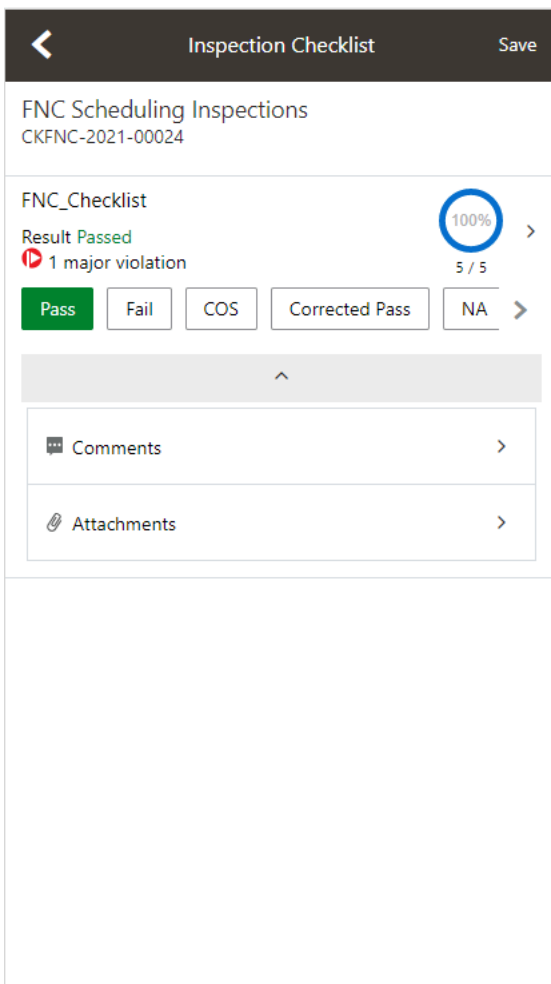
## Using Inspection Checklists

An inspection can have one or more checklists that cover the scope of the codes and requirements. Depending on the permit or business license application requirements, an inspection may have checklists with one or more checklist items, or none at all. You work through the checklists and provide inspection results on the checklist pages in the Oracle Inspector mobile application.

To access the checklists, click the **Checklist** button on the Inspection Detail page. When you're performing an inspection, you can do the following at the checklist level:

- View results progress, if the inspection has checklist items.
- Access checklist items.
- Provide a result for the checklist.
- Review or add checklist attachments.
- Review or add checklist comments.

This example illustrates the Inspection Checklist page containing the field values described in the following table.



**Note:** You must complete the inspection checklists and checklist items before you can submit the result for the overall inspection.

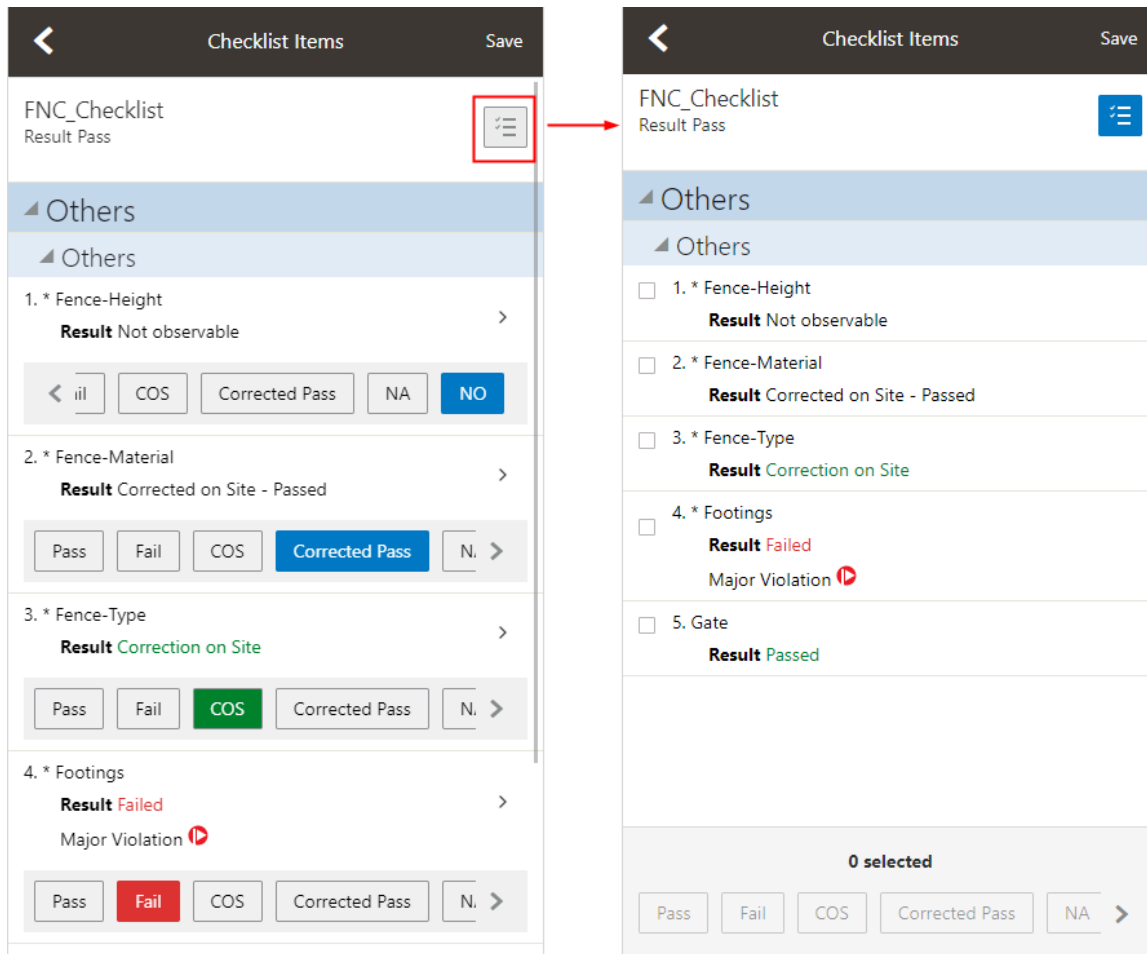
Page Elements	Description
<b>Checklist</b>	Click the checklist row to open the Checklist Items page.
<b>Result</b>	<p>Results are defined by the agency. Common results are Pass, Fail, Corrected on Site (COS), Not Applicable (NA), and Not Observed (NO).</p> <p>If the inspection was set up by the agency to use scoring, the system automatically populates the result based on the scoring method. If scoring is not used, the inspector must manually add the result.</p> <p><b>CAUTION:</b> You can't update the inspection result on the checklist items, checklists, and inspection when a condition to prevent the inspection result has been applied. You must resolve the issue first and when necessary, reschedule the inspection. Before you can update the inspection result on a final inspection all of the required inspections for the permit must be complete with a passing or completed result.</p>
Progress indicator	Displays percentage in a progress ring and count how many of the checklist items have been evaluated.
<b>Comments</b>	Click to open the Comments page for the checklist level. Review or add comments related to the checklist.
<b>Attachments</b>	<p>View the number of documents attached to the inspection.</p> <p>Click to open the Checklist Attachment page, where you can review or upload attachments or documents related to the inspection checklist, such as videos or annotated photos. The maximum file size you can upload in the mobile app is 25 MB.</p> <p>Here you can search for, filter, and sort attachments and select which inspection attachments you want to view. You can also view all attachments, inspection-level attachments, checklist attachments, or checklist item attachments.</p>

## Working with Checklist Items

To drill down to checklist items, select a checklist on the Inspection Checklist page. On the Checklist Items page, you can:

- View a list of checklist items.
- Enter a result for each checklist item.
- Click a checklist item to access the Checklist Item Results page.

This example illustrates the Checklist Items page.



Select a result for each checklist item. When you choose a failing result for a checklist item, the Checklist Item Result page opens so that you can add comments and attachments as support documents for the failing result. For information about comments and attachments, see the information about comments and attachments at the inspection and checklist levels.

You can also select a result for multiple checklist items by using the **Edit** button. In this case you must assign the same result to all of the selected items.

Click the checklist item row to open the Checklist Item Result page.

On the Checklist Item Result page, you can:

- Review or add checklist item attachments.

**Note:** The maximum file size you can upload in the mobile app is 25 MB.

- Review or add checklist item comments.
- Scroll through the item results.

This example illustrates the Checklist Item Result page described in the surrounding text.

Checklist Item Result Save

< Previous 1 / 5 Next >

FNC\_Checklist  
Others - Others

1. Fence-Height

\* Result

< Fail COS Corrected Pass **NA** NO

Comments (0) Attachments

There are no comments entered.

Add Comment

## Submitting Inspection Results

You can submit inspection results to complete assigned inspections one at a time through the inspection's detail pages or submit multiple inspections at once by selecting inspections on the Oracle Inspector mobile app home page.

Whether you complete an individual inspection by accessing the Inspection Result page from the inspection's detail page or you provide results for one or more inspections that you selected on the Inspection Tasks page, the information needed to complete the inspections before you submit the results is the same. Here's how to complete your inspections:

- Review calculated inspection results or provide an overall inspection result.
- Indicate whether a fee should be assessed for the inspection or inspections.
- Capture the inspector, contractor, and property owner signatures.
- Add inspection comments and support documents as attachments.
- Submit the inspection or inspections.

**Note:** Inspectors can't submit a completed inspection if required comments or signatures are missing. You must also complete all checklists and resolve any application conditions that affect the inspection.

Your agency determines whether comments are required in the agency-level permit and business license options during the implementation of Oracle Permitting and Licensing. Comments can be optional, required for all results and cancellations, or required for failed results and cancellations.

Your agency decides which signatures are required for each inspection type.

Your agency can also configure the system to send out notifications when an inspection is complete or the final inspection has passed. For more information, see "Sending Notifications" in this topic.

## Completing an Inspection in the Inspection Details

Here's how to complete an inspection by providing information on the inspection's Inspection Detail page:

1. On the Inspection Tasks page, click inspection you would like to complete.
2. Click the **Result** button on the Inspection Detail page.

Before you can provide the overall inspection result, you must provide results for the checklists and resolve conditions on the application.

3. Enter the information required to submit the inspection on the Inspection Result page.

This example on a phone illustrates the Inspection Result page, which is described in the table that follows. The inspection results are complete with the required signature, but not submitted. The option to assess a fee is active.

Inspection Result Save

Electrical Inspection  
INSP-2021-00003


Result **Pass**  
Score 100

Assess Fee

Comments >

Attachments >

**Provide Signature Below**

\* **Inspector:** Martha Paxton  
Signed on: 2/18/21 3:41 PM  >

**Contractor:** >

**Owner:** >

Submit

### Elements on the Inspection Result page

Page Element	Description
<b>Result</b>	Depending on the method used to calculate the results, the system may automatically calculate the final result based on checklist results or you can select a passing or failing result.
<b>Assess Fee</b>	Turn on the <b>Assess Fee</b> switch to indicate that a fee should be assessed. If fee assessment is configured by your agency and this switch is turned on, the system calculates the fee and charges it back to the applicant when you submit the inspection. For more information, see the "Assessing Fees" section in this topic.
<b>Comments</b>	Click to add comments.
<b>Attachments</b>	Click to add attachments.
Signatures section	Click the row for <b>Inspector</b> , <b>Contractor</b> , or <b>Property Owner</b> to access the field for adding a signature. Click <b>Save</b> to submit the signature. You must also add the names of contractors and property owners when they add their signatures.

4. Click **Submit**.

**Note:** You can't submit a completed inspection if required comments or signatures are missing.

## Completing Multiple Inspection Tasks

Inspectors and inspector supervisors can provide results for multiple inspections from a central location in the Oracle Inspector mobile application without first navigating to the inspection details page then to the Inspection Result page for each inspection.

Here's how to provide results for multiple inspections:

1.



On the Inspection Tasks page, click the **Multiple Select** button:

2. Select the check boxes for the inspections that you want to provide results for.

You can only provide results for inspections that are assigned to you or you have the appropriate permissions. The inspections must also meet the requirements listed here:

- o The inspection status isn't completed or canceled.
- o The inspection checklists already have results, if they have checklists.
- o The applications don't have conditions like Prevent Inspection Result or Prevent Final Inspection applied to them.
- o Prerequisite inspections, if any, are already complete with passing or corrected results.
- o For final inspections, all other required inspections are complete with passing or corrected results.

If an inspection doesn't meet all of these requirements, you can't select it. The number of selected inspections is displayed.

