

# Oracle Public Sector Permitting and Licensing

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## **Configuring User Experience**

24A



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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 Configuring Navigation

## Configuring Menu Structure

This topic describes the elements of the delivered menu structure, and describes how to change labels for menu folders and menu links.

You can open delivered menus and make minor changes to menu items to meet your needs, such as modify labels and add new links. A menu is delivered with a predefined set of menu items.

Oracle Permitting and Licensing delivers these common menus:

- Product setup: Links all common setup pages.
- Products: Links considered to be widely used by agency staff members to process transactions.

And these application specific menus:

- Mobile Inspector: Links used in the Mobile Inspector mobile app.
- Mobile Code Officer: Links used in the Mobile Code Officer mobile app.
- Code Enforcement: Links specific to the Code Enforcement offering.

Menu Item	Description
Root Folder	The root of the menu structure. It contains all menu folders and menu links within the menu. A menu has only one root folder.
Menu Folder	Enables you to group menu links. A menu folder can contain one or more menu links. There is only one layer of menu folders within a root folder.
Menu Link	Represents the actual link to the underlying application page. An end user clicks the menu link to access the associated page.

## Working with Menus

To open a menu:

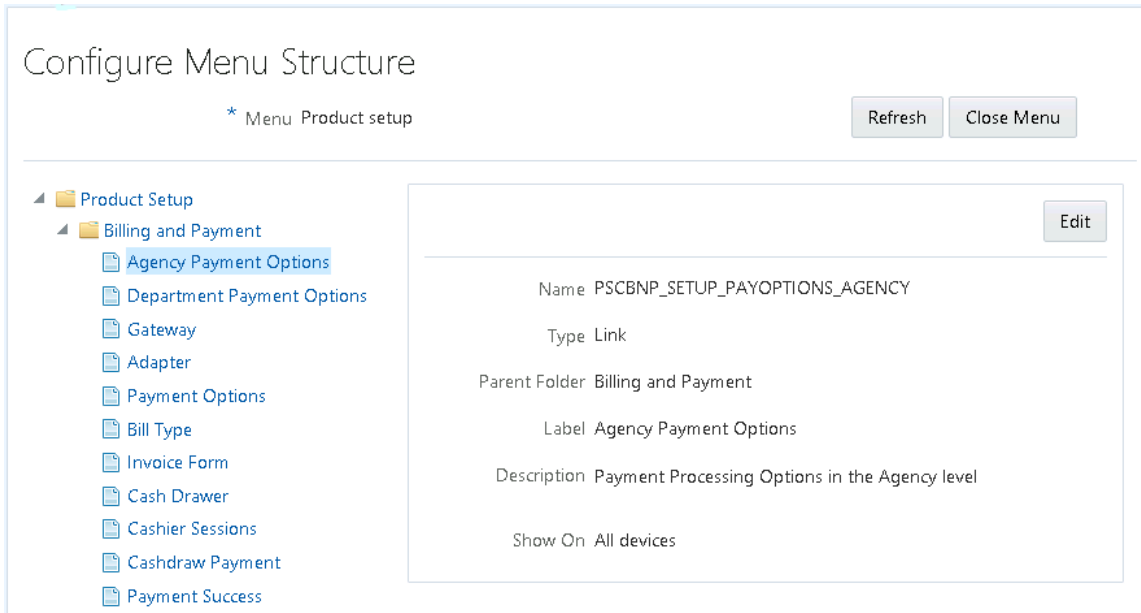
1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select a menu from the Menu drop-down list.
3. Click **Open Menu**.

To close a menu, click **Close Menu**.

To view changes to the menu structure, click **Refresh**.

## Selecting a Menu Item

When working with menu items, you have a graphical representation of the structure on the left-hand side of the page, showing all the menu folders and menu links within the menu structure.



Select an item in the menu structure to view the details related to that menu item. Depending on the item selected, you have these options for configuring the menu.

Page Elements	Description
<b>Refresh</b>	Refreshes the menu view to incorporate any recent changes you have made.
<b>Close Menu</b>	Closes the menu currently open.
<b>Edit</b>	Modify an existing menu folder or menu link.
<b>Add Link</b>	Add links to an existing root folder or menu folder.  When you click <b>Add Link</b> , the Link Details page includes an additional section of configuration properties to specify the target URL.

## Configuring General Menu Item Properties

Menus contain menu items, which can be menu folders or menu links. Most of the properties you can view and set for menu folders and menu links are the same. Properties specific to a particular menu item type are noted below.



### Link Details Close

- \* Name PSCPBL\_HEADER\_WIDGET\_SWITCHPF
- \* Type Link
- \* Parent Folder Header Widgets
- \* Label
- \* Description
- Icon
- \* Sequence
- \* Show On
- Show on Springboard
- Show in Page Finder
- \* Context Menu

Page Elements	Description
<b>Name</b>	Identifies the name of the menu item, as it is identified within the application. You cannot change this value.
<b>Type</b>	Indicates the type of menu item, which can be: root folder, folder, or link.
<b>Feature Area</b>	Indicates the feature area to which the link to a page belongs, if applicable, such as <i>Permits</i> .  <div style="border-left: 2px solid #d9534f; padding-left: 10px; margin-top: 10px;"> <b>Note:</b>                      Typically, this value is read-only and used internally.                 </div>
<b>Parent Folder</b>	Indicates which root folder a menu folder or menu link exists within.

Page Elements	Description
	<p><b>Note:</b> Applies only for menu folders and menu links, not root folders.</p>
<b>Label</b>	Identifies the menu item as it appears in the interface.
<b>Description</b>	Enter any descriptive text to help document the purpose of the menu item to other administrators.
<b>Icon</b>	<p>Select an image from the drop-down list to display as an icon for the menu item.</p> <p><b>Note:</b> This icon appears on these navigation features: the Navigator menu, the agency springboard, and the page finder. However, the icon may be a different size and display different color combinations depending on the navigation feature being used.</p>
<b>Sequence</b>	<p>In the case of multiple folders or menu links within a folder, set the order a menu item should appear in relation to the others. Any menu items sharing the same sequence number are arranged alphabetically. Otherwise, you can set the sequence: 0, 1, 2, 3, and so on.</p> <p><b>Note:</b> The delivered menus use hundreds as sequence values for menus and tens for sequence values for menu items. For example, the eighth menu folder in the menu structure has a sequence value of 800, and the second menu link within that menu folder has a sequence value of 20.</p>
<b>Show On</b>	<p>Select the device sizes for which the application displays the menu item. This option enables you to expose or hide menu items, as needed, depending on the device size. For example, some pages may be more suitable for larger devices, while others may have been developed specifically for smaller devices.</p> <ul style="list-style-type: none"> <li>• <i>All devices</i>: Displays on all devices accessing the system, including desktops, laptops, tablets, and smartphones.</li> <li>• <i>Tablets and larger</i>: Displays on all devices, except smartphones.</li> <li>• <i>Smartphones only</i>: Displays <i>only</i> on smartphones.</li> <li>• <i>None</i>: Hides the menu item from the navigation features for any device.</li> </ul> <p><b>Note:</b> The application doesn't determine the actual device type, but uses the viewport size for the Show On option.</p>
<b>Show on Springboard</b>	<p>Turn on to have the icon for the menu link appear on the springboard, which can be accessed by agency staff only.</p> <p><b>Note:</b> Applies only to menu links.</p> <p>For more information on springboards, see <a href="#">Setting Up the Agency Springboard</a>.</p>

Page Elements	Description
<p><b>Show in Page Finder</b></p>	<p>Turn on to have the icon for the menu link appear in the page finder navigation feature.</p> <p><b>Note:</b>                      Applies only to menu links.</p> <p>For more information on the page finder, see <i>Using the Page Finder</i>.</p>
<p><b>Page Contents</b></p>	<p>The edit box appears only for these menu items:</p> <ul style="list-style-type: none"> <li>Anonymous User Landing page</li> <li>Registered User Landing Page</li> <li>Agency Springboard</li> </ul> <p>This edit box enables you to manage content links that appear on a landing page or springboard.</p> <p>Enter a comma-separated list of menu item names.</p> <p>For example, the Anonymous Public Landing Page link points to the Anonymous Landing Page Data folder (PSCHM_GUEST), so in the Page Contents edit box, the following is entered:</p> <p><b>PSCHM_GUEST</b></p> <p>When the Anonymous Landing Page loads, it displays the menu links contained within PSHCM_GUEST folder.</p> <p><b>Note:</b>                      Delivered menu items for landing pages or springboards can refer to a single menu folder containing menu links. The menu folder, in this case, includes all of the links to appear on the landing page or springboard. Or, you can provide a list of menu links.</p>
<p><b>Context Menu</b></p>	<p>The edit box appears only for menu items that display a menu, such as:</p> <ul style="list-style-type: none"> <li>Switch Profile</li> <li>Actions</li> </ul> <p>This edit box enables you to manage content links that appear on a drop-down list for the UI widget.</p> <p>Enter a comma-separated list of menu link names. For example:</p> <p><b>PSCPBL_SETUP_MANAGEACCOUNT, PSCSECUTIL_WIDGET_SIGNIN, PSCNV_HEADER_ORACLE_HELP,</b></p> <p>The menu link names added to the list appear in the list for that page control or widget.</p>

**Note:** Menu links that can group other menu links, such as the I Want To links, have similar edit boxes where you can point to menu items, named Content Link, Guided Process Actions, and so on.

## Configuring Target URL Properties

When you are adding a new link, you specify properties that control the link destination and how the link behaves.

This example illustrates the Target URL settings, which are described in the surrounding text.

### Target URL

\* Location

\* Type

\* Page Name

Page Element	Description
Location	<p>Specify where the target content should display:</p> <ul style="list-style-type: none"> <li><i>Default</i>: The default target location depends on the target type.</li> </ul> <p>For a delivered page, the default location is determined by the target location defined for that page by Oracle development. Selecting, <i>Default</i> as the target location for a delivered page accepts the delivered behavior of that page. Selecting one of the other Location options below, explicitly overrides the delivered behavior.</p> <p><b>Note:</b> Typically, the application loads delivered pages using a partial page refresh, where only the content displayed in the content area is updated, leaving the same header and footer content. However, some pages open in a new window or modal window. Be sure to test the current behavior so you are aware of the default target location.</p> <ul style="list-style-type: none"> <li><i>Replace Window</i>: Replaces the current browser window with the target content, performing a full page refresh.</li> <li><i>Modal Window</i>: Displays the target link within a modal window. The user must interact with the modal window and dismiss it before returning to the main page.</li> </ul> <p><b>Note:</b> Not all sites support pages being displayed in modal windows. In such cases, the modal window is blank. If the target content is not supported for modal windows, select another option. Be sure to test this option prior to implementing it in your production system.</p> <ul style="list-style-type: none"> <li><i>New Window</i>: Displays the target content in a new browser window.</li> </ul>
Type	<ul style="list-style-type: none"> <li><i>Delivered Page</i>: Pages delivered by Oracle in the Oracle Permitting and Licensing services.</li> <li><i>URL</i>: A URL to an external page.</li> </ul>
Hide from public user	Applies only if the target type is URL.

Page Element	Description
	<p>If turned on, the application displays the menu link only to agency staff (users with the following privilege: PSC_ACCESS_AGENCY_SPRING_BOARD_PRIV). Otherwise, the application displays the menu item link to all users.</p> <p><b>Note:</b> This option does not apply or remove security; it only controls if a link is visible to public users or not.</p>
Page Name	If you selected a target type of <i>Delivered Page</i> , select the page to which you want to link.
URL	<p>If adding a URL target type, add the URL here. Enter a fully qualified URL, including the protocol, such as http://, https://, ftp://, and so on.</p> <p>For example:</p> <p>http://google.com</p> <p>https://confluence.bigcity.gov/permit_info.html</p>

## Setting Widget Attributes

Widgets are the user interface constructs the user can view and click, such as the items in the Header Widgets menu folder, the Widget Links folder, and so on. For widgets you can specify custom CSS style classes if needed. You add your CSS using the Free-form styles branding attribute, and then reference it from the Widget Attribute settings.

Depending on the widget and where it is displayed, the system displays one or all of the widget attributes. For example, in the case of the Help widget, by default, you see two widget attributes Style Class and Context Menu Icon. Style Class enables you to apply a style to the overall widget, and because Help appears in the Switch Profile context menu, you can use Context Menu Icon to display the help icon, if desired.

Page Element	Description
Style Class	Specify the style you want to apply to the widget.
Display Mode	<ul style="list-style-type: none"> <li><i>Text and icon</i>: Displays both the label and the icon.</li> <li><i>Icon only</i>: Displays only the icon.</li> </ul>
Icon	Specify style classes to define the widget icon.
Context Menu Icon	Specify the icon you want to appear for the option in the context menu, if desired.

## Using the Page Finder

This topic provides an overview of the navigation feature named page finder, and it describes how to use its features.

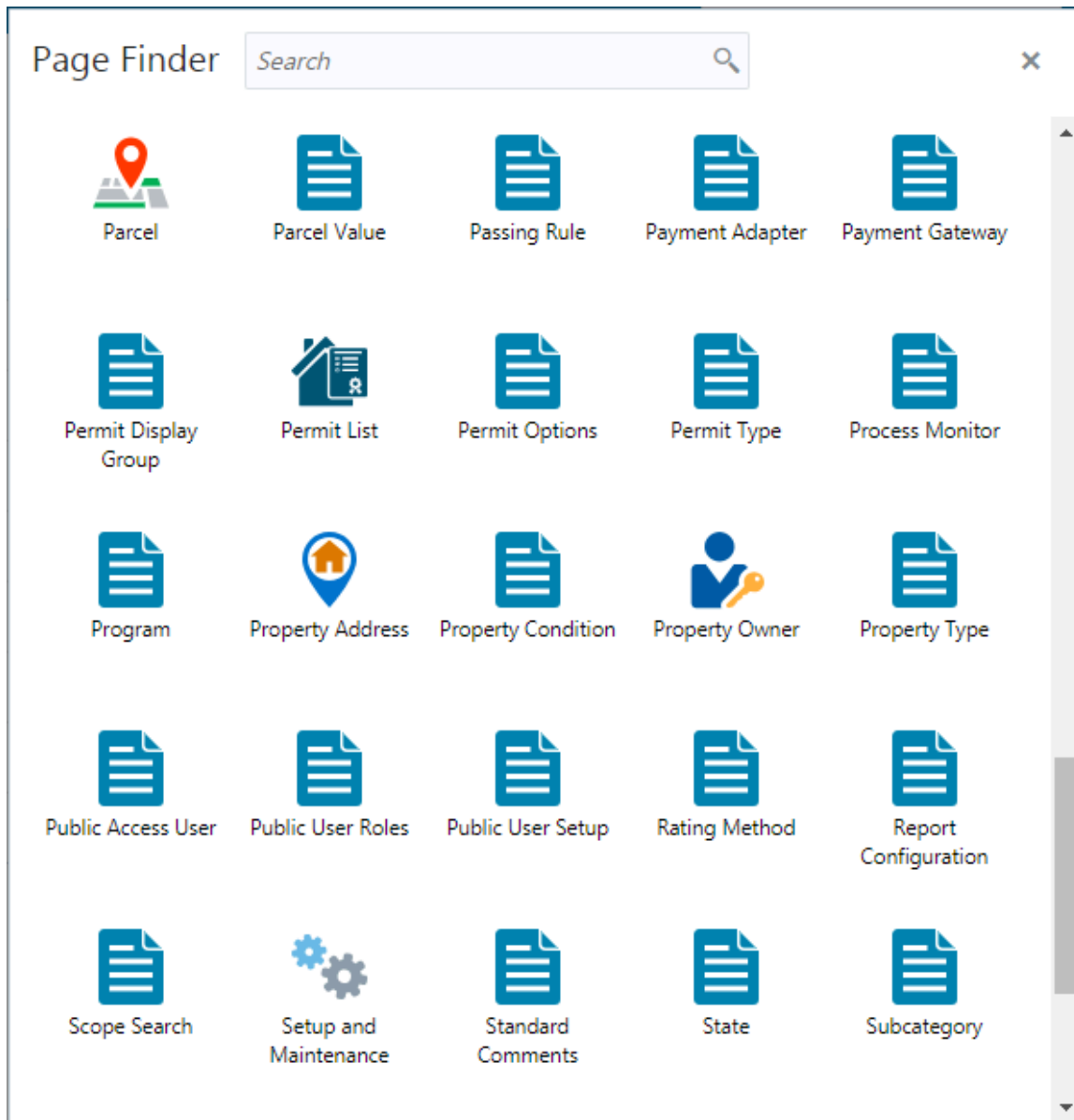
The Page Finder is a navigation feature an agency user accesses by clicking the Page Finder button in the header.



The Page Finder displays icons:

- For all the pages to which a user has access. Users can click the icon to navigate directly to the page.
- In alphabetical order.
- In a “flattened” format, meaning each page link appears on its own — not within the menu folder/menu item hierarchy like you see in the Navigator menu. The Page Finder does not display menu folders.

This example illustrates the Page Finder interface with a description surrounding the image.



**Note:** The system does not display the Page Finder on smartphones (small form factor devices).

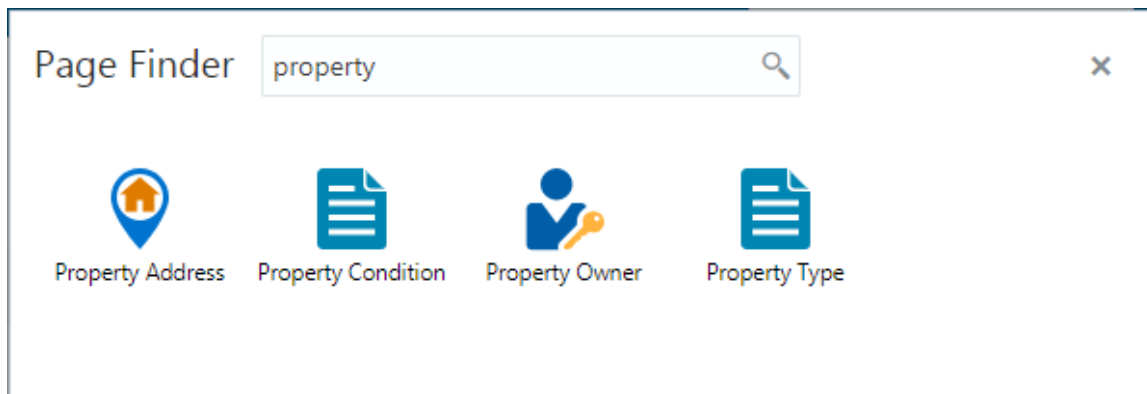
**Note:** The screen size and/or browser window size determines the number of icons in each row, displaying a maximum of five icons across with a minimum of four.

**Note:** The Page Finder is available only for agency users, not for public users.

## Searching within the Page Finder

Depending on the number of pages to which a user has access, the Page Finder may contain numerous icons within it. To find icons in the Page Finder:

- Use the scroll bar on the right-hand side of the Page Finder (when displayed).
- Type the full or partial name of the page into the Search field at the top of the Page Finder to reduce the number of page links displayed.



## Closing the Page Finder

Once opened, you can dismiss the Page Finder by:

- Clicking the Close Page Finder button in the upper-right-hand corner.
- Clicking on an icon.

## Viewing the Menu Structure in the Navigator

This topic describes how the structure in the menu definition is represented in the navigation feature named the Navigator.

The Navigator menu, displays when the user clicks the Navigation button in the global header.

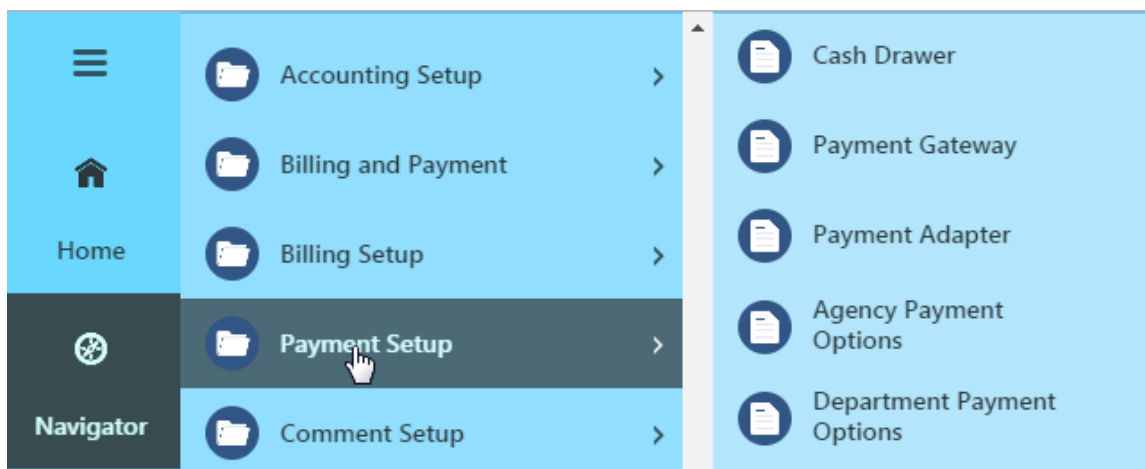
The Navigator menu displays the menu content in the same hierarchy defined for menu folders and menu items in the menu structure displayed in the Configure Menu Structure page.

The following example illustrates menu folders containing menu items in the Configure Menu Structure page with description surrounding the image.



- Product Setup
  - System Settings
  - Common Setup
  - Branding
  - Navigation
  - Agency Staff
  - Accounting Setup
  - Billing Setup
  - Payment Setup
    - Cash Drawer
    - Payment Gateway
    - Payment Adapter
    - Agency Payment Options
    - Department Payment Options

At runtime, the Navigator displays the menu items within the menu folder as defined on the Configure Menu Structure page.










## Configuring Header and Footer Navigation Features

This topic describes how to modify your header to include additional features in the header or footer widgets, which can provide more flexible navigational options for end users.

## Overview of Header and Footer Navigation Features

The global header and footer run along the top of the page and the bottom of the page, respectively. The header is delivered with a set of default navigation widgets, such as the Home button. If needed you can modify delivered widgets.

The header and footer navigation widgets definitions are stored within the navigation framework in the Products menu. Header widgets are stored in the Header Widgets menu folder, and footer widgets are stored in the Footer Widgets folder.

-  **Header Widgets (Hidden)**
  -  Home
  -  User Menu
-  **Footer Widgets (Hidden)**
  -  Copyright
  -  Contact Us
  -  Quick Links

A widget can be a singular button taking the user to a destination, such as the home page or another custom location. Widgets can also be lists of multiple related links that display when clicked. You can add custom attributes to the menu item definition to customize the display of the link.

Link Destination	Description
URL	Targets an outside URL, such as <a href="http://oracle.com">http://oracle.com</a> or <a href="http://facebook.com">http://facebook.com</a> . Rendered as a button or a link in a related link list.
Delivered page	Specify the name for the page as it appears in the menu item definition on the Configure Menu Structure page.

In the current release, you cannot create new, custom widgets, but you can modify existing widgets. You can insert links into an existing widget, and you can modify other attributes, such as the label, on what devices it displays, and so on. You can modify these attributes on the Configure Menu Structure page.

For more information on the Configure Menu Structure page, see [Configuring Menu Structure](#).

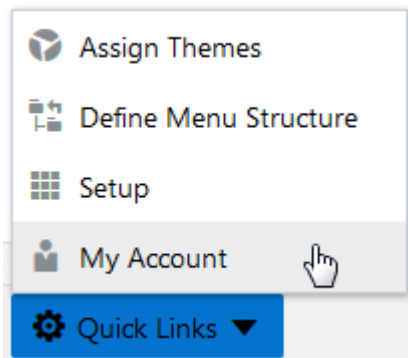
## Inserting Links into an Existing Related Links Widget

1. Select Navigation > Configure Menu Structure.
2. On the Configure Menu Structure page, select *Products* from the **Menu** drop-down list.
3. Click **Open Menu**.
4. Locate the Header Widgets folder or Footer Widgets folder, depending if you are modifying the header or the footer navigation widgets.
5. Select the menu item you want to modify in either the Header Widgets folder or the Footer Widgets folder.  
For example, select the Switch Profile menu item in the Header Widgets folder.
6. Click **Edit**.

7. In the Context Menu attribute, add a comma, and enter the name content reference associated with link you want to add to the current link list.

For example, to add the My Account link, add the content reference name PSC\_MY\_ACCOUNT.