3. Click **Result Inspections**.



4. View the inspections you've selected on the Result Inspections page. Here you have a choice:
  - a. You can complete the result for each inspection on the Result Inspections page directly without going into each individual inspection. In this case, you can provide a different result for each inspection. You can also provide comments, attachments, and signatures, and turn on the assess fee option.
  - b. You can apply the same result, inspector signature, and assess fee option to all of the selected inspections at one time by clicking **Result All**. However, the result you select here will not override the system-calculated result for inspections using the scoring method.

This example illustrates the Result All modal page where you select the results that you want to apply to all of the selected inspections. The example shows inspections for a permit.

Tuesday, August 9, 2022

### Result Inspections

Total inspections: 2

**8/8/22** Overdue

Inspection  
MBL\_INSTYPE\_3 Description  
MBL-220808-00005

Address  
4292 Rhode Island Av  
HANNA, US-UT 84031

Permit  
MIPTYPE  
ZPER-FEN-2022-00001

Result MBLPass Description  
Score 60  
Rating D  
Major Violation 1

Assess Fee

**4:00 PM**

Inspection  
PLU Inspection Requesting Inspections  
CKPLU-2022-00001

Address  
4292 Rhode Island Avenue RIA, Rhode Island Avenue  
HANNA, US-UT 84031

Permit  
MIPTYPE  
ZPER-FEN-2022-00001

Assess Fee

**Result All**  
2 Inspections

Provide the result for all inspections




Assess Fee

Provide your signature for all inspections

Provide signatures to acknowledge the inspection results.

This table describes the elements on the Result Inspections page and on the Result All modal page that appears when you click **Result All**.

**Elements on the Result Inspections page and Result All modal page**

Page Element	Description
Result	<p>Depending on the method used to calculate the results, the system may automatically calculate the final result based on checklist results or you can select a passing or failing result.</p> <p>On the Result All modal page, you can select a passing or failing result that is applied to all of the inspections on the Result Inspections page. This option overwrites any existing results that have been calculated, but will not override the system-calculated result for inspections using the scoring method.</p>
Assess Fee	<p>Turn on the <b>Assess Fee</b> switch to indicate that a fee should be assessed. If fee assessment is configured by your agency, the system calculates the fee and charges it back to the applicant when you submit the inspection. For more information, see the "Assessing Fees" section in this topic.</p> <p>The switch on the Result All modal page applies fee assessment to all of the inspections on the Result Inspections page.</p>
	<p>Click the <b>Add Signatures</b> icon on the Result Inspections page to enter <b>Inspector, Contractor, or Property Owner</b> signatures. You must also add the names of contractors and property owners when they add their signatures. Click <b>Show Signatures</b>, which is the same icon displayed with a dot under it, to show the added signatures.</p> <p>You can provide only the inspector signature for all inspections on the Result Inspections page using the Result All modal page.</p>
	<p>Click the Add Comments icon to enter comments. Click the same icon with a dot under it to show the added comments. You can't add comments on the Result All modal page.</p>
	<p>Click to add attachments. Click the same icon with a dot under it to show the added attachments. You can't add attachments on the Result All modal page.</p>

- Click **Submit**. You must submit the results and inspection information that you provided on the Result Inspections page or Result All modal page to complete the inspection.

**Note:** You can't submit completed inspections if required comments or signatures are missing.

## Assessing Fees

Your agency may enable you to indicate that a fee should be assessed based on the inspection results for a specific inspection type. If fee assessment is configured by your agency and you turn on the **Assess Fee** switch, the system

calculates the fee and charges it back to the applicant when you submit the inspection. For example, if you fail a plumbing inspection and a reinspection is required, you may want a fee to be assessed for that inspection. Your agency must set up the inspection type and Business Rules Framework to assess fees. For more information, see *Setting Up Inspection Types* and *Setting Up Add Fee Actions*.

Fee assessment indicators appear on the Inspection Detail page in the mobile application and on the Inspection Detail page in the application details on a desktop.

## Sending Notifications

Your agency can configure communications for inspection events to send notifications. Here are a few of the available events:

- Permit Inspection Complete or Business License Inspection Complete
- Permit Final Inspection Passed or Business License Final Inspection Passed

The inspections communication resources and events are also registered with the Business Rules Framework. For more information about the events available to be configured for sending notifications for permit and business license application inspections, see *Delivered Communication Events*.

The communication templates in the configuration determine who receives the notification, such as the inspector, agency staff, the applicant, or contacts with application access.

The Inspection Complete events generate a notification when the inspector completes an inspection and submits the inspection results or when inspections are updated from Scheduled to Completed status. The template for these events can include a variety of information, including an overview of the inspection status change and the result of the inspection, whether it passed or failed.

The Final Inspection Passed events generate a notification when you submit the final inspection for a permit or business license application with a passing result. The notification may go to the permit technician or other agency staff, applicant, or contacts with application access, depending on the communication template setup.

Your agency determines whether the notifications are sent by email or online notification when the user logs into the Oracle Permitting and Licensing service.

## Performing Offline Mobile Inspections





The mobile inspection application automatically connects to your agency's servers when a network is available, but you can also perform mobile inspections using offline functionality in locations where you don't have access to the agency's servers.

When you don't have Internet access while using Oracle Inspector, you still can perform many of your inspection-related tasks. When the Internet connection is restored, your data is automatically synchronized with the permit and business license applications in your agency's system.

The mobile service for Oracle Inspector downloads data to your mobile device for use offline. When your Internet connection is restored, the mobile service sends data about all the performed actions to your agency's Permitting and Licensing Cloud and updates the data in the server. The actions performed offline are transferred, and the changes you made in the offline mode are updated with the changes in the application. This way, data in your mobile device browser is synchronized with the permit and business license applications data.

Notifications in the application let you know the offline status of Oracle Inspector.

You may see these icons displayed in the global header when the offline mode is enabled.

Icon	Description
	Download in Progress
	Download Error
	Synchronization in Progress
	Synchronization Error

## Turn On the Offline Mode

Your agency determines whether you can work offline. If your agency supports offline mode, you can turn it on or off in the mobile application:

1. Go to **Navigator > Offline Settings**.
2. Turn on the **Online Mode** switch to download and store inspections for use when an internet connection is lost.

## Data Is Downloaded to Your Device

When you log in for the first time each day, your inspection data is refreshed on your device. Your inspections for the day including overdue inspections are downloaded and cached on your device, as well as partial data for inspections not assigned to you and future inspections.

The Download in Progress icon notifies you when the mobile service is downloading the data from the agency's server to your mobile device. You must wait for the icon to disappear, indicating the download is complete, before performing actions. Keep the application in the foreground while downloading data to ensure all of the data is downloaded. Don't minimize the application or open another application while data is downloading.

**Note:** The first time that Oracle Inspector syncs for the day with your agency's data for working offline may take several minutes. The length of time depends on the amount of data to download and cache, such as number of scheduled and overdue inspections and final attachments. Subsequently the sync process goes more quickly.

If there's an interruption in network connectivity, the mobile service automatically restarts downloading the data when the network is available again until the download is complete.

If offline mode is enabled, cached data is refreshed daily. To manually refresh your data, go to **Navigator > Refresh Data**.

## Perform Inspections While You're Offline

You can view, create, and edit inspection records in the offline mode, and then the mobile service will sync them once the network connection is restored. This includes comments, supporting documents, and required signatures.

If you're working offline and try to access inspections before or after today, you'll see partial information. You'll see the inspection details, permit overview or business license activity summary, and application conditions but not the checklist, checklist items, comments, attachments, and time recording.

If you can't add results, check with your administrator to see if your agency is using a different scoring method. You can also view the permit or business license application record and details when you're online to see if a condition has been placed on the application. Once any issues are resolved and all of the required results and signatures are complete, you can submit the inspection. All of the actions you perform are sent to the agency's server when you're back online.

**Note:** Any features that need to interact with online data, or interact with other applications, are not available offline. These include maps and reports.

## Offline Updates Are Saved

When you are working offline, you can see all of the data that was saved onto the device while you were online. The changes you make are synchronized to the server when you're back online.

When the application is in offline mode, you can't view any updates that were made by other inspectors or the agency to the inspection data since the application changed to offline mode, because of the absence of a network connection. You can view those data updates only after refreshing the data that is cached.

## Offline Data Is Synchronized

Your data synchronizes automatically every 5 minutes when the device detects a network connection and goes online. You'll see the Synchronization in Progress icon during the sync process.

**CAUTION:** If you disable the offline mode after performing actions and before synchronizing with the agency's servers, you'll lose the work you did offline. Wait until synchronization is complete before disabling the offline mode. Check with your system administrator if you receive persistent errors.

## Resolve Synchronization Errors

If there are problems synchronizing the data, the Synchronization Errors icon appears. Tap the icon to view the Sync Errors page. You can also find a list of inspections that have synchronization issues on the **Offline Sync Status** page, which you can access through the mobile application **Navigator** menu.

Either you or the inspections supervisor can then use a desktop or laptop to go to **Navigator > Offline Sync Management** to access the Offline Inspection: Conflict and Error Management page to troubleshoot errors for a particular inspection. The error description indicates the problem, which you can fix while online on your desktop or laptop.

For example, you may need to resolve a condition placed on an application while you were offline, causing a synchronization error. After you've fixed the problem, you can manually synchronize with your mobile device and refresh the data from the error management page.

If you are online and the synchronization is causing errors, you can disable the offline mode on your mobile device on the **Offline Settings** page found in the mobile application **Navigator** menu, and continue to work online. You'll lose any new work you performed if you disable the offline mode while offline. Check with your system administrator if you receive persistent errors.

## Enable Logging

If you are experiencing issues with offline inspections, your agency's help desk may request that you submit a log file with your help ticket. The log files will provide information to aid the help desk in identifying and troubleshooting any potential issues with the offline processing. Here's how to turn on logging:

1. Go to **Navigator > Offline Settings**.
2. Turn on the **Enable Logging** switch.

Check the **Log Files** grid on the page for the generated log files, which you can view and download to send to your help desk.





# 10 Working with Business License Expiration

## Expiration Overview

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

### Expiration Rules

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

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

### Business License Expiration Dates

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

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

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

### Business License Consultation Expiration Dates

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

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

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

## Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.

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

- When the application expires.

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

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

- When the permit expires.

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

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

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

## Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.

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

- When the entitlement expires.

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

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

## Pre-Application Expiration Dates

Expiration rules for 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](#).

## Viewing Business License Expiration

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

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

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

## Viewing the Activity Expiration Dates

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

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

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

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

## Viewing the License Expiration Dates

To view the expiration dates for issued business licenses:

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

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

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

## Updating Application Expiration Status

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

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

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

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

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

## Entering Parameters to Process Expiration Rules

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

## Scheduling the Process

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

Page Element	Description
<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> </ul> <p><b>Note:</b> <i>Daily</i> is the recommended option for running the expiration status update process.</p> <ul style="list-style-type: none"> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> 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>	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.

Page Element	Description
	<p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<p><b>Repeat – 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>Repeat – By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> 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.





# 11 Managing the Business License

## Overview of Business Licenses

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

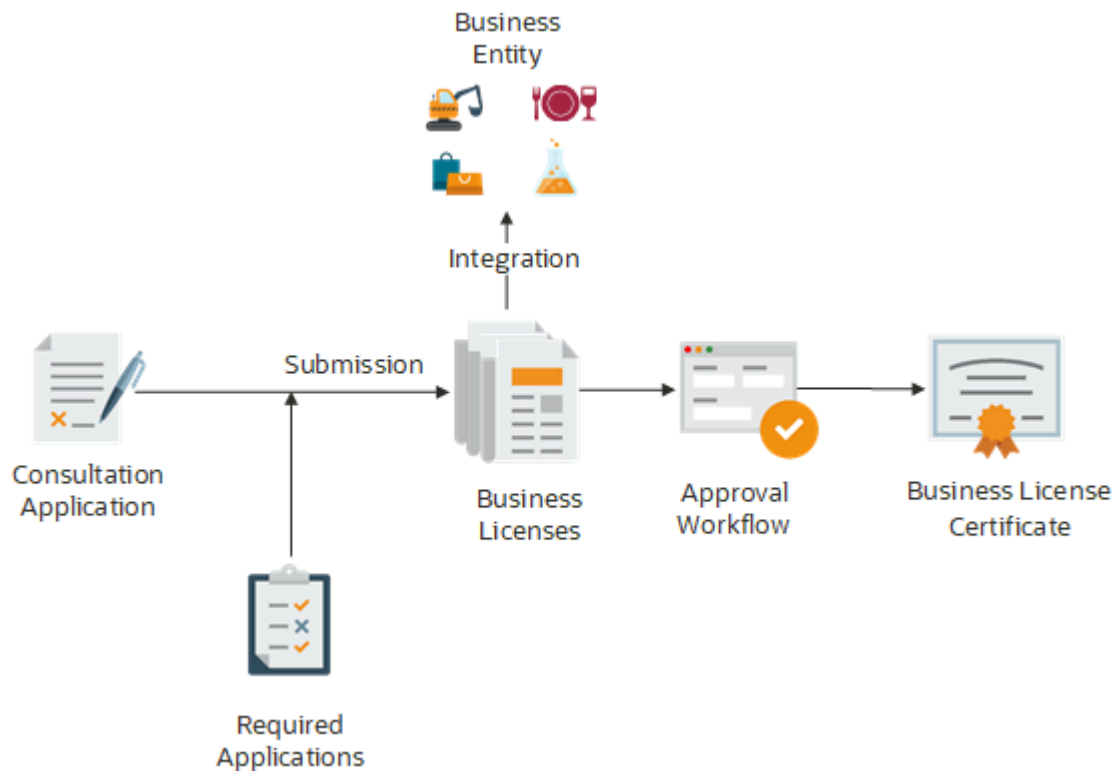
### Business Licensing Flow

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

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

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

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



## Security Details for Managing Business Licenses

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Business License Inquiry	Allows agency users to view business licenses	PSC Agency Staff
PSC Business License Application Administrator	Configures and administers the business licenses offering.	PSC System Administrator PSC Custom Business License Business Analyst PSC Custom Business License Application Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Confidential Business Licenses Data	Allows users to access confidential information in business licenses data.	PSC Auditor PSC Business Analyst PSC Business License Application Administrator PSC Business License Manager PSC Business License Specialist PSC System Administrator PSC Treasury Administrator PSC Treasury Supervisor PSC Permits Application Administrator PSC Planning and Zoning Application Administrator
PSC Business License Manager	<ul style="list-style-type: none"> <li>• Administers the business licensing program.</li> <li>• Prepares annual business license bills.</li> <li>• Prints and mails licensing bills for registered businesses, responds to inquiries from business owners and the general public, researches and resolves problem situations.</li> <li>• Administers and enforces the provisions of the Alcohol Beverage Ordinance.</li> <li>• Acts as a liaison between departments regarding privileged license information.</li> </ul>	
PSC Business License Specialist	<ul style="list-style-type: none"> <li>• Assists the public with general information as well as in completing required licensing forms.</li> <li>• Provides information to the public pertaining to licensing of businesses.</li> <li>• Creates and maintains information sheets and other documentation for distribution to the public concerning business licenses.</li> </ul>	
PSC Access Limited Confidential Business Licenses Data	Allows users to access a limited amount of confidential data, such as the business owner's name, address, email, and phone number.	PSC Building Inspector PSC Chief Building Officer

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Code Enforcement Supervisor  PSC Inspections Supervisor  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](#).

## Managing Business Information

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

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

For a license application submitted using the business information of an existing business in the system, the associated business record is updated based on the entries in the new application. The integration between the business record and the license application enables you to view the latest information in the business detail pages.

**Note:** Authorized agency users can update information on the business pages. All the changes are automatically synced to the current business licenses as well as the in-progress activities for the business.

Here’s how you access the business detail pages:

1. Select the **Businesses** tile on the Agency Springboard.  
Registered users access the **Businesses** tile on the landing page.
2. On the Businesses page, click the row for a business.
3. Navigate to business information using the links in the left panel.

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

Page Name	Description
Overview	Displays the legal name and status of the business.  If business is inactive, the status also shows the date of inactivation. See <a href="#">Inactivating Business Licenses</a> .

Page Name	Description
	<p>Use the <b>Hide Business from Public View</b> switch to allow authorized users to manage the display of business information to public users. By default, this switch is turned off. When the switch is turned on, the business and all its associated business licenses are hidden from public users.</p> <p><b>Note:</b> The <b>Hide Business from Public View</b> switch is displayed only when the agency allows hiding of a business from public view. For more information, see <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</p> <p>View the core information regarding the selected business with links to more detail.</p> <p>On the Overview page, review information, when available, about the selected business in sections, such as <i>Business Summary</i>, <i>Latest Activity</i>, <i>Owners or Corporate Officers</i>, and <i>Locations</i>. You can click the <i>View Details</i> links in these sections to navigate to more details.</p> <p>On the Overview page, review information, when available, about the selected business in sections, such as <i>Business Summary</i>, <i>Latest Activity</i>, and <i>Owners or Corporate Officers</i>. You can click the <i>View Details</i> links in these sections to navigate to more details.</p> <p>In the <i>Business Summary</i> section, click the legal name link to open the Business Details page.</p> <p>The <i>Owners or Corporate Officers</i> section displays the owner and up to three previous owners, at a time. If there are more owners, click the chevrons to go forwards and backwards in the list. Click the button on the owner box to open a modal page to view the details.</p>
Business Details	<p>View information such as the legal name of the business, the ownership type, address, federal tax ID, fiscal year end, and other business details.</p> <p>Use the <b>Hide Business from Public View</b> switch to allow authorized users to manage the display of business information to public users. By default, this switch is turned off. When the switch is turned on, the business and all its associated business licenses are hidden from public users. See <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</p> <p><b>Note:</b> The <b>Hide Business from Public View</b> switch is displayed only when the agency allows hiding of a business from public view.</p>
Owners	<p>View a list of owners or corporate officers for the business. Click a person on the list to view detailed information about them.</p> <p>Authorized agency users can edit to update information, such as personal details, address, and citizenship status.</p>
Locations	<p>View a list of the physical locations associated with the business. Click a row on the list to view detailed information about the location.</p> <p>Use the Edit button to update location details like the Doing Business As (DBA) name, location type and address, mailing and billing addresses, and emergency contacts.</p> <p>For details, see <a href="#">Working with Business Location Information</a>.</p>
Licenses	<p>View a list of licenses associated with the business. On this page you can:</p> <ul style="list-style-type: none"> <li>Click <b>Apply</b> to initiate another license application for the business. For more information on applying for a business license, see <a href="#">Choosing an Application Type</a>.</li> <li>Drill down on each license to view more information.</li> </ul>

Page Name	Description
	<ul style="list-style-type: none"> <li>Amend or renew a business license by clicking the three-dot <b>Action</b> menu and selecting the appropriate action. <b>Amend</b> and <b>Renew</b> actions are not available for an inactive license.</li> </ul> <p>For more information on the Amend and Renew actions, see <a href="#">Managing Business Licenses</a>.</p>
Attachments	View and manage a centralized list of attachments related to business licenses, location, or entity for a business. Use the <b>Business</b> tab for business related attachments. Use the <b>Business License Activity</b> tab for license attachments.
Communication	<p>View a list of all communications associated with the business.</p> <p>Use the <b>Send Message</b> action on the Locations grid for sending adhoc communication for the business location.</p> <p>On the Ad Hoc Message page, you can specify:</p> <ul style="list-style-type: none"> <li><b>Channel Type:</b> From the drop-down list, select <i>Email, Emails and Notifications, Notification, or Text</i> as the channel type.</li> <li><b>Display Format:</b> From the drop-down list, select <i>HTML or Text</i> as the display format.</li> <li><b>Visibility:</b> From the drop-down list, select <i>Applicant and contacts, Agency staff only, or Applicant and Primary Contact</i> as the visibility.</li> </ul> <p><b>Note:</b> The registered public users can only view communications based on the visibility defined in the communication.</p> <p>Under the <i>Email Attributes</i> tab, you can:</p> <ul style="list-style-type: none"> <li><b>To:</b> Enter the recipient's email address.</li> <li><b>Cc:</b> Enter the email address to which you want to send a copy of the email.</li> <li><b>Bcc:</b> Enter the email address to which you want to send a copy of the email but hide the email address from all other recipients.</li> </ul> <p>Under the <i>Compose</i> tab, you can:</p> <ul style="list-style-type: none"> <li><b>From:</b> Enter the person's email address who is sending the message.</li> <li><b>Subject:</b> Enter the subject of the message.</li> <li><b>Message Body:</b> Type the message contents.</li> </ul> <p><b>Note:</b> You can select a number of attributes from the <b>Business</b> and <b>Location</b> to be included in the message.</p> <ul style="list-style-type: none"> <li>Click <b>Send</b> button to send the communication.</li> </ul>

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

## Updating Business Details

For all active businesses, authorized agency users can edit information on the Business Details page. All updates made on the business details page are automatically synced to the current business licenses as well as the in-progress activities for the business.

To update the Business Details page:

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

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

2. On the Businesses page, click the row for a business.
3. Click the **Business Details** link in the left panel.
4. Click the **Edit** button.

**Note:** This button is not available if the business is inactive.

Page Element	Description
<b>Business</b>	Displays the business code.
<b>Status</b>	Displays the three available statuses for a business: <i>Active</i> , <i>Inactive</i> , and <i>Pending approval</i> .
<b>Legal Name</b>	The registered name of the business.
<b>Ownership Type</b>	Select the type of ownership of the business, for example, a corporation or a nonprofit organization.
<b>Country</b>	Displays the country in which the business is located.
<b>Postal Code</b>	Enter the postal code. If you are in doubt, click the <b>Don't Know</b> link, to enter the full address.
<b>Address</b>	Enter the address of the business.
<b>Federal Tax ID</b>	Enter the federal tax identification number or the Employer Identification Number (EIN) which is used to identify the business entity.
<b>Fiscal Year End</b>	Choose the month and date of the fiscal year end for the business.
<b>Is this business a nonprofit or an exempt entity?</b>	Turn on the switch to indicate that the business is a nonprofit or an exempt entity. The available exempt types are: <i>Governmental Liaison between IRS and federal, state, and local government</i> , and <i>Religious, charitable, scientific, literary, educational</i> .
<b>Select the options for this business that may qualify for a discount</b>	Select the options for the business that qualifies for a discount. <ul style="list-style-type: none"> <li>○ <i>Veteran Owned</i></li> <li>○ <i>Minority Owned</i></li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Female Owned</i></li> <li>○ <i>Disadvantaged Enterprise</i></li> <li>○ <i>Small Business</i></li> </ul>

5. Click **Save**.

## Adding Business Owners

1. Select the **Businesses** , **Business Licenses**, or **Business License Transactions** tile on the Agency Springboard.  
Registered users access the **Businesses** tile on the landing page.
2. On the businesses page, business license page, or business license transaction page, click the desired record.
3. Click the **Owners** link in the left panel.
4. Click the **Add** button to open the **Owners or Corporate Officers** modal page.

Page Element	Description
<b>Status</b>	Displays the three available statuses for an owner: <i>Active</i> , <i>Inactive</i> , and <i>Pending approval</i> .
<b>Name details</b>	Includes preferred salutation, first, middle and last names, and suffix and title, if any for the name.
<b>Postal Code</b>	Enter the postal code. If you are in doubt about the postal code, click the <b>Don't Know</b> link, to enter the full address.
<b>Ownership Percentage</b>	Enter the ownership percentage.
<b>Driver's license</b>	Enter the license number, issuing state, and expiration date.
<b>Phone</b>	Enter the phone type, code, number and extension.
<b>Citizenship Status</b>	Displays the three available citizenship statuses for an owner: <i>H4 Visa</i> , <i>US Citizen</i> , and <i>Unknown</i> .

5. Click **Save**.

**Note:** Whenever a person is added as an owner to a business or business application, business license, or business license transactions, the person also gets automatically added as a contact.



The primary contact and contact users who have full access to the application or have access to–view the application, pay fees, and print license–can view the application details. Contacts also see the applications they applied for themselves. See *Working with Application Contacts* and *Setting Up Contact Types*.

## Updating Business Owner Information

1. Select the **Businesses**, **Business Licenses**, or **Business License Transactions** tile on the Agency Springboard. Registered users access the **Businesses** tile on the landing page.
2. On the businesses page, business license page, or business license transaction page, click the desired record.
3. Click the **Owners** link in the left panel.
4. On the Owners or Corporate Officers page, select the row for a business owner and click the **Edit** button to update the information.
 

**Note:** You can use the **Edit** button to change the status of an owner from *Active* to *Inactive* or *Inactive* to *Active*. However, owners in the *Pending approval* status can't be updated.
5. Click **Save**.