8. Save your changes.
9. Confirm the link appears in the related link list.



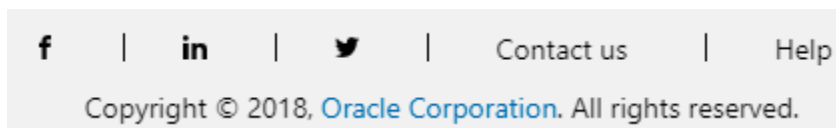
## Creating Free-Form Footers

This topic describes how you can incorporate custom HTML to define your own footer that will display instead of the fixed-form footer.

### Footer Configuration Overview

By default, the Oracle Permitting and Licensing application does not deliver a footer. Oracle Permitting and Licensing does provide a fixed-form global footer, populated with various links and widgets that you can implement by applying a solution package.

This is an example of a fixed-form footer similar to that provided by a solution package, displaying links to Linked In, Facebook, Twitter, Help, plus copyright text.



**Note:** The copyright text, footer text color, and footer background color is controlled by branding attributes. See [Configuring Theme Attributes](#).

You can also insert your own items into the footer area by adding menu links to the Footer Widgets menu folder, which is delivered empty. For more information on footers, see [Configuring Header and Footer Navigation Features](#), and for more information on adding menu links, see [Configuring Menu Structure](#).

If your organization prefers to use its own footer design, you can add free-form footers with the Configure Footers page. You can create these footer definitions:

- Default: Displays for the default application, accessed through the browser.

- Mobile: Displays for the mobile application, such as Oracle Inspector.

**Note:** Incorporating a free-form footer into your Oracle Permitting and Licensing implementation requires expertise in editing HTML manually, plus general knowledge of Cascading Style Sheets (CSS). Most organizations already have footers defined for their agency website, which you can incorporate into your Oracle Permitting and Licensing implementation, by copying the correct HTML, style references, and image references.

## Creating a Free-Form Footer

To create a free-form footer:

1. Select **Navigation > Footer Configurations**.
2. On the Configure Footers page click **Add**.

This launches the Footer Details page.

3. For **Application**, select how the user accesses the page where the footer will be displayed, as in through the browser or by a mobile application. Options are:
  - *Default*: Displays for any user accessing the website from a browser, which could be running on a desktop, laptop, or mobile device. The user enters a URL or clicks a link to access the site.
  - *Mobile Inspector*: Displays for any user accessing the website using the Oracle Inspector mobile application installed on a mobile device.
  - *Mobile Code Officer*: Displays for any user accessing the website using the Code Officer mobile application installed on a mobile device.
  - *Code Enforcement*: Displays for any user accessing the Code Enforcement offering.

**Note:** You can define only one footer for each application.

4. For **Feature Area**, select the main feature to which the footer applies, such as Permits, Business Licenses, and so on.
5. For **Description**, enter text to describe to other members of the implementation team the purpose of the footer definition.
6. In the **Content** edit box, add your footer HTML.

Your HTML needs to include all the required HTML elements with the proper links to images, CSS styles, and so on. Any content you enter will be displayed as is inside the <footer> element at the bottom of the page. It is assumed you already have the required HTML and styles in your agency website that you can copy into the Content edit box.

**Note:** If you add any JavaScript to the footer content in addition to HTML and CSS, the Oracle Permitting and Licensing application will run the JavaScript. Make sure you have addressed any JavaScript security issues related to any content you enter. Using any of the delivered CSS or JavaScript APIs is not supported.

7. After adding your HTML content, tab out of the **Content** field and click Preview to display a preview of your footer.
8. Click **Save and Close**.

**Note:** As soon as you click Save and Close, your footer becomes the new footer for the current site. Make sure to use the preview feature as much as possible while you add the HTML for your footer.

## Example: Free-Form Footer Example

This example illustrates how you use the Footer Details page to select where your free-form footer appears, add custom HTML, and preview the footer.

Footer Details Cancel Save and Close

\* Application

Feature Area

Show For

\* Description

### Content

```
<center>
<p>Our User-Defined Footer</p>
<p>Contact Information: <a href="mailto:someone@example.com"
style="color:white;">someone@example.com</p>
<center>
```

### Preview

Our User-Defined Footer

Contact Information: someone@example.com

## Back Button Behavior

This topic describes how to use and what to expect when using the back button in Public Sector Cloud services.

Public Sector Cloud applications display a Go Back button (back button) in the global header just to the left of the Global Navigation button. The following list describes the characteristics and behavior of the Go Back button.

The Go Back button:

- Displays on all form factors, from small (smartphone) to large (desktop computer).

- Can be identified by the chevron image, pointing left, just to the left of the Global Navigation button.
- When displayed on a small form factor (smartphone), the system does not display the Global Navigation button, when the back button is displayed.
- Displays on the header for all application pages, but does not on the springboard or landing page (the first page displayed when accessing the system).
- Stores history for end user page-to-page navigation by means of the provided navigation devices (navigator menu, springboard, search, and so on).
- Does not store history for in-page navigation (except in certain cases where delivered pages have been specifically designed to track in-page history). For example, the system does not maintain history of switching between various tabs on a single page or drilling into a detail pane from a primary list in a single page, and so on.

## Mobile Applications Navigation Considerations

This topic discusses topics related to implementing navigation for the Public Sector Cloud mobile application and how you can plan for future mobile applications as they are released.

Public Sector Cloud provides a mobile application for agency staff to download and install on their mobile devices. The mobile application is not intended to be used by public users. While the Public Sector Cloud mobile application is mainly intended for smartphones, you can download the app to other mobile devices, such as tablets.

You download the Public Sector Cloud mobile application from the App Store for iOS devices and Google Play for Android devices. Mobile devices must download the Public Sector Cloud mobile app and install it on the mobile device in order to access the native mobile app menu. Accessing the main Public Sector service using a browser does not display the mobile app, but only the main Public Sector service rendered on the mobile device's browser, not necessarily optimized for the mobile device.

Initially, the Public Sector Cloud mobile application consists of the Mobile Inspections menu items, but as additional functionality becomes available, such as Code Enforcement, more menu items will be accessible from the downloaded mobile app.

Each mobile application has its own entry point into the system, and accesses a unique menu definition, specific to that app. The menu definition and the menu items for a mobile application are defined internally by Public Sector Cloud development teams. The menu items displayed in the mobile application may be a subset of the menu items displayed in the main Public Sector service, and some menu items may display only in the mobile app, not in the main Public Sector menu structure.

If you intend to modify menu items displayed on a mobile application menu, you need to make sure you are updating the specific menu for that mobile application menu, such as `MOBILE_INSPECTIONS` or `MOBILE_CODE_ENFORCEMENT`.

As far as security is concerned, administrators must explicitly grant access to the mobile app menu to the necessary mobile user roles.

The navigation items in that menu can then be further filtered by user permissions. You can also apply specific branding themes to the mobile application if you want it to appear differently than the main Public Sector Cloud service.

## Configuring the Actions Menu

This topic provides an overview and describes how to configure the Actions menu for a small device, such as a smartphone.

The system displays the Actions menu only on the small form factor, such as smartphones. The Actions menu appears on the right side of the global header displaying three-vertical dots. Selected buttons, such as the shopping cart button, remain displayed on the global header for the small form factor device. Other buttons, such as the Home button display on the Actions menu for the small form factor device, along with the Manage Account and Sign Out button. Moving the buttons to the Action menu saves space on the global header.

If you add any custom navigation widgets to the global header, it is recommended to configure the Actions menu to display the custom navigation widgets on the small form factor device. You will need to create one header navigation widget for the small form factor and one for the larger form factors (tablets and larger).

To configure the Actions menu:

1. Select Navigation, Define Menu Structure, and open the Products menu.
2. Create a menu item in the Header Widgets (Hidden) folder for the navigation header widget that the system will display for tablets and larger devices, setting the Display property on the General tab to *Medium and Over Only*.
3. For the header navigation widget for the small form factor devices (smartphones), create a menu item in the Widget Links (Hidden) folder, setting the Display property on the General tab to *Small Form Factor Only*.

This menu item for the Actions menu should open the full transaction page, not a pop-up page (like the Notifications button does when hovering).

4. Modify the Actions menu item in the Header Widgets (Hidden) folder and add the small form factor menu item name to the RELATED\_LINKS attribute.

**Note:** There is an Actions menu item in the Products menu and the Mobile menu. The Actions menu item in the Products menu applies to small form factor devices accessing the default website using a smartphone, rather than a laptop or desktop. The Actions menu item in the Mobile menu applies specifically to devices accessing the site using the downloaded mobile app, such as Oracle Inspector, installed on a mobile device.

## Configuring Recent Activity

This topic describes how to configure and use the recent activity feature enabling agency users to navigate quickly between transactions.

Agency users can use the Recent Activity menu to quickly navigate between the transactions they have accessed recently to save them from having to navigate to the transactions manually. For example, if a permit technician has accessed multiple permits and plan reviews recently, they can use the Recent Activity menu to immediately navigate between all of those transactions that appear on the Recent Activity menu.

### Configuring the Recent Activity Menu

You can specify the number of items that appear in the Recent Activity menu.

To configure the number of items in the Recent Activity menu:

1. Select **Navigator > Navigation > Recent Activity Configuration**
2. On the Recent Activity Configuration page, use the **Global Recent Items** to set the number of items you want to display in the Recent Activity menu.

The default is 15. Entering 0, disables the display of recently accessed transactions.

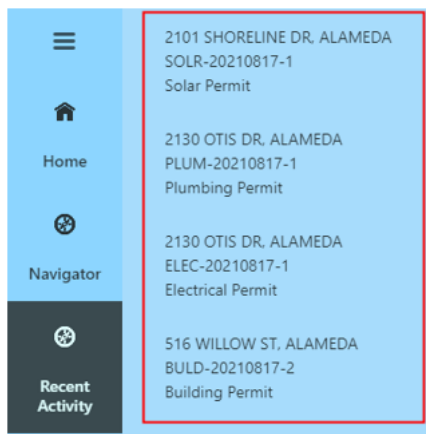
3. Click **Save**.

To test your changes you need to sign out and sign in.

## Navigating with the Recent Activity Menu

To navigate with the Recent Activity menu:

1. Select **Navigator > Recent Activity**.



2. Select the Recent Activity menu item you need to access.



# 3 Branding

## Branding Your Offering

This topic describes how to manage branding themes and set theme attributes so you can create a user interface and experience tailored to your agency.

You can apply the unique branding theme for your organization to your Oracle Permitting and Licensing offering. A branding theme defines the collection of a set of branding attributes.

Oracle provides a default theme for your initial implementation, but you can create your own themes to match your organizations color choices and labeling.

Initially, Oracle applies a default branding theme with a set of default theme attributes and attribute values. If you apply a custom default system branding theme, any theme attribute you include in your default branding theme overrides the Oracle default for that theme attribute.

You cannot modify the delivered branding theme. To make changes, you need to create your own branding theme, and add the attributes you wish to modify.

After creating your branding theme, you then assign your branding theme to your implementation. The attributes you add to your own branding theme override the equivalent attributes in the default branding theme once you assign your own theme.

## Branding Redwood Applications

As Oracle Permitting and Licensing begins to release updated applications as part of the Redwood experience, there are some additional considerations to keep in mind when applying branding themes and attributes to the new UI elements. Currently, only a limited number of attributes are supported for the Redwood elements, built using Oracle Visual Builder Cloud Service (VBCS).

The following table shows the attributes supported for the themes you apply to the currently available Redwood applications..

Release	Theme Attributes	Applications
24A	<ul style="list-style-type: none"> <li>• Logo</li> <li>• Header background color</li> </ul> <p><b>Note:</b> You add the Logo image using the Oracle Fusion Appearance UI tool the same as previous releases.</p>	<ul style="list-style-type: none"> <li>• Account Management</li> <li>• Code Enforcement UI</li> <li>• Inspections UI</li> </ul>

For example, if you wanted to apply a new header background color to the Redwood Account Management interface, create a theme selecting the *Header background color* attribute, assign it a color value, and then use the Assign Themes page to select *Account Management* as the **Application** and your theme as the **Default Theme**.

**Note:** Currently, the Redwood applications don't display icons on the right side of the header.

## Managing Themes

This topic describes how to access, create, modify, and delete branding themes.

This section describes the tasks related to managing themes.

### Accessing Themes

To access theme definitions, select **Branding > Themes**.

From the Manage Themes page you create, modify, and delete theme definitions.

### Creating a Theme

You can create multiple themes as needed for your implementation. Themes can be assigned to the system, application, and role level.