## Working with Business Location Information

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

Business location information is configured on the business license 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 business, business license, and transaction.

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

## Viewing Business Location Information

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

1. Select the **Businesses**, **Business Licenses** or **Business License Transactions** tile on the agency springboard.
2. Depending on the tile selected:
  - o On the Businesses page, click the row for the business you are working with. Click **Locations** from the left navigation pane and click the row to view the location details.
  - o On the Business Licenses page or Transactions page, click the row for the business license application you are working with. Expand the **Business Information** menu from the left panel, and click **Location** to view the location details.
3. On the Location Details modal page, view detailed information about the business location.

Page Element	Description
Status	Displays the current status of the business location. Options include: <i>Active</i> or <i>Provisional</i> .

Page Element	Description
	If business location is inactive, the status also shows the date of inactivation. See <i>Inactivating Business Licenses</i> .
<b>Location ID</b>	Displays the identifier of the business location.
<b>Doing Business As</b>	Displays the name by which the business is conducted, also known as DBA.
<b>Business Description</b>	Displays the business description.
<b>Website</b>	Displays the website address associated with the business.
<b>Physical Location</b>	View details in this section about the physical location associated with the business.  <b>Note:</b> If the physical location changes within the agency's jurisdiction, the address is updated for pending, requested, or scheduled inspections. If the physical location moves outside of the agency's jurisdiction, pending, requested, or scheduled inspections are canceled.
<b>Is this a mobile business?</b>	Turn on this switch to indicate if the business provides a mobile product or service.
<b>Is this business physically located within the agency's jurisdiction?</b>	Turn on this switch to indicate if the business location is within the agency's jurisdiction.
<b>Address</b>	Displays the address of the business location.  For agency staff, the address displays as a link, when it exists within the agency's jurisdiction. Click the address link to open the Address Details page in a new tab.
<b>Parcel Number</b>	Displays the parcel number of the property associated with the business location. This is also known as the assessor's parcel number (APN) for the parcel.  For agency staff, the parcel number displays as a link, when the parcel associated with the business location exists within the agency's jurisdiction. Click the parcel number link to open the Parcel Details page in a new tab.
<b>Location Type</b>	Displays the location type. Values include <i>Commercial</i> , <i>Industrial</i> , <i>Mixed Use</i> , or <i>Residential</i> .
<b>Mailing and Billing Address</b>	View the mailing and billing addresses associated with the business.

Page Element	Description
<b>Is the mailing and billing address the same as the physical location?</b>	Turn on this switch to indicate that the mailing and billing addresses are the same as the physical location of the business.
<b>Mailing and Billing Address</b>	View and update details, such as: <ul style="list-style-type: none"> <li>○ <i>Primary Phone Type</i></li> <li>○ <i>Primary Phone</i></li> <li>○ <i>Alternate Phone Type</i></li> <li>○ <i>Alternate Phone</i></li> <li>○ <i>Email</i></li> <li>○ <i>Category</i></li> <li>○ <i>Subcategory</i></li> <li>○ <i>Proposed Start Date</i></li> <li>○ <i>State Tax ID</i></li> <li>○ <i>City Tax ID</i></li> <li>○ <i>County Tax ID</i></li> <li>○ <i>State Equalization Board Number</i></li> </ul>
<b>Emergency Contacts</b>	View and update details such as: <ul style="list-style-type: none"> <li>○ <i>Contact 1 First Name and Contact 2 First Name</i></li> <li>○ <i>Contact 1 Last Name and Contact 2 Last Name</i></li> <li>○ <i>Phone Type</i></li> <li>○ <i>Phone</i></li> <li>○ <i>Email</i></li> <li>○ <i>Availability</i></li> </ul>

## Modifying Location Details

1. Select the **Businesses**, **Business Licenses** or **Business License Transactions** tile on the agency springboard.
2. Depending on the tile selected:
  - On the Businesses page, click the row for the business you are working with. Click **Locations** from the left panel and click the row to view the location details. Use the **Edit** button to modify the location details.
  - On the Business Licenses page or Transactions page, click the row for the business license application you are working with. Expand the **Business Information** menu from the left panel, and click **Location** to view the location details. Use the **Edit Location** button to update the business location details.

**Note:** The **Edit Location** button is unavailable if the location is inactive. See *Inactivating Business Licenses*.

3. On the Location Details modal page, modify details such as:
  - **Doing Business As** or DBA name, business description, and website of the business

- o Property Address and Parcel Number

**Note:** Use the Search Property field to correct any administrative mistakes while selecting the physical location and not to move the business to a new location.

**Note:** The address and parcel number display as links when the business location is associated with a property that exists in the agency's database. Click the link to navigate to the corresponding Address Details page and the Parcel Details page.

- o Location Type
- o Mailing and Billing Address details
- o Emergency Contacts details

4. Click **Save**.

## Viewing Additional Property References

View the **Additional Property Reference** grid that contains the GIS information for this application's selected property. This information is only available if the agency has configured the system to collect map attributes and the switch that asks **Is this business physically located within the agency's jurisdiction?** is turned on.



The GIS attributes are retrieved from map layer content and displayed in this grid in the application details after you select a property on the application. For the 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> .
<b>Value</b>	<p>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>.</p> <p><b>Note:</b> Agency staff can manually update the <b>Value</b> field. Click <b>Edit</b> for the GIS information row.</p>

Page Element	Description
<b>Location Type</b>	Displays whether this property is a parcel or address.
<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.

## Managing Business Licenses

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

Use the Business Licenses page to view summary information about business licenses and to access the details pages for individual licenses. The primary contact and contact who have full access to the application or have access to—view the application, pay fees, and print license—can view the application details. Contacts also see the applications they applied for themselves. See *Working with Application Contacts* and *Setting Up Contact Types*.

Agency staff can access the Transactions page by clicking the **Business Licenses** 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 of Business Licenses

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

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

## Managing Business Licenses

To manage business licenses:

1. Select the **Business Licenses** tile on the agency springboard.

2. Review the following business license information:

Page Element	Description
<b>License</b>	Displays the license ID, application type, <i>Active</i> if the license is active, and information about the expiration date. If the license is about to expire, the expiration information additionally includes a warning icon and the number of days remaining until the expiration date.
<b>License Period</b>	Displays the period for which the business license was issued and the expiration date for the license. These dates are updated for renewals.
<b>Business Information</b>	Displays the business name (the DBA) and the address for the licensed location. This can be different from the name and address of the business itself.  If the application indicates that the location is outside of the agency's jurisdiction, the address of business is displayed instead of the specific location.
<b>Description</b>	Displays the description from the origination application, or from the renewal or amendment if the license is renewed or amended.  Applicants optionally enter a description during the application process. Agency staff can add or update descriptions on the Activity Summary page of the origination, renewal, or amendment transaction.
<b>Fees</b>	Displays the total fees and remaining balance for the business license, including the license origination, renewal, and amendment transactions. When all fees are paid, you'll see <i>Fees Paid</i> next to the amount.

3. Click the three-dot **Action** menu and select the appropriate action. If no actions are available, clicking the menu displays an explanatory message.

Use the View Certificate option to view a business license certificate. You can also download and print this certificate.

If no actions are available, clicking the menu displays an explanatory message.

Action	Description
<b>Amend</b>	Select this action to start the process for amending a business license.  This action is not available if the license already has a renewal or amendment in progress or if the business license type is not configured to allow amendments.
<b>Inactivate</b>	Select this action to start the process for inactivating the license.

Action	Description
<b>Renew</b>	Select this action to start the process for renewing a business license. This action is available for licenses that are about to expire (as defined in the expiration rules) unless the license already has a renewal or an amendment in progress.
<b>View Certificate</b>	Select this action to view the business license certificate.

**Note:** You cannot renew or amend the license if it has a condition applied on the license with the rule Prevent Application Progress for license renewal or amendment. When you click the **Amend** or **Renew** button, a message appears that there are conditions applied. If you click **Cancel**, the message window closes without any action. If you click **OK**, the amendment or renewal application form opens for the user to fill in the details. When you click **Submit**, the form is saved with a **Pending** status because of the applied conditions. You can return to the form and resubmit after the conditions are resolved. For details about business license conditions, see [Applying Conditions to Business Licenses](#).

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

## Viewing the Business License

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

When you access the details for a business license, you see a summary of the business information. This header information is updated to show the latest from the intake form submitted by the applicant. The header also displays the status of the license—*Active*, or *Inactive*, or *Expired* along with the date from which the license has been inactive. When inactive, agency staff and users with appropriate permissions can see a **View Details** link, which will allow you to view the details of inactivation.

## Using the Overview Page

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

Page Element	Description
<b>Actions</b>	Click and select an option: <ul style="list-style-type: none"> <li>○ Amend</li> <li>○ Inactivate</li> <li>○ Renew</li> <li>○ View Certificate</li> </ul>

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

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

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



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

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

## Viewing and Printing the Business License Certificate

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

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

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

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

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

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

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

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

You can also configure the Business License certificate to include a profile picture of the applicant. You can upload images to the Business License transaction attachments tab and select the category BL\_PROFILE\_PICTURE and the subcategory BL\_LICENSEE\_IMAGE. The categories must be configured and included in a document group.

For more information, see [Setting Up Document Categories and Subcategories](#) and [Setting Up Document Groups](#).

## Viewing and Printing the Consolidated Certificate for Multiple Business Licenses

Your agency can also allow public users to view the issued consolidated certificate for multiple business licenses by enabling the **Allow Public User to View Consolidated Certificate for a location** option on the Business License Options page. See *Setting Up Agency-Level Options for Business Licenses*.

Depending on agency setup, you can view, save, and print the consolidated certificate for multiple business licenses like this:

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

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

4. Select the locations for which you want to view the consolidated business license certificates.

The consolidated business license certificate opens in a new window. If you had selected multiple locations, multiple certificates are displayed one for each location.

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

You can also view, save, and print the consolidated certificate for multiple business license directly from the Business Overview page as follows:

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

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

4. Select the locations for which you want to view the consolidated business license certificates.

The consolidated business license certificate opens in a new window. If you had selected multiple locations, multiple certificates are displayed one for each location.

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

## Viewing the Business Information

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

Business Object	Navigation
Business License Transactions	<b>Agency Springboard &gt; Business License Transactions.</b> Select the business license application record you want to access. On the Business License page select the <b>Business Information</b> tab in the left panel.
Business Licenses	<b>Agency Springboard &gt; Business Licenses.</b> Select the active business license record you want to access. On the Business License page select the <b>Business Information</b> tab in the left panel.

Business Object	Navigation
Business	<b>Agency Springboard &gt; Businesses</b> . Select the business record you want to access. On the Business page the left panel lists the tabs — Business Details, Owners, and Locations.

See also [Viewing Business Information](#).

To add new business owners to a business license, use the **Add** button on the Owners page. For details, see the section Adding Business Owners in the topic [Managing Business Information](#).

## Viewing and Editing the License Details

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

1. Select the **Business Licenses** tile on the Agency Springboard.
2. On the Business Licenses page, click the license record you want to review. The Overview page opens.
3. In the left panel, click **License Details** to view the details of the selected license.
4. On the application details page, click the **Edit** button for the section you would like to edit.
5. Update available fields on the page. For example, in the Industry Classification section, search and select additional NAICS codes.
6. Click the **Done** button to save.

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

## Viewing the License Activity

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

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

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

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

## Applying Conditions to Business Licenses

Agency staff manage the conditions that are applied on a business license. The Conditions page lists all of the conditions applied to the selected business license, with applied conditions followed by resolved conditions. You can view, update, apply, and resolve conditions applied by the agency.

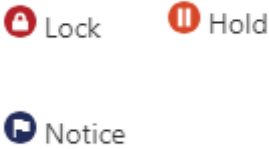
The condition indicator in the header of the details pages displays the most severe condition having a high priority. Click the **All Conditions** link next to the icon to see a list of all applicable conditions, including the condition name, severity, source, source reference, display message, and when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

**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*.

## Applying a Condition to a Business License

To apply a condition on a business license:

1. Select the **Business Licenses** tile on the agency springboard.
2. Select the license record for which you want to apply the condition.
3. From the left panel, select the **Conditions** tab.
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 for the following fields:

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 the 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 setup. 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 setup page and cannot be updated here.</p>
<b>Severity</b>  	<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 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 business license transactions that will be associated with the selected business license. You turn off the switch if you want the condition to be applied only to the business license 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>

Page Element	Description
<p><b>Include in-process transactions</b></p>	<p>Turn on this switch if you want to apply the condition to the in-process transactions related to the business 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 transactions where the condition will be applied.</p>
<p><b>Condition Rules</b></p>	<p>Select one or more rules from:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress:</b> <ul style="list-style-type: none"> <li>Business License Amendment</li> <li>Business License Renewal</li> </ul> </li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> </ul> <p>The condition rule <i>Prevent Application Progress</i> is only applicable to conditions on persons, parcels, property addresses, business licenses, and contractor licenses.</p> <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>Condition setup determines the default selection of the rules - Amendment and Renewal on this page. When applying, you decide if you want to apply the condition on amendment, or renewal, or both. You must select at least one of the rules.</p> <p>When a condition is applied, users cannot proceed with the amendment or renewal process until applied conditions are resolved. See <a href="#">Applying for a Business License Renewal</a> and <a href="#">Applying for a Business License Amendment</a>.</p> <p>See <a href="#">Setting Up Conditions</a>.</p>
<p><b>Priority</b></p>	<p>Select a priority for the condition. Values are <i>High</i>, <i>Medium</i>, and <i>Low</i>.</p>
<p><b>Description</b></p>	<p>Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.</p>
<p><b>Additional Information</b></p>	<p>Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.</p>

Page Element	Description
Applied By	Displays the name of the user or system that applied the condition with the date.

7. Click **Save**.

## Resolving a Condition

You can resolve a condition that you applied to a business license.

1. Access the Conditions page for the business license you are working with.
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. This switch appears only if the condition was applied with the **Apply Condition to Transactions** switch turned on. You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the business license.
4. Use the **View Impacted Transactions** link to access a page that lists all impacted business license transactions.
5. Click **Save**.

## Modifying a Condition

You can modify a condition that you applied to a business license. Any changes you make won't be copied over to the existing business license transactions.

1. Access the Conditions page for the business license you are working with.
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. If you enable the **Apply Condition to Transactions** switch, then the changes you save will be applied to new transactions.

**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. Access the Conditions page for the business license you are working with.
2. Select a row with a status of **Resolved** and click **View More Details**.
3. 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

- Resolution Action
  - Resolved By
  - Resolved Date
4. a. Click **Cancel** to return to the Conditions page.

## Applying for a Business License Renewal

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

Agency staff and businesses can renew business licenses for the types of licenses that are configured for renewals by the agency. When the license is about to expire, you can begin the renewal application process. You can also renew the license when the license expires and after the license has expired, based on your agency's license expiration setup. A renewal application must be fully processed before you can start another renewal or an amendment.

**Note:** The primary contact and contacts with full access to business license can apply for renewal and amendment. For details about contact types, see *Setting Up Contact Types* and *Working with Application Contacts*.

Here's the flow for renewing a business license:

1. Click **Renew**.

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

**Note:** You cannot submit a renewal application if it has a condition applied on the license with the rule Prevent Application Progress for license renewal. When you click the **Renew** button, a message appears that there are conditions applied. If you click **Cancel**, the message window closes without any action. If you click **OK**, the renewal application form opens for the user to fill in the details. When you click **Submit**, the form is saved with a **Pending** status because of the applied conditions. You can return to the form and resubmit after the conditions are resolved. For details about business license conditions, see *Applying Conditions to Applications*.

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

In the renewal application form, you'll see the information copied from the most recent license transaction. This can be the license origination, an approved amendment, or a previous renewal. The industry standard classification codes (NAICS) that are associated with the business license are also copied over to the new renewal application, which you can update in the Industry Classification section. However, tax-related details aren't copied over and you must always report them. You'll be able to update the fields that were designated for renewals in the intake form to reflect any changes. If desired, you can click **Show All** to review information that is part of the license but can't be updated.

3. Pay any required renewal fees after reviewing the details. If the renewal application is being submitted after the expiration grace period, fee components can include a penalty, interest, or late fees—as set up by your agency.

*Setting Up Fee Schedules* and *Mapping Form Fields to Decision Model Attributes*.

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

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

**Inactivated License:** When the business license related to this amendment application is inactivated, then the status of the application changes. The status changes to *Withdrawn* if the amendment application was in any of the following statuses—*Submitted*, *Accepted*, *In Process*, *Inspection*, or *License Issuance*. If the status was *Pending*, it will change to *Void*.

## Renewing Multiple Business Licenses

You can renew multiple business licenses at a time if your agency has configured multiple application selection. For more information on setting up multiple application selection for business licenses, see [Setting Up Agency-Level Options for Business Licenses](#) and [Setting Up General Information for Business License Types](#).

You can renew multiple business licenses from both the Business Overview and Business Locations pages.

Here's the procedure for renewing multiple business licenses from the Business Overview page:

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

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

4. Select the location or doing as business as to renew the associated licenses that you are authorized to renew. You can renew multiple licenses together that are associated with the same location. In case of multiple locations, licenses are displayed one for each location.

From the Renewals Started tab, you can access the renewal transaction for licenses that are already in progress.

5. Click **Renew Licenses** button to renew the selected licenses.

Here's the procedure for renewing multiple business licenses from the Business Locations page:

1. Select the **Businesses** tile on the Agency Springboard.
2. On the Businesses page, click the row for the selected application to open the Locations page.
3. On the Locations page, click **Actions** and select the **Renew Licenses** option.

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

4. Click **Renew Licenses** button to renew the selected licenses.

**Note:** If you have configured your agency settings and your business license types and forms for single intake, you can make payment for multiple business applications using the **Make Payments** tile on the Agency Springboard. For more information on making payments, see the [Making Payments for Multiple Business Applications](#) section in [Making Payments](#).



## Applying for a Business License Amendment

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

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

**Note:** The primary contact and contacts with full access to business license can apply for renewal and amendment. For details about contact types, see [Setting Up Contact Types](#) and [Working with Application Contacts](#).

Here's the flow for amending a business license:

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

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

**Note:** You cannot submit a renewal application if it has a condition applied on the license with the rule Prevent Application Progress for license renewal. When you click the **Amend** button, a message appears that there are conditions applied. If you click **Cancel**, the message window closes without any action. If you click **OK**, the amendment application form opens for the user to fill in the details. When you click **Submit**, the form is saved with a **Pending** status because of the applied conditions. You can return to the form and resubmit after the conditions are resolved. For details about business license conditions, see [Applying Conditions to Applications](#).

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

The information from the current license application, which can be the license origination or a renewal, appears in the amendment application form. The industry standard classification codes (NAICS) that are associated with the business license are copied over, which you can update in the Industry Classification section. The tax attributes are also inherited from the license transaction being amended. You'll be able to update the fields that were designated for amendments in the intake form design. Select **Show All** to view the full application, including read-only fields that can't be updated.

If configured by the agency, applicants can propose a future start date for the amendment to apply, using the **Proposed Effective Date** field. The assigned specialist processing the renewal application can approve it or

enter a new amendment effective date using the **Approved Effective Date** field, which must be made available only to agency staff. See *Viewing Business Application Information*.

For details on date entries, see the section *Applying for Future Dated Business Commencement* in the topic *Completing an Application*.

**Note:** The application contact who is initiating the amendment or renewal will be the applicant for the amendment or renewal application. When a contact of business owner type is amending or renewing the business license, only the business owner row is copied to the contact grid, and applicant row is not copied. If there is a single row for the applicant whose contact type is **Applicant**, and that applicant is copied as a contact in the new application, the contact type is removed and should be selected before saving or submitting the application. If an agency staff is initiating the amendment or renewal, they can select the applicant from the list of application contacts who are registered users in the applicant section.

3. Pay any required amendment fees after reviewing the details. Fee components can include a penalty, interest, or late fees—as set up by your agency.  
*Setting Up Fee Schedules* and *Mapping Form Fields to Decision Model Attributes*.
4. Agency staff accepts, reviews, and approves the amendment application.

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

**Inactivated License:** When the business license related to this amendment application is inactivated, then the status of the application changes. The status changes to *Withdrawn* if the amendment application was in any of the following statuses—*Submitted*, *Accepted*, *In Process*, *Inspection*, or *License Issuance*. If the status was *Pending*, it will change to *Void*.

**Note:** When an agency staff is amending or renewing the business license, they can select a different applicant using the **Select Applicant** action. The **Select Applicant** modal displays only the registered contacts, including applicant from the latest transaction of the business license that have an amendment and renewal access. The **Add Applicant** link is not displayed in the **Select Applicant** modal.

## Inactivating Business Licenses

Agency staff can inactivate a business license when, for example, the business is closed or they operate on a seasonal basis.

Registered public users such as the business owner, applicant, and contacts with appropriate permissions can request to inactivate their business license, which will be reviewed and approved by the agency staff.

When a license is inactivated, all business license transactions and inspections associated with the license are canceled. Any outstanding fee amount remains unchanged, and the payment can be processed even after the license's inactivation. If set up, the system automatically sends an email notification that the license has been inactivated.

## Effect of License Inactivation on Business and Location

When you inactivate a business license, the location for which the license is issued and the business that holds the license will be automatically inactivated based on their status and associations.

The location will be inactivated if the location is **not** associated with any:

- Active business license **and**
- In-progress license in *Origination* activity status

Any associated in-progress business license transaction for the inactivated license will also be automatically inactivated.

The business will be inactivated if the associated location is inactivated **and** if there is no other active or provisional location associated with the business.

## Inactivating a License

To inactivate a license, agency staff use the **Inactivate** action, which is available on these pages:

- Business License list page
- The license's Overview page, and
- Licenses tab of the Business page.

Access the **Inactivate** action using any of the following navigations:

1. On the Agency Springboard select **Business Licenses** > click the **Actions** menu on the business license record and select **Inactivate**.
2. On the Agency Springboard select **Business Licenses** > Click the row for an application to open the Overview page. Select **Inactivate** from the **Actions** menu.
3. On the Agency Springboard select **Businesses** > select a business record. From the left panel, select the Licenses tab. Click **Actions** for the license record you want to inactivate and then select **Inactivate**.

**Note:** The **Inactivate** action is not available on business licenses pages when accessed using mobile devices.

1. Select the **Inactivate** action and enter details on the Inactivate Business License page:

Page Element	Description
<b>License Information</b>	View the business name, location, license ID, license type, and any fee due to be paid.
<b>Requester Name</b>	<p>Enter the name or search and select the name of the requester by clicking the <b>Select Requester</b> link. The modal page displays the applicant's name and contacts with full access to the application.</p> <p>If the selected requester is an agency staff, select the check box <b>Requester is agency staff</b>, which is available below this field.</p> <p><b>Note:</b> If you select the check box, the registered public user view will show the requester's name as <i>Staff</i> and the rest of the requester information is unavailable.</p>
<b>Requester Title</b>	Enter the title of the requester.
<b>Requester email</b>	Enter the email ID of the requester.

Page Element	Description
<b>Requester Phone</b>	Enter the phone number of the requester.
<b>Effective inactivation date</b>	Select the date on which the business became inactive.
<b>Reason for Inactivation</b>	Select from options: <ul style="list-style-type: none"> <li>○ Business closed</li> <li>○ Business sold</li> <li>○ Other</li> <li>○ Business moved out</li> </ul>
<b>Additional Details</b>	Enter any additional information related to the inactivation.

2. Click **Continue** to submit the request and return to the previous page.

After the inactivation request is approved, the process cancels all transactions and inspections related to the license and shows the license status as *Inactive*.

The header of the business license detail page displays a **View Details** link to agency staff, applicants, contacts with full access, and contacts with access to *View, Pay and Print* the license. Clicking the link opens the Inactivate Business License page to show the details as explained above. For applicants, contacts with full access, and contacts with access to *View, Pay and Print* the license, the page shows the requester name as Staff.

If there are renewal or amendment applications that were submitted before inactivating the license, the activity status of the renewal or amendment applications changes as illustrated in the following table:

Activity status before inactivation	Activity status after inactivation
Submitted	Withdrawn
Accepted	
In process	
Inspection	
License Issuance	
Pending	Void

## Sending Notifications

Your agency can configure communications using the *Business License Inactivated* communication event to send notifications.

The inactivation communication resources and events are also registered with the Business Rules Framework. For more information about the event to be configured for sending notifications for business license inactivation, see *Delivered Communication Events* and *Working with Communications*.

The *Business License Inactivated* event generates a notification when the license's status changes from Active to Inactive. The template for this event can include information about the inactivation and detail about the due fees amount. When a business license is inactivated, only the current contacts on the most recent transaction will be contacted.