1. On the Manage Themes page, click the **Add** button.
2. On the Theme Details page, modify these attributes:

Page Element	Description
<b>Theme ID</b>	System identification for the theme. Use upper case letters, numbers, or underscores only. The Theme ID has a 30-character limit.
<b>Label</b>	The functional display label that you see when selecting a theme.
<b>Description</b>	Provides additional information to describe the purpose of the theme to system administrators implementing your organization's branding.

3. Click **Save**.

### Modifying a Theme

1. On the Manage Themes page, click on the row of the existing theme you want to modify.
2. On the Theme Details page you modify:
  - o Label
  - o Description
  - o Branding Images
  - o Attributes
3. Click **Save**.

## Deleting Themes

You delete themes from the Manage Themes page.

1. On the Manage Themes page, click the Edit button to put the grid in edit mode.
2. Select the row(s) of the theme(s) you want to delete.

Notice the row becomes selected.

**Note:** To select all rows, click the check box in the upper-left-hand corner of the themes grid.

3. Click the **Delete** button.
4. Click **OK** to confirm you want to delete the selected items.
5. Click the **Edit** button to exit edit mode.

## Managing Theme Attributes

This topic describes the tasks related to adding and modifying theme attributes, which define the appearance and branding of your Oracle Permitting and Licensing service. A theme can contain one or more configured theme attributes.

### Working with Theme Attributes

A branding theme represents the collection of elements giving your application your customized user experience. Theme attributes represent the particular element that you want to customize within your branding theme, such as the logo image, the application name, or the header font color.

This example illustrates the Theme Details page.

Theme Details

\* Theme Name

\* Label

\* Description

Attribute List

---

Upload Branding Images

Name	Value	
Application label	City of Boston	>
Header background color	#A9CEE8	>

A theme can contain one more theme attributes. A theme attribute is not a standalone definition; it must be associated with a theme.

Each theme attribute is comprised of these properties:

- Theme Name: The theme to which you add the theme attribute.
- Name: A predefined set of attributes, selected from a drop-down list.
- Value: You customized value (label text, color, and so on).

## Adding a Theme Attribute

You can add theme attributes when creating or modifying themes.

1. Select **Branding > Themes**.
2. In the themes grid, click the theme to which you want to add an attribute.
3. On the Theme Details page, click the **Add** button in the Attribute List grid.
4. On the Theme Attribute Details page, select the attribute you want to add from the Name drop-down list.

For descriptions of each attribute type, see [Configuring Theme Attributes](#).

For example:

This example illustrates the Theme Attribute Details page.

The screenshot shows a form titled "Theme Attribute Details". It contains three required fields, each marked with an asterisk (\*):

- \* Theme Name**: BOSTON
- \* Name**: Application label
- Value**: City of Boston

At the bottom right of the form, there are three buttons: "Cancel", "Delete", and "Save".

5. In the Value field for the theme attribute, enter the required value for that attribute.

For example, if you selected *Application label*, enter your custom label text, or if you selected *Header background color*, enter the color, a HEX value, or an RGB value.

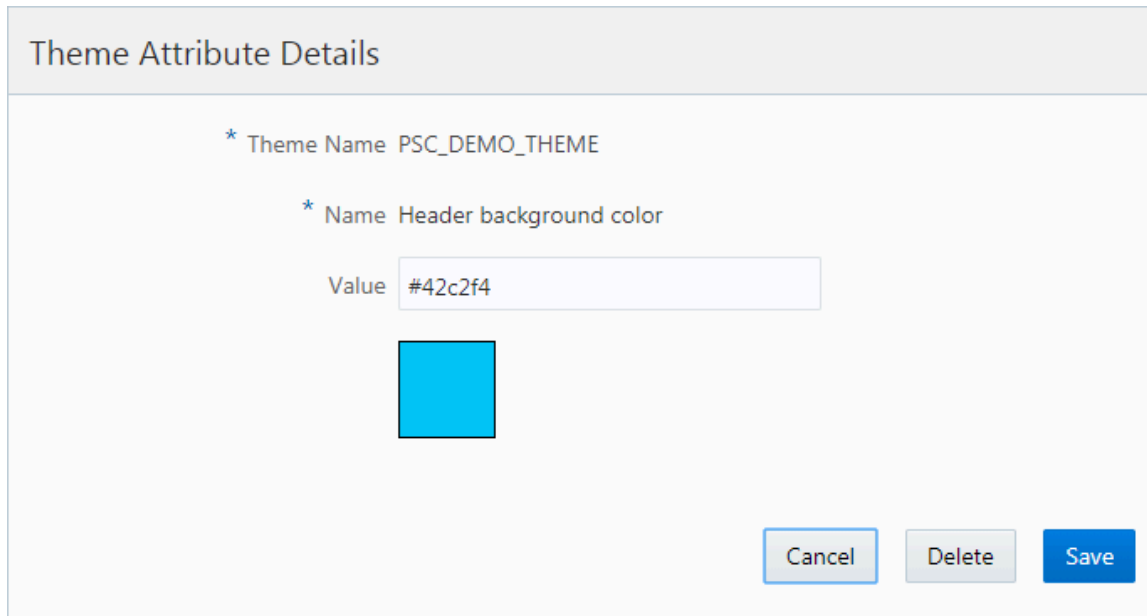
6. Click **Save**.

## Previewing a Theme Attribute

For color attributes, the system displays a preview of the color value you've provided.

This example illustrates previewing a color attribute:

This example illustrates the preview feature for color theme attributes where below the Value field the application displays a square showing the specified color.



The screenshot shows a form titled "Theme Attribute Details". It contains the following fields and elements:

- A field for "Theme Name" with the value "PSC\_DEMO\_THEME".
- A field for "Name" with the value "Header background color".
- A field for "Value" with the value "#42c2f4".
- A small blue square below the "Value" field, representing the color preview.
- Three buttons at the bottom right: "Cancel", "Delete", and "Save".

## Deleting a Theme Attribute

You can delete theme attributes when modifying themes or when modifying a theme attribute.

1. Select **Branding > Themes**.
2. Open the theme from which you want to remove attributes.
3. On the Theme Details page, click the **Edit** button in the Attribute List grid to put the grid into edit mode.
4. Select the row(s) of the theme attribute(s) you want to delete.

Notice the row becomes selected.

**Note:** To select all rows, click the check box in the upper-left-hand corner of the theme attributes grid.

5. Click **Delete**.
6. Click **OK** to confirm deleting the selected item(s).
7. Click the **Edit** button to exit edit mode.

**Note:** You can also delete attributes from the Theme Attribute Details page open when you have a single attribute open.

## Configuring Theme Attributes

This topic lists and describes all of the theme attributes you can add to a theme to define the appearance and behavior of your Public Sector Cloud service.

## Working with Theme Attributes

The following table contains descriptions of the theme attributes you can add and configure to adjust the display and user experience of the service.

Theme Attribute	Description
<b>Favorite icon</b>	<p>Use to add a “favicon” image for your site. The favorite icon appears in the browser tab, and it also appears as the icon in the favorites list if a user bookmarks the page.</p> <p>Use https:// to reference a hosted image or use base64 encoded images.</p> <p>The favorite icon must be:</p> <ul style="list-style-type: none"> <li>• ICO image type</li> <li>• 16x16 pixels or 32x32 pixels</li> </ul> <p><b>Note:</b> Not all browsers support the favorite icon, and not all browsers support base64 encoded icons.</p>
<b>Mobile device home screen icon</b>	<p>Use to add a home screen image for a browser page from this cloud offering if a user pins the page to the home screen while using a mobile device.</p> <p>Use https:// to reference a hosted image or use base64 encoded images.</p>
<b>Application Label</b>	<p>Enter the title for your application.</p> <p>For example:</p> <p><i>City of Carlsbad Permits Center</i></p> <p>By default, the application label only appears as the text on the browser tab.</p> <p>Select the <i>Show application logo in header</i> attribute to have the application logo appear also in the application header.</p>
<b>Show application label in header</b>	<p>Turn on the Value switch to set the application label to appear in the application header.</p> <p><b>Note:</b> When displayed, the application label appears to the right of the application logo, and on a smartphone the application label appears in the center of the header.</p> <p><b>Note:</b> You can achieve the same by overriding the following CSS style: <code>pscts-theme-header-text-app-label</code>. See the following section covering free-form styles for more information.</p>
<b>Copyright text</b>	<p>Enter text displayed in the footer for copyright purposes.</p>
<b>Page background color</b>	<p>Specify the main color for the page. For example:</p>

Theme Attribute	Description
	#111
<b>Header background image</b>	Use to include a background image for the header. Use https:// to reference a hosted image or use base64 encoded images.
<b>Header background color</b>	Specify the main color for the header color. For example: <b>#a0a0a0</b>
<b>Header text color</b>	Specify the color of the header text, as well as the color of the Application Navigation button and the Search button.
<b>Header icon color</b>	Specify the color of the header icons, such as Home, Page Finder, Alerts, and so on.
<b>Content area border color</b>	Specify the main color for the border of the content area. For example: <b>#eeeeee</b>
<b>Footer background color</b>	Specify the main color for the footer color. For example: <b>#a0a0a0</b>
<b>Footer background image</b>	Use to include a background image for the footer. Use https:// to reference a hosted image or use base64 encoded images.
<b>Footer text color</b>	Enter the color for the text appearing in the footer.
<b>Welcome banner background color</b>	Specify the background color you want to set for the welcome banner on the public landing pages.
<b>Welcome banner text</b>	Enter the text you want to appear in the welcome banner on the public landing pages.
<b>Welcome banner text color</b>	Enter the color of the text you want to appear in the welcome banner on the public landing pages.
<b>Digital assistant launcher icon</b>	Enter the URL pointing to the image you want to appear on the agency springboard or the user landing page for the Digital Assistant. You click this image to launch the Digital Assistant.  <b>Note:</b> The Digital Assistant is a chatbot feature.  For more information on the Digital Assistant, see <a href="#">Configuring the Digital Assistant Parameters</a> .  Use https:// to reference a hosted image or use base64 encoded images.
<b>Digital assistant logo</b>	Enter the URL pointing to the image you want to appear on the left side of the Digital Assistant banner that the user sees after launching the Digital Assistant.

Theme Attribute	Description
	<p><b>Note:</b> The Digital Assistant is a chatbot feature.</p> <p>For more information on the Digital Assistant, see <a href="#">.Configuring the Digital Assistant Parameters</a></p> <p>Use https:// to reference a hosted image or use base64 encoded images.</p>
<b>Theme style sheet</b>	Specify the stylesheet containing the style classes you reference in the theme properties on this page.
<b>Free-form styles</b>	<p>Add any additional Cascading Style Sheet (CSS) style class definitions to further brand your implementation if needed. The styles you add can be used to override styles applied to delivered items not associated with a specific branding attribute, such as landing page tiles.</p> <p>See the following section for descriptions of the elements to which you can apply free-form CSS.</p>

**Note:** You do not select branding images using the Theme Attribute Details page. You use the Oracle Fusion Applications Appearance tool to upload branding images.

For more information on branding images, see [Applying Branding Images](#).

## Modifying Delivered Style Classes with Freeform CSS Styles

Some elements in the interface are not represented by a theme attribute that you can modify using the Theme Attribute Details page. If needed you can add your own CSS to the Freeform Style theme attribute to override the CSS style applied by default. The following table lists UI elements and their associated style class that you can override with your own CSS.

UI Element	Style Class Override Example
Background color of the Anonymous User Landing page	<pre>.pscts-theme-page .PSCHM_GUEST_LINK{ background-color: silver; }</pre>
Background color of the Search box on the Anonymous User Landing page	<pre>.pscts-theme-page .PSCHM_SEARCH{ background-color: gray; }</pre>
Background color of the tiles on: <ul style="list-style-type: none"> <li>Anonymous User Landing page</li> <li>Registered User Landing page</li> </ul>	<pre>.pscts-theme-page .psc-citizen-svg{ background-color: green; }</pre>
Background color of Registered User Landing page	<pre>.pscts-theme-page .PSCHM_PUBLIC_LINK{ background-color: #00FFFF; }</pre>
Background color of Agency Springboard	<pre>.pscts-theme-page .PSC_AGENCY_HOME{ background-color: #00FFFF; }</pre>



UI Element	Style Class Override Example
	} }
Quick Actions (I Want To) drop-down list on the Agency Springboard	<pre>.pscts-theme-page .psc-home-two-column{ background-color: silver; }</pre>
Application label to appear in global header	<pre>.pscts-theme-page .pscts-theme-header-text-app-label { white-space: nowrap; display: block; }</pre>

## Applying Branding Images

This topic describes how to include images in your branding configuration by using the Fusion Applications Appearance page to upload and store branding images, such as logo, cover image, and background image, or using the Oracle Permitting and Licensing theme administration pages to reference other images.