Your agency determines whether the notifications are sent by email or online notification when the user logs into the Oracle Permitting and Licensing service.

## Reactivating a License

Registered public users such as the business owner, applicant, and contacts with appropriate permissions can request to reactivate their inactive business license, which will be reviewed and approved by the agency staff.

To reactivate a license, applicants and agency staff use the **Amend** action, which is available on these pages:

- Business License list page
- The license's Overview page, and
- Licenses tab of the Business page.

1. The amend action takes the applicant to the amendment application form for the business license type.
2. In the **Amendment Information** section, turn on the **Reactivate License** check box and in the **Proposed Effective Date** field, enter a date from which you want the license to be active.
3. Submit the form for approval after filling out the remaining details.

**Note:** The status of the business and the location associated with the selected license will change to *Provisional* if they were inactive at the time of requesting the license reactivation.

4. Agency staff accepts, reviews, and approves the amendment application for reactivation.

Once the amendment application is approved for reactivation, the inactive business and the location associated with the license will also be activated. For details on amendment, see *Applying for a Business License Amendment*.

Agencies can configure a Business Rules Framework event to automatically send notifications once the business license is reactivated.

Agency administrators configure send communication actions in the Business Rules Framework. You use the *Business License Reactivated* event to configure the business rule. For details, see *Setting Up Send Communication Actions*.



# 12 Managing Property Information

## 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
Business Licenses	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>

Page Element	Description	Additional Information
<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.
<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.



Page Element	Description
<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.

- 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.

## 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](#).

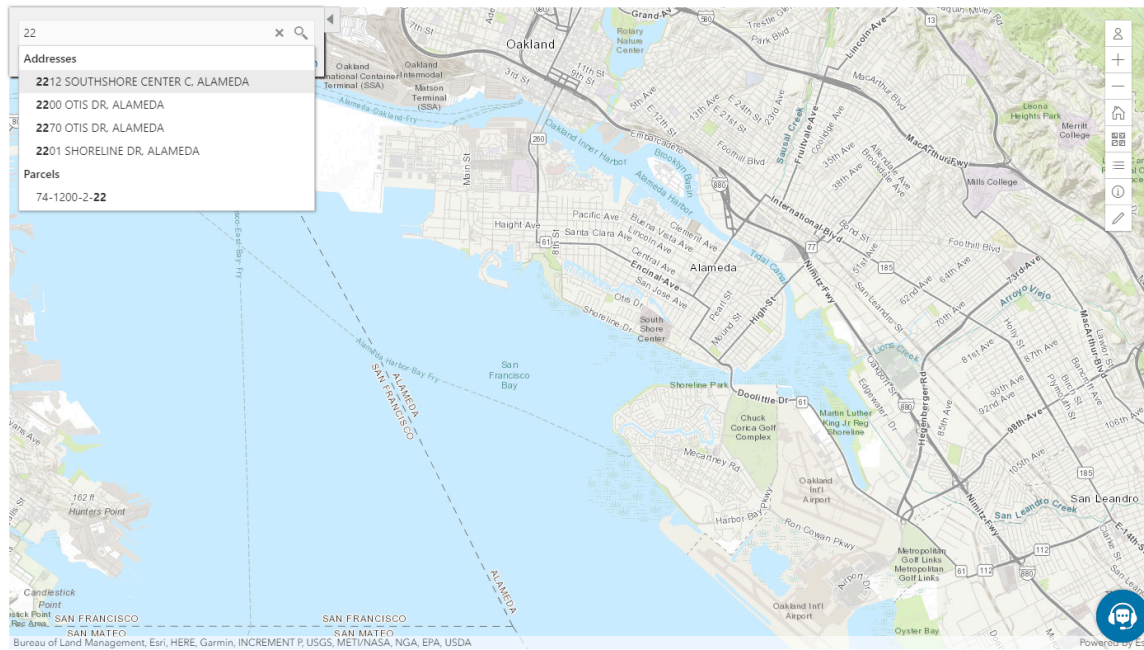
# 13 Working with Maps

## 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.	<p>Choose properties and other GIS objects to associate with the application.</p> <p>See <i>Working with Property Information</i>.</p>
Mobile inspection	Agency staff	Use the Oracle Inspector mobile application.	View permits and planning applications on a map.



Map Name	Users	Navigation	Usage
			See <i>Overview of Mobile Oracle Inspector for Permits</i> .
Permit list	Agency staff Registered public users	For agency staff: access the application lists on the <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

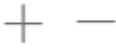








Image	Name	Configuration	Description
			displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the <b>Enable Zoom</b> switch on the map profile.	Use these tools to zoom in or out.  You can also double-click a map location to zoom 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.

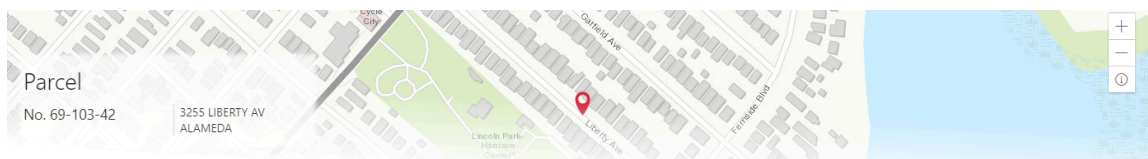
## Viewing Map Markers

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.

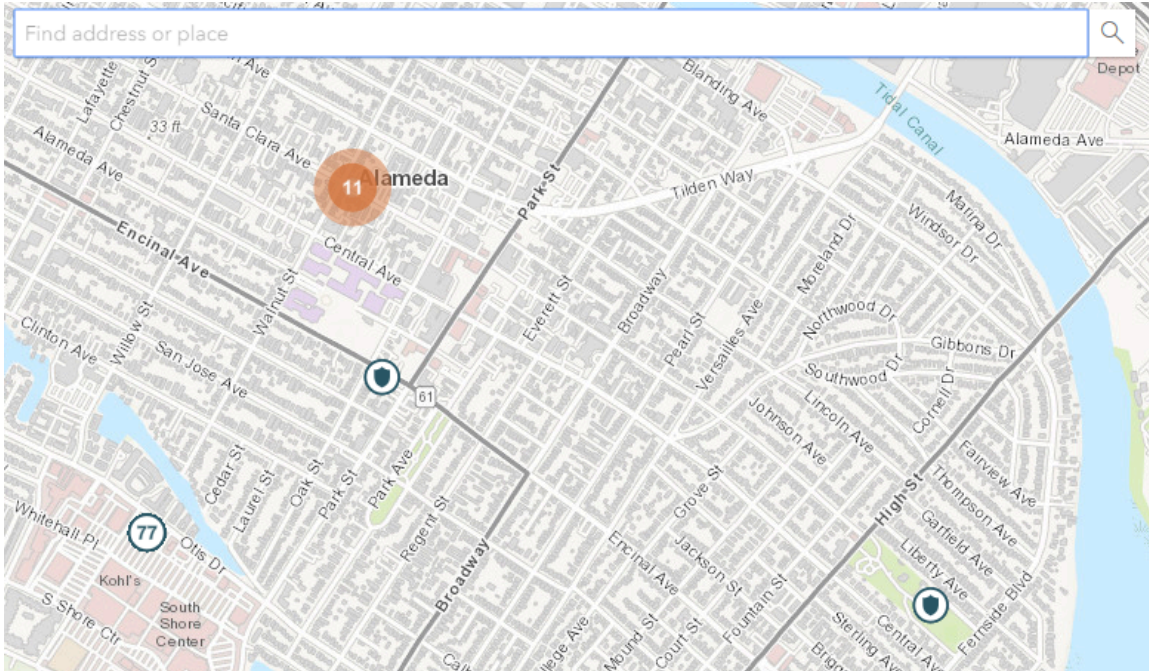


### Other Map Markers







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:

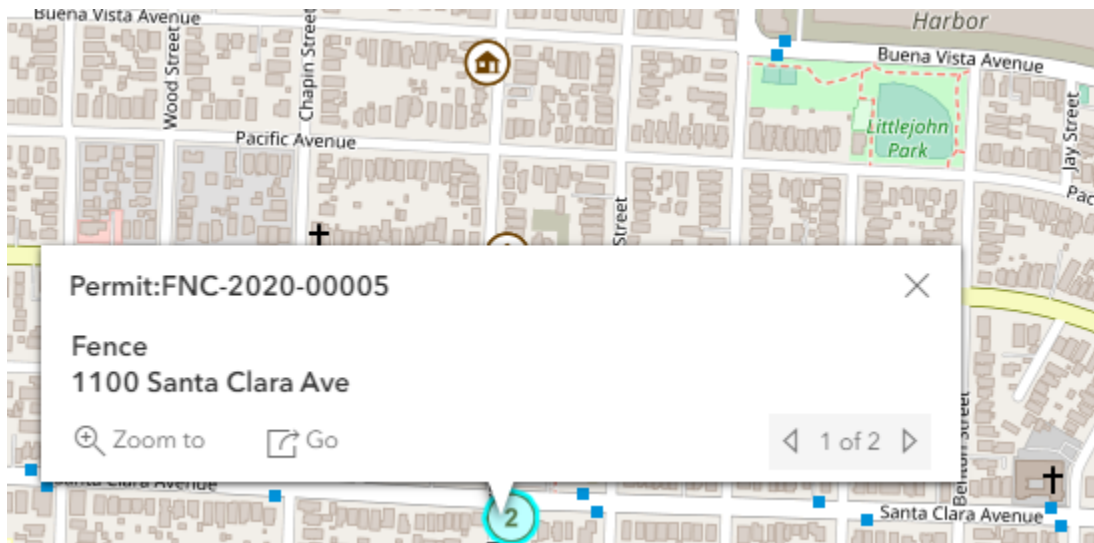
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. 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.

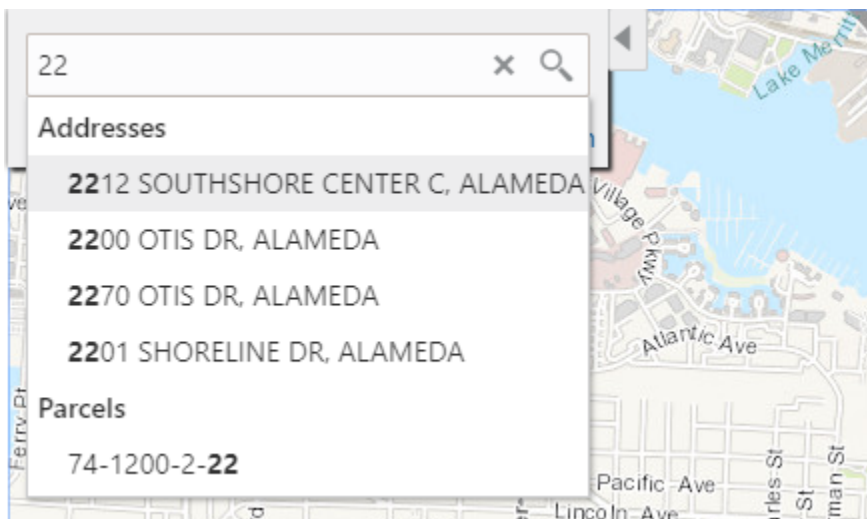
- Search for transactions and view transaction markers on the map.

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](#).

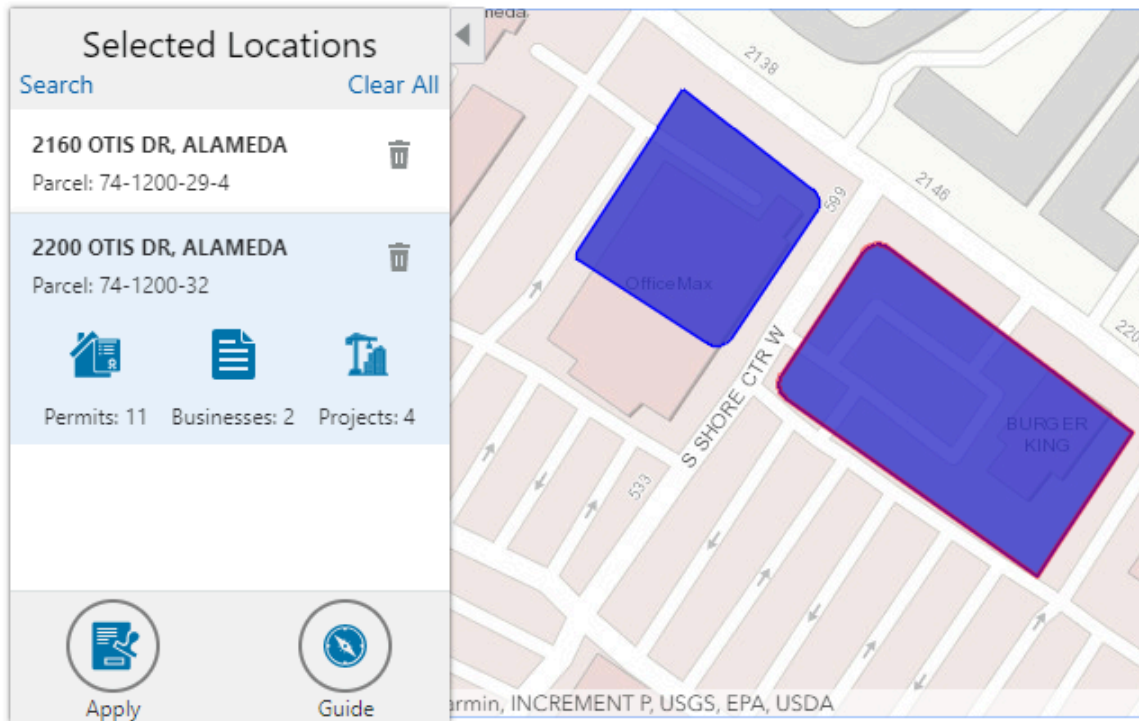
### Selecting Properties Using the Basic Search

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.

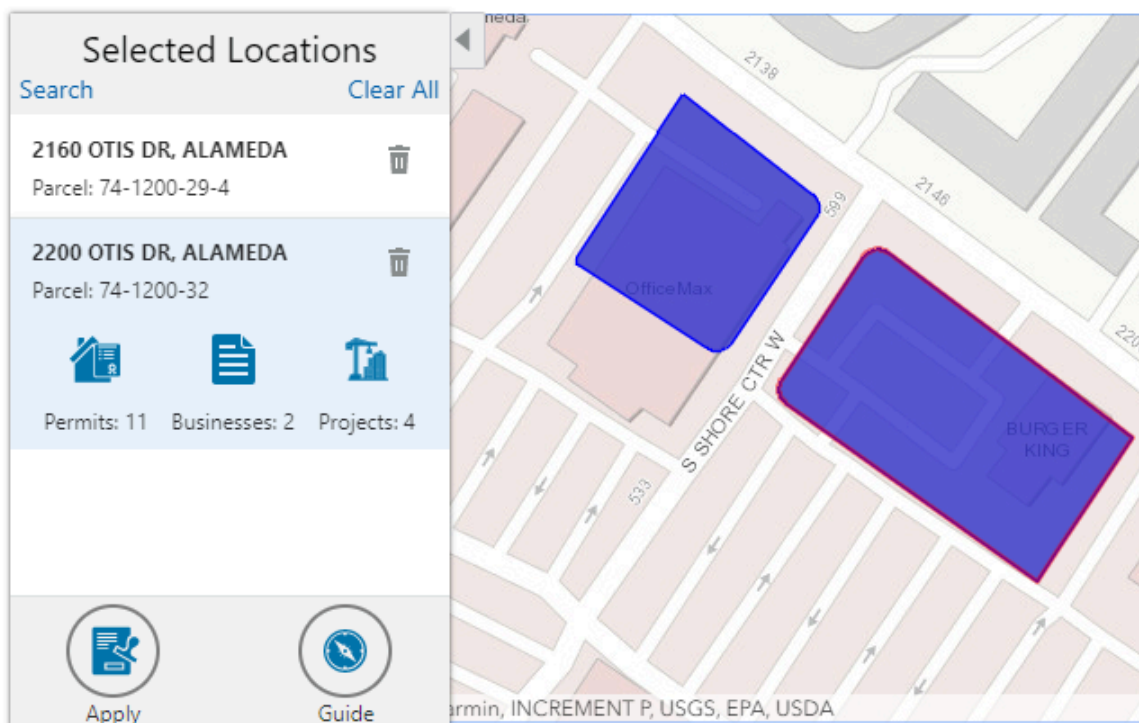
**3.** Review details of your selections on the Selected Locations list.

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).

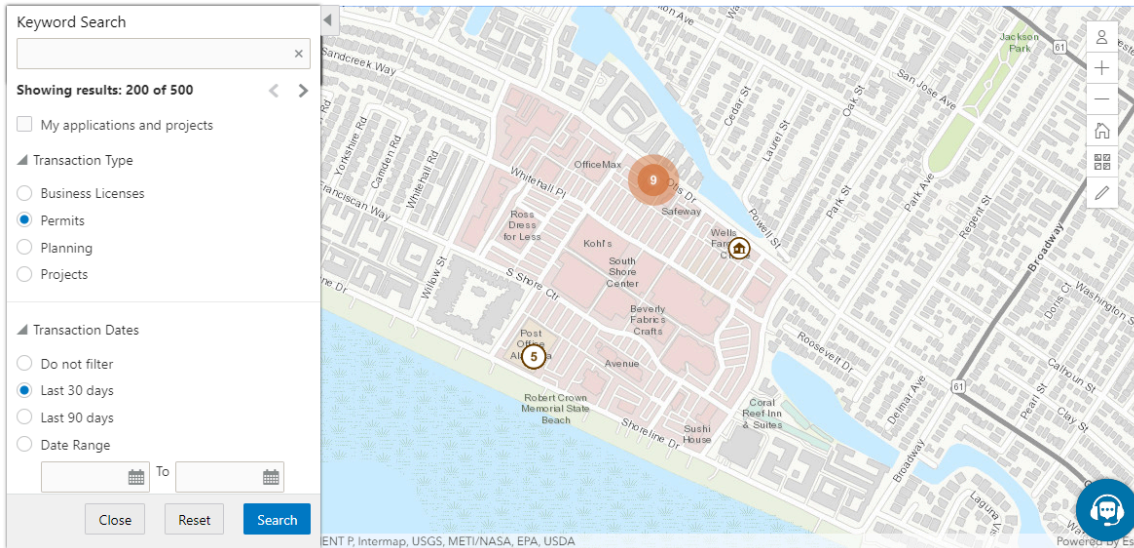
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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.

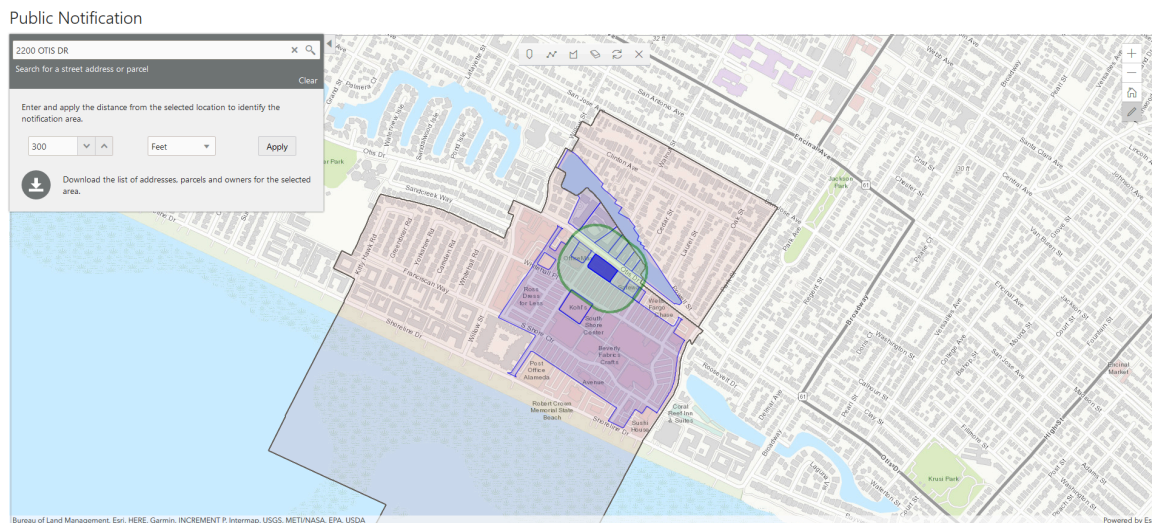
5. Click **Search** to perform the search.  
Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.  
Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons 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) | Search | 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



- Payment transaction ID
- Receipt date
- Amount Paid
- Currency
- Payment amount
- Payment currency
- 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.

- Record ID
- Record type
- Payment Status
- 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	PMTQAACONDTST	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	>

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## Reviewing Invoice History

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

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

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

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

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

This example shows the Invoice History Details page.

Cancel Print Invoice

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

Invoice Lines

Description	Line Amount	Invoice Currency
Electrical Fees	148.80	USD

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

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

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

## Viewing and Processing Refunds

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

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

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

This example shows the Refund History page.

Refund History

Refund ID	Refund Type	Refund Method	Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processed Date
RFND_20191217101050000299540	Chargeback	Credit card	12/17/19	145.00	USD	Refunded	Cancel	2019-12-17T10:12:32.060+00:00
RFND_20191217T080744000265030	Refund	Offline	12/17/19	111.00	USD	Refunded	Cancel	2019-04-15T00:00:00+00:00
RFND_20191217T242480000295571	Refund	Offline	12/17/19	111.00	USD	Refunded	Paid in error	2019-12-18T23:34:07.520+00:00
RFND_20191217T064137000224132	Refund	Offline	12/17/19	123.00	USD	Refunded	Duplicate payment	2019-12-18T23:32:45.697+00:00
RFND_20191217T0936310000201719	Chargeback	Credit card	12/17/19	12.00	USD	Failed	Cancel	2019-12-17T09:38:01.582+00:00
RFND_20191217T0936310000260439	Refund	Offline	12/17/19	100.00	USD	Pending	Duplicate payment	
RFND_20191217T0828520000280097	Refund	Offline	12/17/19	300.00	USD	Refunded	Excess paid	2019-12-17T00:00:00+00:00
RFND_20191217T0732210000223043	Refund	Offline	12/17/19	111.00	USD	Refunded	Duplicate payment	2019-12-17T07:34:05.522+00:00

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## Reviewing Refund History

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

The Refund History page displays all of the refunds requested or processed by the agency. You can search for and sort refunds by:

- Refund ID
- Refund Type
- Refund Method
- Refund Request Date
- Refund Amount
- Refund Currency
- Refund Status
- Refund Reason
- Refund Processed Date

2. Select a refund to view additional details on the Refund Detail page.

This example shows the Refund Detail page.

Refund ID: RFND\_20210727T21418000021105E

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 Cancel [Initiate Refund](#)

On Account Reference ID: OVPY\_20210211T2211300000Z296E

Payment Reference ID: CASH\_20210211T221105005Z396669

Payment Transaction ID: RECT-2021-10004

First Name: Alden

Last Name: Richards

Amount Due: 225.00 USD

Amount Paid: 250.00 USD

On Account Date: 2/11/21

On Account Status: Unapplied

On Account Amount: 25.00 USD

Refund Request Date:

Refund Status:

Refund Amount:

Refund ID:

Receivables Receipt Status: ORA\_NONE

3. If the payment on account hasn't been refunded yet, the **Initiate Refund** button is available. Click it to initiate a refund for the overpayment. The **Refund Status** changes to *Pending*.

4. Access the Refund History page to process the pending refund. For more information, see *Viewing and Processing Refunds*.
5. Confirm that the payment's **On Account Status** shows as *Refunded* on the Payments on Account page. This example shows the status of a payment on account updated to Refunded.

Payments on Account

On Account Reference ID	First Name	Last Name	Payment Transaction ID	On Account Date	On Account Amount	Currency	On Account Status
OVPY_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
<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.

## Reconciling Orphaned Payments

Reconcile orphaned payments at scheduled intervals using the Sync Card Payment Status process.

An orphaned payment is a payment that has been processed by a payment gateway, but not recorded in Permitting and Licensing.

The Sync Card Payment Status process reads orphaned transactions from the checkout table, calls the Fusion Payments API to get the status from the payment gateway, and invokes a payment response for all those transactions.

To initiate the process, access the Sync Card Payment Status page by:

- Selecting **Billing and Payment > Sync Card Payment Status** in the navigator.
- Clicking **Schedule New Process** in the Process Monitor, and selecting *Sync Card Payment Status*.

## 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>o <i>Once</i>: Select to run the process one time only.</li> <li>o <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>o <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>o <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <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</i> or <i>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> <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>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](#).