### Understanding Branding Images

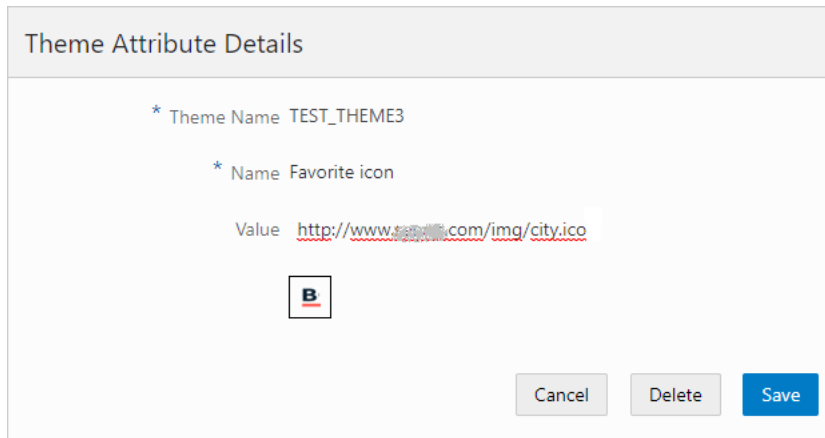
To include images in your branding theme configuration, you use the Fusion Applications Appearance UI tool or modify delivered theme attributes, depending on the image type. For example, for your site logo, you use the Appearance UI tool, and for the favorite icon, you include the Favorite icon attribute in your theme and reference the desired image. The following table provides a list of the images you can include and where those images are managed.

Administration Tool	Image
Appearance UI	<ul style="list-style-type: none"> <li>• Logo</li> <li>• Background image</li> <li>• Cover image</li> </ul>
Oracle Permitting and Licensing: Theme Details page <b>Branding &gt; Themes</b>	<ul style="list-style-type: none"> <li>• Favorite icon</li> <li>• Mobile device home screen icon</li> <li>• Header background image</li> <li>• Footer background image</li> <li>• Digital assistant launcher icon</li> <li>• Digital assistant logo</li> </ul>

### Using Theme Attributes to Include Branding Images

When using the provided theme attributes to apply images to your branding theme, you reference the image using HTTPS, or you provide a base64 encoded image.

If you have your images stored in a content delivery network (CDN), for example, you can reference the image using an HTTPS reference, such as `https://ursrvr.com/img/image.ico`.

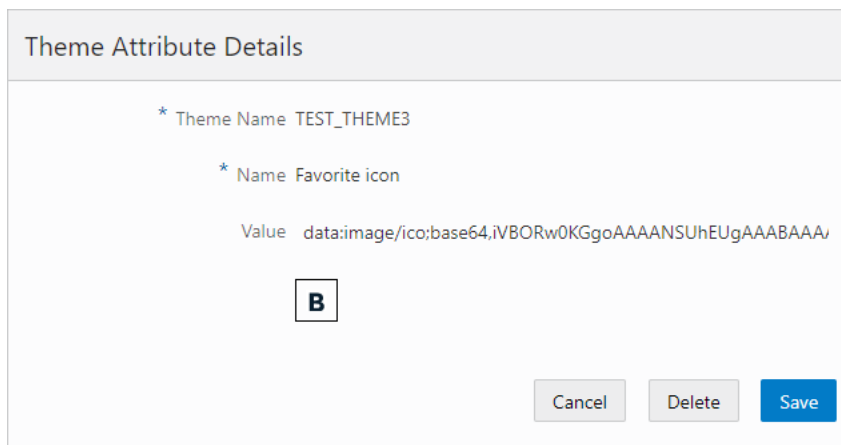


The screenshot shows a dialog box titled "Theme Attribute Details". It contains the following fields:

- \* Theme Name: TEST\_THEME3
- \* Name: Favorite icon
- Value: <http://www.ursrvr.com/img/city.ico>

Below the value field is a small square icon containing the letter "B". At the bottom right of the dialog are three buttons: "Cancel", "Delete", and "Save".

You can also provide a base64–encoded image using a DATA reference, such as `data:image/ico;base64,<encoded image>`.



The screenshot shows a dialog box titled "Theme Attribute Details". It contains the following fields:

- \* Theme Name: TEST\_THEME3
- \* Name: Favorite icon
- Value: `data:image/ico;base64,iVBORw0KGgoAAAANSUHEUgAAABAAA`

Below the value field is a small square icon containing the letter "B". At the bottom right of the dialog are three buttons: "Cancel", "Delete", and "Save".

**Note:** When using the HTTPS references or base64–encoded images, the images are not cached.

## Using the Fusion Application Appearance UI Tool to Upload and Store Images

You use the Oracle Fusion Application Appearance page to upload and store the branding images that you will use for your Public Sector Cloud services. The Public Sector Cloud service, retrieves the uploaded images from the Appearance page at runtime. No other branding attributes, other than the specific branding images discussed in this topic, are retrieved from the Appearance page.

This example illustrates the images you can upload using the Fusion Applications Appearance page.

Themes **CHICAGO** ▼

General

\* Logo  CityLogo.jpg

Background Image  /images/bkgd\_watermarkcloud.png ▼

Repeat Image

Background Color   ▼

Global Region Background Color   ▼

Global Text and Icon Color   ▼

Cover Image  CitySkyline.jpg

Panel Style  ▼

Image	Description
Logo	<p>Unique logo for your municipality, which appears in the top left of the header for large form factor devices, such as desktop computers and laptop computers.</p> <p><b>Note:</b> The logo does not appear in the header for small form factor devices, such as smartphones.</p> <p><b>Note:</b> A logo image should not exceed a height of 50 px or a width of 200 px.</p>
Background Image	<p>Defines the background color of the content area of selected pages in Oracle Permitting and Licensing services.</p> <p><b>Note:</b> For the current release, only the Apply for Permit page uses the background image.</p>
Cover Image	<p>On a homepage, the cover image spans the page from side-to-side, just below the header, as a banner image. Typically, this image depicts scenic views of the municipality, such as the skyline, an iconic neighborhood, and so on.</p> <p><b>Note:</b> The cover image should be 200 px in height. Images exceeding 200 px in height will not display the full image, while images under 200 px in height will display empty space (black) in the area between the current image height and 200 px.</p>

Image	Description
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When using the Appearance page to upload images for your Public Sector Cloud service, make sure to keep these items in mind:

- The Appearance page is used only for uploading the logo, background image, and the cover image.
- No other branding attributes in the Appearance page are referenced by Public Sector Cloud.
- To create or modify a theme in the Appearance page requires you to first create a sandbox.
- The name of the theme to which you add the Public Sector Cloud branding images in the Appearance page, must exactly match the name of the corresponding theme name in Public Sector Cloud. For example, if your theme in Public Sector Cloud is CHICAGO, then the theme to which you add images to in the Appearance page must also be CHICAGO, using the same spelling and case.
- You do not need to set the theme as active by applying the theme from the Appearance page. However, you need to publish the sandbox containing the new themes or theme updates, from the Appearance page in order to make the theme or theme updates available to your Oracle Permitting and Licensing service.
- If you leave the sandbox unpublished and open using the same user ID used to create intake forms in the Intake Form Designer, you may experience issues saving data in the Intake Form Designer.

## Accessing the Appearance Page from Public Sector Cloud

To access the Appearance page from your Oracle Permitting and Licensing service:

1. Select **Branding > Themes**.
2. On the Manage Themes page, open the theme for which you want to view or add branding images.
3. On the Theme Details page, click the Upload Branding Images link.

This takes you directly to the Themes tab in the Appearance configuration tool.

To access the Appearance page from within Fusion Applications:

1. Click the Navigator button in the global header.
2. Select Appearance, under Configuration.

## Activating a Sandbox

1. On the Appearance page on the Themes tab, click the Go to the Manage Sandboxes Page link.
2. On the Sandboxes page, click **Create Sandbox**.
3. On the Create Sandbox page, enter a Name and Description, and select Appearance as the tool.
4. Click **Create and Enter**.
5. After activating a sandbox, select Navigator and select Appearance to return to the Appearance page.

**Note:** Each time you make a new change to a theme, you must create a new sandbox.

**Note:** Do not create a sandbox with a user ID that would also be used to create transaction types, such as permits or planning applications. A user ID can only be in one sandbox at a time. Do not share the same ID for multiple development or configuration tasks requiring sandboxes.

## Creating a Theme

The theme you use in the Appearance page to store your Public Sector Cloud branding images must match exactly the name of the theme defined in Public Sector Cloud.

To create a theme:

1. After activating the sandbox, return to the Appearance UI and select a theme to clone by clicking the drop-down list next to the Themes page heading.

Make sure to confirm the theme you select to clone contains all of the image types you can upload, which are:

- o Logo
- o Background Image
- o Cover Image

For example, the *Default* theme does not contain all of these image types so don't select it to clone.

2. Click Actions, Save As.
3. On the Save As dialog box, deselect the Apply this theme check box, and enter the name of the corresponding Public Sector Cloud theme that will use the graphics you will be uploading with the Appearance page.

**Note:** The theme name must be exactly the same as the theme name defined within the Public Sector Cloud service Manage Themes page, in both case and spelling.

**Note:** You must not apply the theme defined in the Fusion Appearance page. Public Sector Cloud services only use the Appearance page to upload and store images for internal reference at runtime. If you apply the theme from the Appearance page, that theme will become the active theme used by the Fusion applications after you publish the sandbox. The theme storing the branding images just needs to exist within the Fusion theme collection; it does not need to be applied in order for the Public Sector Cloud service to access the image attributes.

## Uploading Images

To upload branding images:

1. In the General section of the Appearance page, modify one or all of these image types:
  - o Logo
  - o Background Image
  - o Cover Image
2. When adding an image, select one of these options:
  - o File: Browse and select a file from your local computer.
  - o Predefined: Select a file from the list of predefined images delivered by Oracle.
  - o URL: Enter a full URL for the logo or the watermark.

## Publish Your Changes

Items in a sandbox can't be accessed or referenced at runtime until you publish the sandbox.

To publish your changes:

1. When you have uploaded the desired images, click the sandbox banner at the top of the browser window.
2. On the Sandbox Details page, review the list of changes, and click Publish.
3. Return to your Public Sector Cloud service, and review your changes.

## Assigning Themes

This topic describes how to assign branding themes at various levels, such as system, application, and by role.

The offering is delivered with a default branding theme that applies to all levels of the application. If you need to apply different branding attributes, you create your own themes which incorporate your modified theme attributes. After defining the themes to be used in your system, you then need to assign themes. The themes you provide override the default theme attributes where specified. Where no user-defined theme or user-defined theme attribute exist, the attributes defined in the default theme prevail.

You can assign themes at these levels:

Theme Level	Description
System	<p>Applies system-wide. If you do not specify an application-level theme, the interface displays only the attributes of the system theme for all applications and roles. This is typically the <i>Oracle Default Theme</i>.</p> <p>A system-wide theme is required.</p>
Application	<p>Applies only to a specific application menu, such as Default or Mobile. Default applies to the typical interface accessed using the browser, while Mobile refers to mobile applications, such as Oracle Inspector.</p> <p>Application-level themes are optional. A system can have multiple application themes assigned as needed.</p>
Role	<p>Extends the application-level theme assignment to apply to specific user roles.</p> <p>Using role-based themes you can provide different experiences for public users and your agency staff, for example.</p> <p>Role-based themes are optional. An application-level theme can have multiple role-level themes assigned as needed.</p>

The following sections describe the options for assigning themes at each level.

**Note:** During development and testing, make sure to refresh your browser for the new theme settings

**Note:** When you assign a custom theme, the theme attributes that you've added override the delivered Oracle defaults for that theme attribute. Otherwise, the system displays Oracle default theme attributes.

## Viewing System-Level Themes

1. Select **Branding > Assign Themes**.
2. On the Assign Themes page, note the Application Default Theme field value.  
This is the system-wide default theme, such as *Oracle Default Theme*.