## Voiding Checkouts

Sometimes payment gateways provide a response that cannot be interpreted as fee paid or fee unpaid.

An example is: HTTP400 Bad Request: The payment system failed to provide a valid response. In such cases OPAL will not reset the fee status to Due. Agency staff will have to void checkout data to reset fees to Due manually. This action cannot be reversed, so Agency Staff should make attempts to reconcile payments online or by using the Oracle Enterprise Scheduler (ESS) payment sync job first.

### Managing Checkout Transactions

1. Select **Billing and Payment > Manage Checkout Transactions** page in the navigator.

2. Search for the checkout transaction and select it to view the **Checkout Details** page.
3. Click the **Void Checkout** button. You will get a message that this action will delete the checkout data and reset the associated fees back to Due. This action cannot be reversed.
4. Click **OK** to continue.

## Reversing Payment Application Errors

Agency staff may accidentally record a payment against the wrong permit, planning application or business license.

Agency staff can now recover from such mistakes by unapplying a payment for a permit, planning application or business license. When Agency Staff unapply the payment, the system will:

- Create an On-Account Receipt.
- Re-instate the fee for the un-applied permit, planning application or business license.

Agency Staff can either refund the on-account receipt or apply the on-account receipt to pay fees for a different permit, planning application or business license.

Agency staff can unapply payments using the **Unapply Payment** button on the **Payment History Details** page.

The agency needs to configure a reversal reason. For more information, see [Setting Up Agency Payment Options](#).

Additionally, the agency needs to configure journal line rules for the event type Fee Payments Unapplied. For more information, see [Selecting an Accounting Framework](#).

## Correcting Payment Application Errors

1. Select **Billing and Payment > Payment History** page in the navigator.
2. On the **Payment History** page, click the transaction you want to reverse.
3. Click the **Unapply Payment** button.
4. On the **Fees to Unapply** modal window, choose a **Reversal Reason**, and click **Submit**.

# 15 Working with Accounting

## Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

### Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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

## Generating Journal Entries

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

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

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

### Entering Generate Accounting Process Parameters

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

## Scheduling the Process

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

Page Element	Description
<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.

## Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

### Viewing Journal Entries

Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- *Created*: Indicates that the journal has been created but not validated.
- *Error*: Indicates that the journal has one or more validation errors.
- *Valid*: Indicates that the journal has been validated and is ready to be exported.
- *Sent*: Indicates that the journal has been exported to a file that can be used to update an ERP system.

## Reviewing Accounting Lines

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
  - o **Account**
  - o **Division**

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

## Viewing Journal Entry Errors

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

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

## Exporting Journal Entries

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

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

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

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

## Entering Export Journals to ERP Process Parameters

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

Page Element	Description
<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.

Page Element	Description
<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>	<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>

Page Element	Description
<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> <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 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

Y 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 Working with Reports

## Generating Reports

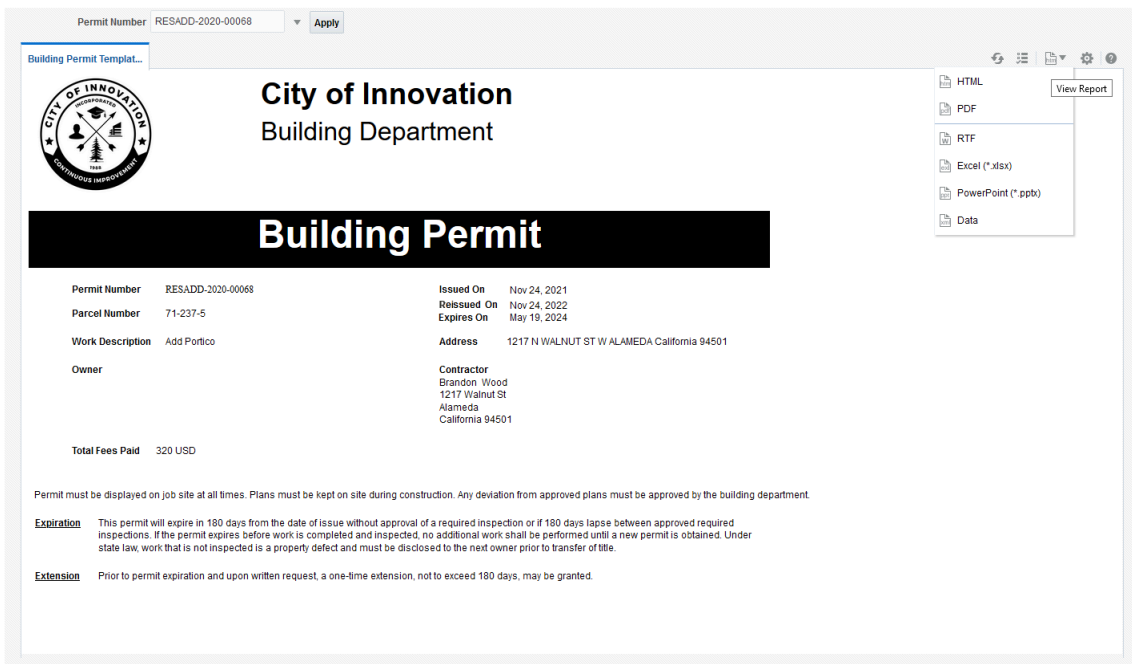
Agency staff have the option of generating BI Publisher reports from a central location instead of navigating to the various pages where reports are found. The report list includes all reports, such as permit activity, building permits, business license certificates, receipts, deposit slips, inspection summaries, code enforcement case history, and many more.

You can only access the reports that are available to you based on the permissions setup for the reports in the BI catalog. System administrators can generate all reports and also edit them. For more information about setting up permissions, see [Granting Catalog Permissions](#).

For a list of delivered reports, see [Oracle Permitting and Licensing Analytics](#).

This example illustrates the generated report for a building permit from the report list.

The report generated with the selected parameters appears on the left and the view options are accessible through the View Report menu on the right.



Here's how to generate a report from the Report List page:

1. Click the Reports and Analytics icon in the global header on the agency springboard. Select the **Report List** link. Or select **Common > Report List** in the Navigator.
2. Expand the Public Sector section in the left panel of the Report List page.
3. Click the category that the report is filed under. For example, you'll find the Building Permit Report in the Permits category.
4. Click the report name in the right panel. The report loads in a new browser tab.

5. Select values for the available parameters and click **Apply**. For example, if you're logged in as a cashier, you can enter the session ID and reconciliation ID for the Cashier Session Reconciliation Report. Processing generates the report in the browser window in HTML.
6. Click the **View Report** icon in the upper right corner of the page to open the generated report in PDF in your browser. You can also open the generated report as a file by selecting RTF, Excel, or PowerPoint. To open the report in XML without a stylesheet, select the Data option.
7. If you're a system administrator, you can click the **Actions** icon to edit the report.

# 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 >

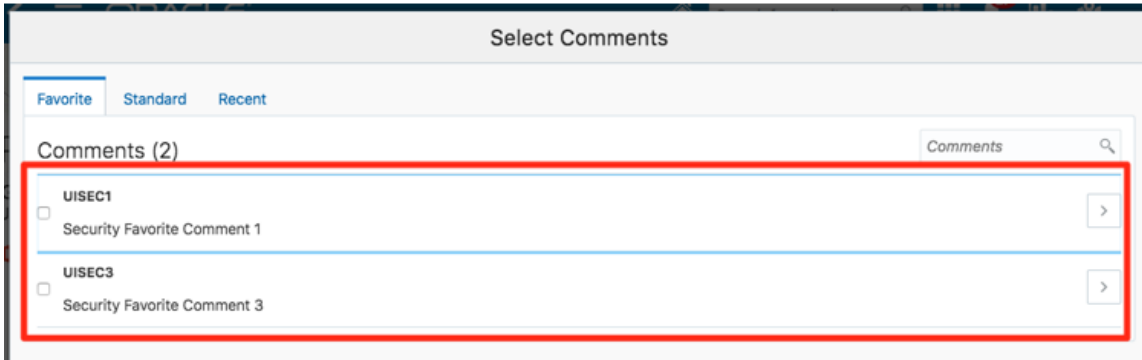
Page | 1 | of 22 (1-11 of 240 items) | < | 1 | 2 | 3 | 4 | 5 | ... | 22 | > | ✕

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.



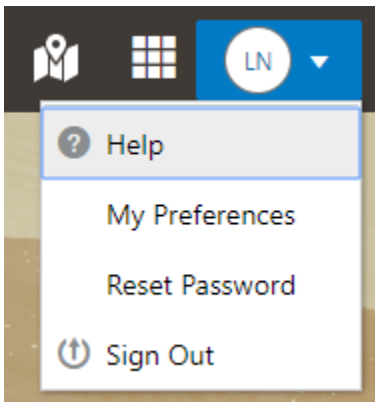
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the 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
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

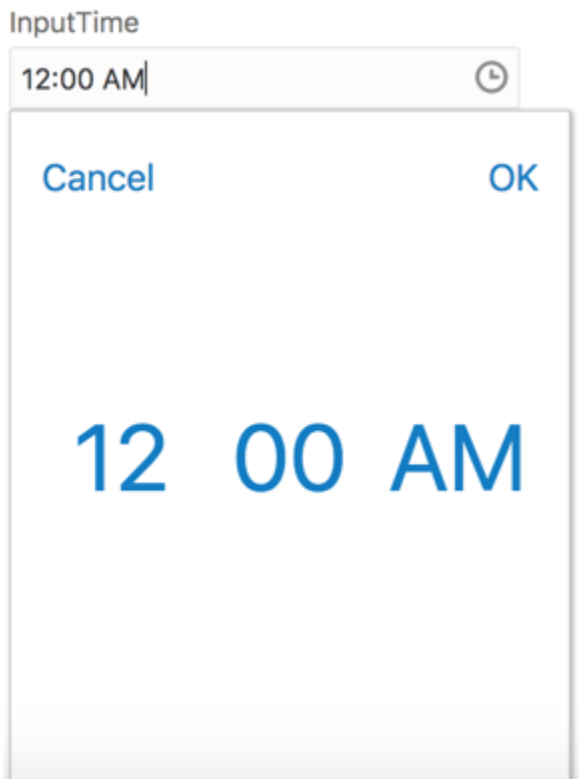
Today

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

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

## Time

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



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

## Accordion

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

### Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements

Group box

Text field

Number field

Date time field

Switch

Text area

Radio button set

Check box set

Drop-down list

Multi-Select list

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

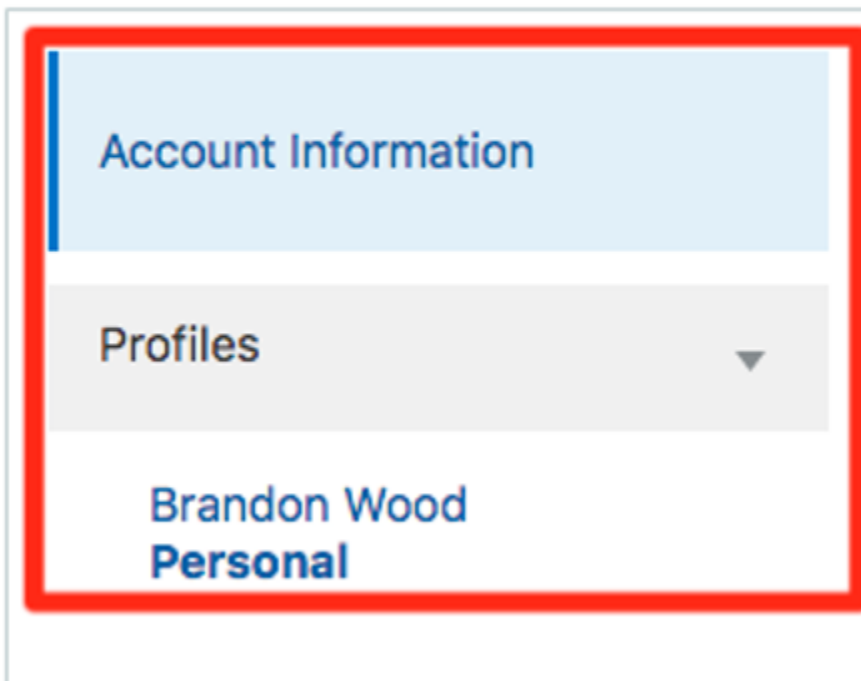
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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

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

## Navigation Lists

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

# Manage Account



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

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



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

## Tab Bars

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



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

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