## Assigning Application-Level Themes

1. Select **Branding > Assign Themes**.
2. On the Assign Themes page, click **Add** under Theme Assignments.
3. On the Theme Assignment Details page, specify these items:

Page Element	Description
<b>Application</b>	Select the application menu. <ul style="list-style-type: none"> <li>○ <i>Default</i>: Use to apply to the general application (not the specific mobile applications).</li> <li>○ <i>Mobile Inspector</i>: Use to apply a theme to the Oracle Inspector mobile application.</li> <li>○ Mobile Code Officer:</li> </ul>
<b>Description</b>	Enter a description of the theme assignment.
<b>Default Theme</b>	Select the branding theme to apply to this application.

4. Click **Save and Close**.

## Assign Role-Based Themes

You can define different themes for various user roles in your system, such as public users, agency users, and so on. This way, you can control the user experience for the various roles in your system.

1. Select **Branding > Assign Themes**.
2. On the Assign Themes page, locate the application theme to which you want to add a role-based theme.
3. Click **Edit**.
4. Click Add under Role-Based Assignment List.
5. For the role-based theme, specify these items:

Page Element	Description
<b>Priority</b>	In the case of multiple user roles assigned to a user, specify a priority between the role-based themes. The system applies the role-based theme with the lowest priority (closest to 1). For example, assume Role A Theme has a priority of 10, and Role_B_Theme has a priority of 20. In this case, if both of those roles are assigned to the current user, the system applies the Role_A_Theme.
<b>Role</b>	Select the user role to which this theme applies.

Page Element	Description
<b>Theme</b>	Select the branding theme to apply to the selected role.



6. Click **Save & Close**.

## Using Third Party Images Provided with Sample Data

The Oracle Permitting and Licensing offering includes sample data images that are provided under a restricted use license for demonstration purposes only.

The specific images are listed below along with their owner and media ID. If you want to use these sample images in a production environment, you must contact the image owners directly to purchase the images. You can find contact information for the owners in the Oracle Applications Cloud documentation: [Oracle Applications Cloud Licensing Information User Manual](#).

Oracle does not provide a license for you to use the sample images in your production environments or for other non-demonstration uses.

Image	Owner	Owner's Media ID for Image
	Getty	870535640
	Getty	168351010



# 4 Setting Up the Landing Pages and Agency Springboard

## Landing Pages Overview

The landing pages provide an initial entry point for all types users to access the pages they need.

There are three landing pages that the agency can configure: Agency Springboard, Anonymous User Landing Page, and Registered User Landing Page. This topic summarizes them and their purpose.

Page	Description
Agency Springboard	<p>Provides a starting point for agency staff to manage work. The Agency Springboard offers access to task lists and specific pages based on the user's role in the agency, from supervisors and accounting staff to planners, permit technicians, and inspectors.</p> <p>For more information about the elements on the Agency Springboard, see <a href="#">Setting Up the Agency Springboard</a>.</p>
Anonymous User Landing Page	<p>Also known as guests, anonymous users are residents, business owners, contractors, and so on, who have not signed in or are not registered. From the landing page, users can view an interactive map of the city, browse types of applications, start an application and access the Guide, which is a questionnaire users can fill out to find and save recommended application types for their project.</p> <p>For more information about the elements on the landing page for guests, see <a href="#">Setting Up the Landing Page for Anonymous Users</a>.</p>
Registered User Landing Page	<p>Registered users are residents, business owners, contractors, and so on, who are registered in the system. From the landing page for registered users, applicants can initiate applications, pay fees, view applications and details, request inspections, and manage their own user account.</p> <p>For more information about the elements on the landing page for applicants who are registered in the system, see <a href="#">Setting Up the Landing Page for Registered Users</a>.</p>

Agencies can configure the look and feel of the landing pages by changing these elements:

- Banner Image
- Welcome Message
- Summary Message
- Tile Labels
- Tile Image
- Color Theme for Background, Image Background, and Text of Each Section

For more information about setting up the landing pages, see [Branding Your Offering](#).

## Setting Up the Agency Springboard

You set up the Agency Springboard by defining the different elements on the page.

You can add these elements to the Agency Springboard by configuring the menu navigation attributes:

- Alerts banner
- Quick actions (I Want To) bar
- Task lists element
- Springboard area with tiles

For information about setting up the banner image see [Applying Branding Images](#).

For information about the global header and the page footer, see [Configuring Header and Footer Navigation Features](#).

### Defining Alerts for Agency Staff

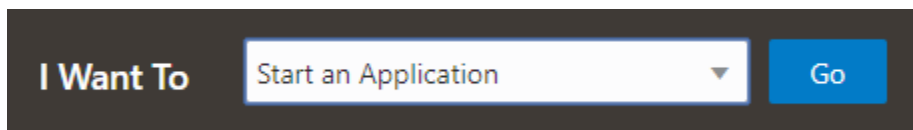
You can display alert messages on the Agency Springboard in an alerts banner.

For more information about setting up alerts messages, see [Defining Alerts](#).

### Configuring the Quick Actions Section

The quick actions section includes **I Want To** actions in a drop-down list on both the Registered User Landing Page and Agency Springboard. Each link provides access to relevant pages and functionality. You can show or hide the I Want To bar and include the link provided in the I Want To Content folder.

This example illustrates the quick actions element on the Agency Springboard.



**Note:** You can use the quick actions and tiles independently of each other or in combination. Both the quick actions and selected tiles access the same pages.

To show the quick actions section on the Agency Springboard:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Agency Springboard Data** folder.
5. Select the **I Want To** link:

Menu Link	Description
I Want To	Show available actions for agency staff in the quick actions drop-down list. These are the delivered actions that agency staff can access:

Menu Link	Description
	<ul style="list-style-type: none"> <li>○ <i>Start an Application</i>: Select to start an application behalf of a registered public user.</li> <li>○ <i>Estimate Fees</i>: Select to calculate an approximation of actual application fees.</li> <li>○ <i>Schedule an Inspection</i>: Select to open the supervisor Inspection List page, where you can schedule an inspection.</li> <li>○ <i>Report an Issue</i>: Select to report a code enforcement issue.</li> <li>○ <i>Pay Citation</i> Select to pay a code enforcement citation on behalf of a public user.</li> </ul> <p>The actions for agency staff and registered public users are determined by security setup.</p>

6. Select the desired menu item and click the **Edit** button.
7. On the Link Details page, go to the **Show On** field and select an option:
  - *All devices, Tablets and larger, or Smartphones only* - Displays the quick actions (I Want To) bar.
  - *None* - Hides the I Want To actions bar.

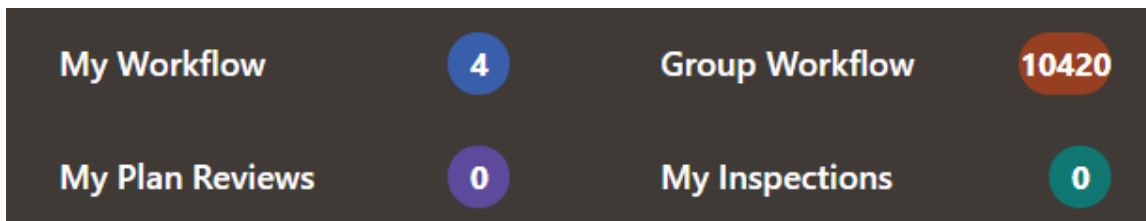
**Note:** When you configure the quick actions section to appear on the Agency Springboard, it also appears on the Registered User Landing Page.

8. Click **Close**.

## Configuring the Task List Element

The **Task List** element provides access to different lists of assigned tasks for agency staff.

This example illustrates the task list element on the Agency Springboard.



To show the **Task List** element on the Agency Springboard:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Agency Springboard Data** folder.
5. Select the Agency Task List link:

Menu Link	Description
<b>Agency Task List</b>	<p>Select to display the element that contains delivered links to the Task Management page, where a predefined filter is applied. The delivered links include:</p> <ul style="list-style-type: none"> <li>○ <b>My Workflow</b></li> <li>○ <b>Group Workflow</b></li> </ul>

Menu Link	Description
	<ul style="list-style-type: none"> <li>○ <b>My Plan Reviews</b></li> <li>○ <b>My Inspections</b></li> </ul> <p>A number appears next to the link to display the task count for the applied filter.</p> <p><b>Note:</b> The items that appear on the Agency Springboard are determined by the security roles assigned. For example, agency roles specific to the permits service display all of the items above, whereas, roles specific to the planning and zoning service do not display My Inspections or My Plan Reviews.</p>

6. Select the desired menu item and click the **Edit** button.
7. On the Link Details page, go to the **Show On** field and select an option:
  - *All devices, Tablets and larger, or Smartphones only* - Displays the Task List element.
  - *None* - Hides the Task List element.
8. Click **Close**.

## Configuring the Tiles on the Springboard

You can show or hide tiles, or modify the tile labels on the springboard, but you cannot delete delivered menu links. For more information about configuring tiles and the menu navigation, see [Configuring Menu Structure](#).

This example illustrates tiles on the Agency Springboard.



To configure the tiles on the springboard area of the Agency Springboard:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Agency Springboard Data** folder.
5. To create the springboard area for the tiles, click the **Agency Springboard** menu link.
6. Click the **Edit** button.

7. On the Link Details page, go to the **Show On** field and select an option:
  - o *None* - Hides the springboard area.
  - o *All devices, Tablets and larger, or Smartphones only* - Shows the springboard area.
8. To add individual tiles to the springboard, select from delivered menu links in a variety of folders.
9. Select the desired menu item and click the **Edit** button.
10. On the Link Details page, turn on the **Show on Springboard** switch.

For example, when you enable the **Show on Springboard** property for the **Parcel** menu link, the Parcel tile with a link to the associated page—the Parcel page—appears in the springboard area.

**Note:** The tile appears only on the Agency Springboard and not on any other landing pages when you select this option.

11. You can change the delivered label on the tile by editing the value in the **Label** field on the Link Details page.
12. Click **Close**.

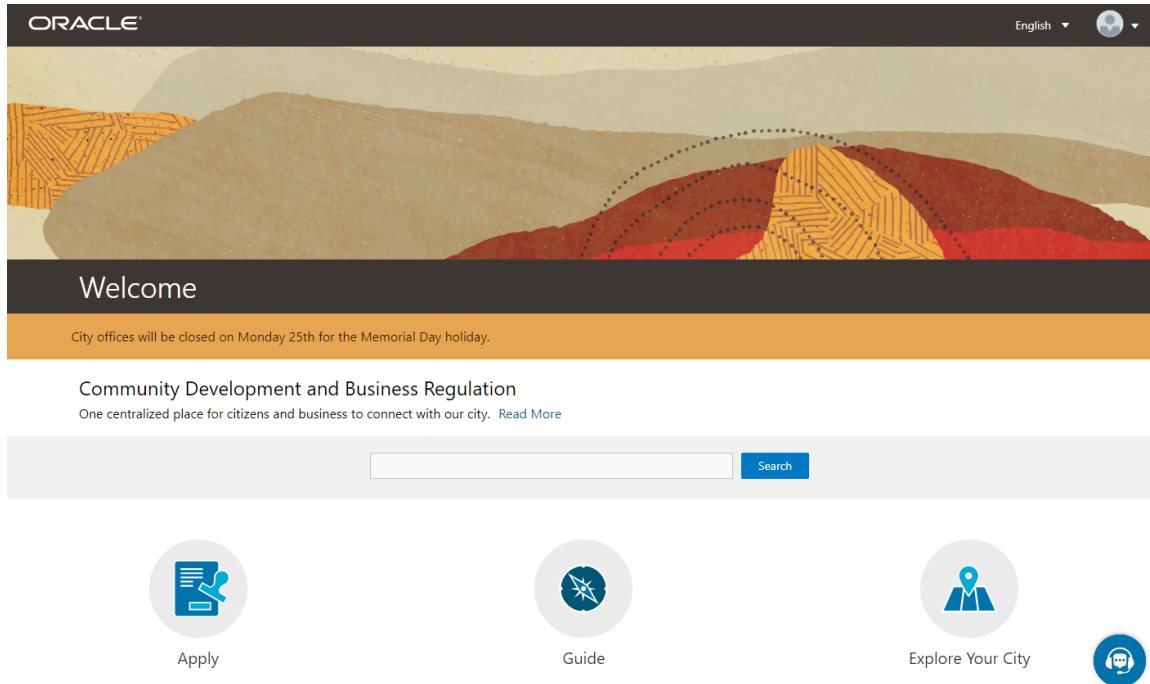
## Setting Up the Landing Page for Anonymous Users

You set up the landing page for anonymous or guest users by defining the different elements that help public users get information before they register.

You can configure these elements on the Anonymous User Landing Page:

- Banner image
- Welcome message
- Alerts banner
- Banner summary
- Search field
- Tiles

This example illustrates the elements on the Anonymous User Landing Page.



## Setting Up the Banner Image

You use the Oracle Fusion Application Appearance page to upload and store the branding images that you will use for your Public Sector system. For information about setting up the banner image see [Applying Branding Images](#).

## Setting Up the Welcome Message

You modify the Welcome Message with the other theme attributes. The Welcome Message is text in a large font and can simply be “Welcome,” as shown in the sample landing page. For more information, see [Managing Themes](#).

You enable the Welcome Message section using the Welcome menu link.

To enable the Welcome Message section in the menu navigation:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Anonymous Landing Page Data** folder.
5. Select the **Welcome** menu link:

Menu Link	Description
<b>Welcome</b>	Displays a section for the page title, such as <i>Welcome</i> , below the banner image. You can change the menu link label to display your choice of text.

6. Click the **Edit** button.
7. On the Link Details page, go to the **Show On** field and select an option:
  - o *None* - Hides the Welcome Message section.

- *All devices, Tablets and larger, or Smartphones only* - Shows the page title section.

**Note:** You must select an option to show on a device for the Welcome Message to appear, whether you define it at the branding level or here in the menu navigation configuration.

8. On the Link Details page, the text *Welcome* in the **Label** field is the default only when the Welcome Message hasn't been defined at the theme level.
9. Click **Close**.

## Setting Up the Banner Summary

You provide welcome information on the landing page for anonymous users and registered users in the banner summary element. You can also link to an external page from the banner summary.

For information about setting up welcome information, see *Defining Summary Details*.

## Defining Alerts

You display alert messages on the Anonymous User Landing Page in an alerts banner.

For information about setting up alert messages, see *Defining Alerts* and *Working with Ad Hoc Communications*.

## Setting Up the Global Search

You provide anonymous users with a search field that searches for transactions. This global search option searches for applications and projects by application number, application type, property address, description, or applicant.

**Note:** Search for registered users is only available in the global header. For information about the global header, see *Configuring Header and Footer Navigation Features*.

To set up the Search element on the Anonymous User Landing Page:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Anonymous Landing Page Data** folder.
5. Select the **Search** menu link:

Menu Link	Description
<b>Search</b>	Displays a search element under the banner summary.

6. Click the **Edit** button.
7. On the Link Details page, go to the **Show On** field and select an option:
  - *None* - Hides the search element.
  - *All devices, Tablets and larger, or Smartphones only* - Shows the search element.
8. Click **Close**.

## Managing Tiles on the Anonymous User Landing Page

You can show or make small modifications to tiles on the landing page for anonymous users, but you cannot delete delivered menu links. For more information about modifying tiles, see [Configuring Menu Structure](#).

To manage tiles on the Anonymous User Landing Page:

1. Select **Navigation Menu Configurations**
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Anonymous Landing Page Data** folder.
5. You can show or hide the delivered tiles:

Menu Link	Description
<b>Apply</b>	Provides a tile that links to the page where users can search for an application type and initiate an application.
<b>Applications</b>	Provides a tile for users to navigate to their saved applications. From the Anonymous User Landing Page, the user must log in before viewing saved applications.
<b>Guide</b>	<p>Provides a tile that links to a guided questionnaire used to find the type of application that the user needs for a particular project.</p> <p>This tile links to a questionnaire that you set up with Oracle Intelligent Advisor. See <a href="#">Choosing a Guide Questionnaire</a>.</p> <p><b>Note:</b> If your agency is not using Oracle Intelligent Advisor, you must hide this tile by selecting <i>None</i> in the <b>Show On</b> field for this menu link.</p>
<b>Explore Your City</b>	Provides a tile that links to a map where the guest user can search for and find property and application details.

6. On the Link Details page for a tile, you can change the tile image by selecting any delivered image from the **Icon** drop-down options.

## Setting Up the Landing Page for Registered Users

You set up the public landing page for registered users who have entered credentials to access the service.

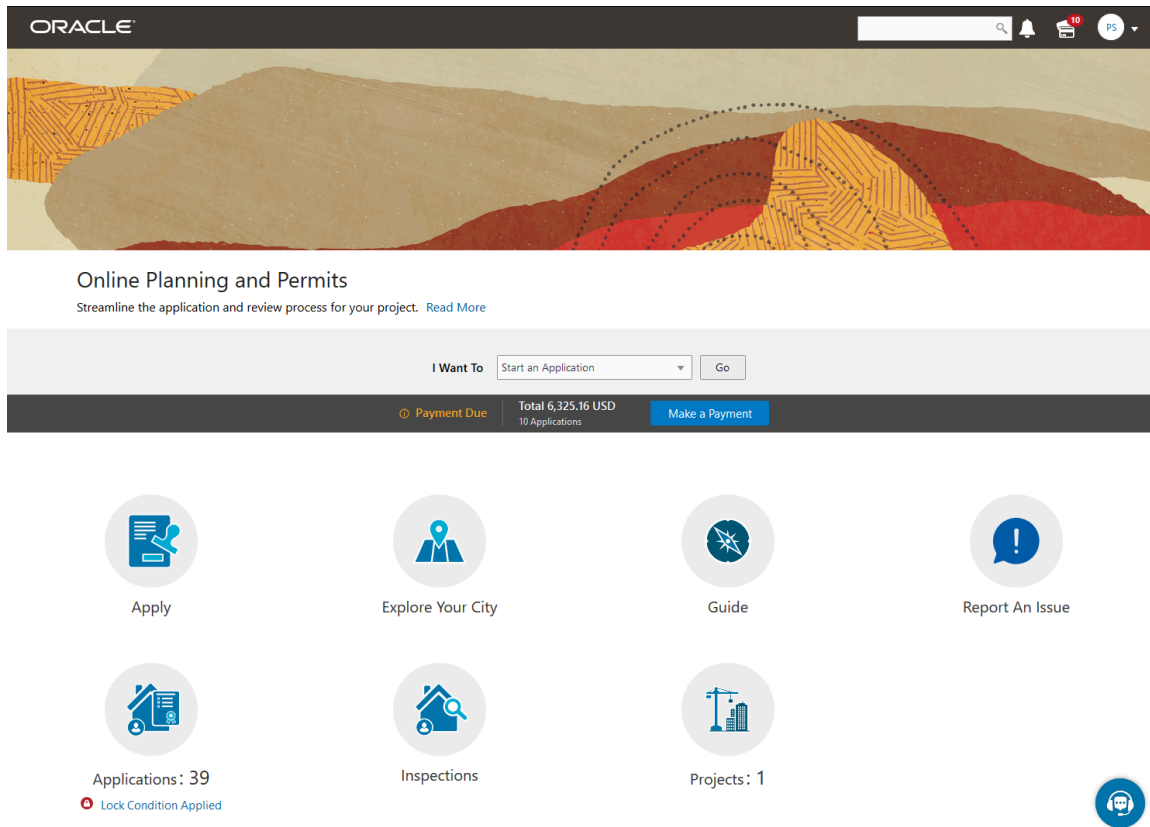
You can configure these elements on the Registered User Landing Page:

- Banner image



- Alerts banner
- Banner summary
- Quick actions (I Want To)
- Tiles

This example illustrates the Registered User Landing page.



## Setting Up the Banner Image

You use the Oracle Fusion Application Appearance page to upload and store the branding images that you will use for your Public Sector system. For information about setting up the banner image see [Applying Branding Images](#).

## Defining Alerts

You display alert messages on the Registered User Landing Page in an alerts banner.

For information about setting up alert messages, see [Defining Alerts](#) and [Working with Ad Hoc Communications](#).

## Setting Up the Banner Summary

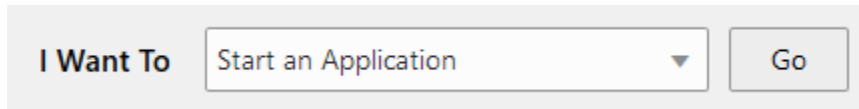
You provide welcome information on the landing page for anonymous users and registered users in the banner summary element. You can also link to an external page from the banner summary.

For information about setting up welcome information, see [Defining Summary Details](#).

## Configuring the Quick Actions Section

The quick actions section includes **I Want To** actions in a drop-down list on both the Registered User Landing Page and Agency Springboard. Each link provides access to specific pages and functionality. You can show or hide the I Want To bar and include the link provided in the I Want To Content folder.

This example illustrates the quick actions section, including the **I Want To** label, drop-down list, and **Go** button.



**Note:** You can use the quick actions and tiles independently of each other or in combination. Both the quick actions and selected tiles can access the same pages.

To show the quick actions section:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Agency Springboard Data** folder.
5. Select the **I Want To** menu link:

Menu Link	Description
<b>I Want To</b>	<p>Show available actions for registered users in the <b>I Want To</b> actions bar.</p> <p>A registered user can select from these actions:</p> <ul style="list-style-type: none"> <li>○ <i>Start an Application</i></li> <li>○ <i>Estimate Fees</i></li> <li>○ <i>Go to Applications</i></li> <li>○ <i>View Recommendations</i></li> <li>○ <i>Schedule an Inspection</i></li> <li>○ <i>View Payment History</i></li> <li>○ <i>View Invoice History</i></li> </ul> <p>The actions for agency staff and registered public users are determined by security setup.</p>

6. Select the desired menu item and click the **Edit** button.
7. On the Link Details page, go to the **Show On** field and select an option:
  - *All devices, Tablets and larger, or Smartphones only* - Displays the quick actions section.
  - *None* - Hides the quick actions section.

**Note:** When you configure the quick actions section to appear on the Agency Springboard, the section also appears on the Registered User Landing Page.

8. Click **Close**.

## Managing Tiles on the Registered User Landing Page

You can show or make small modifications to tiles on the landing page for registered users, but you cannot delete delivered menu links. For more information about modifying tiles, see [Configuring Menu Structure](#).

To manage tiles on the Registered User Landing Page:

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Use the menu links for the tiles in the **Anonymous Landing Page Data** folder.
5. You can show or hide the delivered tiles:
  - o Apply
  - o Applications
  - o Businesses
  - o Business Licenses
  - o Explore Your City
  - o Guide
  - o Inspections
  - o Projects
  - o Report an Issue

For more information about the tiles and their usage, see [Overview of Public Landing Pages](#).

6. On the Link Details page for a tile, you can change the tile image by selecting any delivered image from the **Icon** drop-down options.

## Choosing a Guide Questionnaire

You enter an Oracle Intelligent Advisor definition for the Guide questionnaire on the Permit Options page.

Use the Permit Options page during agency setup to specify the Oracle Intelligent Advisor ID to use for the Guide questionnaire. This questionnaire helps public users determine which application type is appropriate for a project. A single questionnaire provides guidance for all types of applications types, including types of permit application and types of planning applications.

Public users do not need to register before using the questionnaire.

Predefined Oracle Intelligent Advisor rules are delivered as samples, but using Oracle Intelligent Advisor is optional. If you do not use Oracle Intelligent Advisor, do not include the Guide tile on your landing pages.

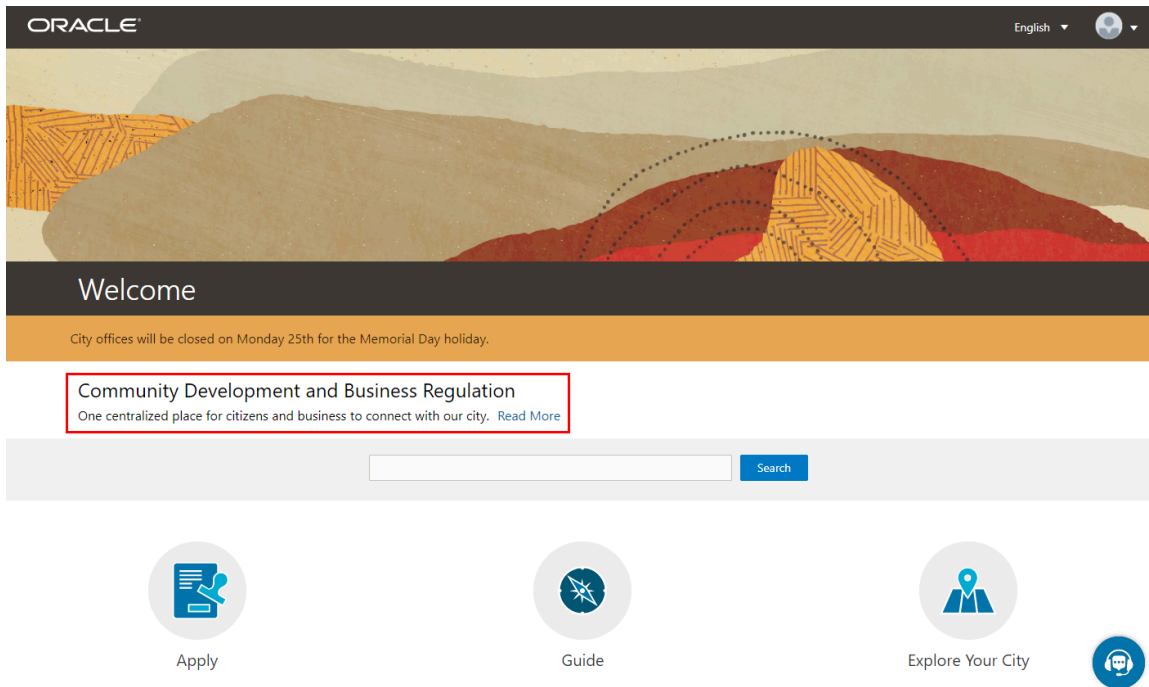
For instructions on associating an Oracle Intelligent Advisor ID with an agency, see [Managing Oracle Intelligent Advisor Policies for your Agency](#).

## Defining Summary Details

You set up the banner summary section on the public landing pages for anonymous and registered users by defining a summary title and text. You can also link to an agency page outside of the Oracle Permitting and Licensing Cloud.

The Banner Summary section includes a summary title and text as well as a **Read More** button that links to either a URL outside of the Oracle Permitting and Licensing Cloud or a longer message that you define. You define the summary details for the Banner Summary section in the menu navigation configuration and on the Permit Options page.

This example illustrates the Banner Summary section on a public user landing page..



## Setting Up Summary Details in the Menu Navigation Configuration

You set up summary details for the Anonymous User Landing Page and the Registered User Landing page in the menu navigation configuration. You must enable the **Online Planning and Permits** menu link for the Banner Summary section to appear on the landing pages.

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the **Anonymous Landing Page Data** folder.
5. Select the **Online Planning and Permits** menu link:

Menu Link	Description
<b>Online Planning and Permits</b>	Displays the summary title, summary text, and <b>Read More</b> button below the banner image. You can change the menu link label and description to display your choice of text.

Menu Link	Description

- Click the **Edit** button.
- On the Link Details page, update these fields:

Page Element	Description
<b>Show On</b>	<p>Select from these options:</p> <ul style="list-style-type: none"> <li>None - Hides the page title section.</li> <li>All devices, Tablets and larger, or Smartphones only - Shows the page title section.</li> </ul> <p><b>Note:</b> You must select an option to show on a device for the banner summary to appear, whether you define the summary details information here in the menu navigation configuration or in the agency setup.</p>
<b>Label</b>	Update the delivered title text.
<b>Description</b>	Update the delivered summary text, <i>Streamline the application and review process for your project.</i>

- Click **Close**.

## Setting Up Summary Details in the Permit Options Setup

You set up the summary title and text for the Anonymous User Landing Page and the Registered User Landing page on the Permit Options page during agency setup.

**Note:** You can define the summary details here in the agency setup or in the menu navigation configuration. But you must enable the **Online Planning and Permits** menu link in the navigation configuration for the banner summary to appear.

- Select **Common Setup > Agency**.
- Search and select your agency row to open the Agency Information – Details page.
- Click the Features tab.
- You will see that your offering is enabled; click the Options link on the row to open the Permit Options page.

- On the Permit Options page, enter values for the following fields in the **Landing Page Message Definition** section:

Page Elements	Usage
<b>Message Title</b>	Enter a short text version of the landing page message in a title format. If you leave this field blank, the value in the <b>Label</b> field on the Link Details page for the menu navigation link Online Planning and Permits is displayed.
<b>Message Summary</b>	Enter a longer version of the landing page message title in a sentence format. If you leave this field blank, the value in the <b>Description</b> field on the Link Details page for the menu navigation link Online Planning and Permits is displayed.
<b>Button Content URL</b>	<p>Enter a content URL for the <b>Read More</b> button. Public users click this button to access the agency's own additional information page, outside of the public sector system. If you leave this field blank, the <b>Read More</b> button opens a dialog box that displays the <b>Landing Page Message</b>.</p> <p><b>Note:</b> If you want to link to a page outside of the public sector system, you must enter a URL here.</p>
<b>Landing Page Message</b>	Enter information in rich text that appears in a dialog box when the user clicks the <b>Read More</b> button. If a URL to access the agency's page is defined, you don't need this message.

- Click **Save**.

## Defining Tiles

You define tiles by configuring a set of menu links that represent the tiles on landing pages and springboards.

The tiles and elements that you see on landing pages and springboards are treated as menu links that you configure during implementation. They give you access to specific pages and functionality within a product.

Your agency decides which tiles and elements to display on these home pages:

- Anonymous User Landing Page
- Registered User Landing Page
- Agency Springboard

You can open delivered menus and make minor changes to menu items to meet your agency needs.

For more information about managing menu items, see [Configuring Menu Structure](#).

## Modifying Tiles

You can make minor changes to tiles on the Link Details page for the selected tile. You can hide or rename tiles, but not delete them.

1. Click the menu link in the selected folder.
2. Click the **Edit** button.
3. On the Link Details page, you can make these changes:

Page Element	Description
<b>Label and Description</b>	Enter text for the tile label and description.
<b>Icon</b>	Select an icon for the tile from the available options in the drop-down list.
<b>Sequence</b>	Change the sequence or order in which the tile appears.
<b>Show On</b>	Select a device type from these options: <ul style="list-style-type: none"> <li>○ <i>All devices</i></li> <li>○ <i>Tablets and larger</i></li> <li>○ <i>Smart phones only</i></li> <li>○ <i>None</i></li> </ul>
<b>Show on Springboard</b>	Turn on the switch to display the tile with a link to an associated page on the Agency Springboard, which is for agency staff only. <p><b>Note:</b> The tile appears only on the Agency Springboard and not on any other landing pages when you select this option.</p>
<b>Show in Page Finder</b>	Turn on the switch to display the link in the Page Finder, which is a navigation feature accessed by agency staff by clicking the Page Finder button in the global header.

4. Click **Save and Close**.

## Defining Alerts

You can enable alerts for the Agency Springboard and public landing pages using ad hoc alerts or using certain delivered communication events.

You have multiple options for setting up alerts that appear on the public user landing pages and the agency springboard:

- Use the Communication Center to create an ad hoc alert.  
This is the preferred method. For step-by-step instructions, see [Working with Ad Hoc Communications](#).
- Use communication events, and create the alert using the delivered PSC\_GENERIC\_ALERT event.  
This topic provides step-by-step instructions for setting up an alert this way.

## Configuring the Agency Springboard and the Public User Landing Pages to Show Alerts

1. Select **Navigation > Menu Configurations**.
2. On the Configure Menu Structure page, select the *Products* menu.
3. Click **Open Menu**.
4. Expand the folder for the desired alert location:
  - **Agency Springboard Data**
  - **Anonymous Landing Page Data**
  - **Registered Landing Page Data**
5. Select the **Alerts** item in the folder.
6. On the Link Details page, change the **Show On** field to *All devices*.
7. Click **Save and Close**.

## Adding Alerts Using Delivered Events

For general information about working with events, see [Setting Up Communication Templates](#).

1. Select **Communication Setup > Communication Events**.
2. Locate the PSC\_GENERIC\_ALERT event row for general alerts and click the row to open the Communication Event Details page.
3. Click the **Add** button in the **Communication Template** section.
4. On the Communication Template Details page, select *Alert* in the **Channel Type** field. The page refreshes to show the fields required for defining an alert.
5. In the **Template Attributes** section, enter information for the required fields:

Page Element	Description
<b>Code and Name</b>	Enter a code and descriptive name for the alert.
<b>Start Date Time and End Date Time</b>	Enter when the alert is valid, including when to start and when to stop showing the alert.
<b>Enabled</b>	Turn on the switch to activate the alert.

6. In the **Compose** section, enter information in these fields:



Page Element	Description
<b>To</b>	<p>Enter a value that identifies the target recipients:</p> <ul style="list-style-type: none"> <li>○ Individual Registered Users</li> </ul> <p>Enter comma-separated user IDs for the registered users, for example, <b>SYSTEM_ADMIN, BUSINESS_ANALYST</b>.</p> <ul style="list-style-type: none"> <li>○ All Registered Users</li> </ul> <p>Enter this attribute: <b>#{User}</b>. The Communication Alerts framework provides the alert information when the registered user logs in.</p> <ul style="list-style-type: none"> <li>○ All Anonymous Users</li> </ul> <p>Enter this attribute: <b>#{Anonymous}</b>.</p> <ul style="list-style-type: none"> <li>○ A Combination of Users</li> </ul> <p>Enter a string including comma-separated user IDs for the registered users, <b>#{User}</b> for all registered users, and <b>#{Anonymous}</b> for all anonymous users.</p>
<b>Message Body</b>	<p>Compose the message for your alert here. For the <i>Alert</i> channel type, you can enter only plain, unformatted text.</p>
<b>Select and Insert</b>	<p>Insert variable attributes into your communications. 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>To</i> field and the <i>Anonymous</i> attribute, and click <b>Insert</b>, the <b>#{Anonymous}</b> variable is inserted into the <b>To</b> field of the communication template.</p>
<b>Remarks</b>	<p>Enter any additional information about the communication. These remarks are not included in the generated communication.</p>

7. Click **Save** to return to the Communication Event Details page.
8. On the Communication Event Details page, turn on the **Enabled** switch.
9. Click **Save**.

## Modifying Alerts

1. Select **Communication Setup > Communication Events**.
2. Locate the row to be modified (either the PSC\_GENERIC\_ALERT row or the ADHOC-EVENT event row), and click the row to open the Communication Event Details page.
3. In the **Communication Template** section, click the row for the alert you want to modify.
4. On the Communication Template Details page, you can enable or disable the alert message, change the recipient of the alert in the **To** field, and update the message text in the message body.
5. Click **Save**.
6. On the Communication Event Details page, you can turn on or turn off the **Enabled** switch.
7. Click **Save**.



# 5 Setting Up Help Management

## Setting Up Contextual Help

Contextual help provides customized guidance for users at the page, section, and field level. Contextual help content is stored in your database and accessed through icons that appear on the associated pages.

You add, modify, and delete contextual help entries on the Contextual Help page.

**Note:** Use the Contextual Help page to create contextual help for static pages delivered by Oracle. You can also create contextual help using the Intake Form Designer. For more information, see [Adding Contextual Help to Forms](#).

### Adding a Contextual Help Entry

1. Select **Help Management > Contextual Help**.
2. On the Contextual Help page, click **Add**.
3. On the Contextual Help page, enter values for the following fields:

Page Element	Description
Type Code	Enter a unique identifier for the contextual help entry.
Page Name	Enter the name of the page for which you are adding contextual help.
Page Object	Enter the page element for which you are adding contextual help.
Description	Enter a description of the contextual help entry.

4. Add contextual help details.
5. Click **Save**.

### Adding Contextual Help Details

1. On the Contextual Help page, click **Add**.
2. On the Add Contextual Help Details page, enter values for the following fields:

Page Element	Description
Enabled	Click to make this contextual help content available on the associated page.
Help Content	Enter the contextual help content using formatted text, images, and links.

Page Element	Description

3. Click **Save**.

## Modifying a Contextual Help Entry

1. Select **Help Management > Contextual Help**.
2. Click a row on the Contextual Help page.
3. On the Contextual Help page you can:
  - o Update the contextual help description.
  - o Add, modify, or delete contextual help details.
4. Click **Save**.

## Modifying Contextual Help Details

1. Click a contextual help details row on the Contextual Help page.
2. On the Contextual Help Details page you can:
  - o Disable the help content. Disabled help content no longer appears for the associated page.
  - o Edit the contextual help content.
  - o Delete the help details. You will be prompted to confirm the permanent deletion.

**Note:** You can modify and delete only agency-defined contextual help details.

3. Click **Save**.

## Deleting Contextual Help Details

1. Click **Edit** for the Contextual Help Details grid on the Contextual Help Details page.
2. Select the check boxes next to all the rows of help details you want to delete.
3. Click **Delete**. You will be prompted to confirm the permanent deletion.

**Note:** You can delete only agency-defined contextual help details.

# 6 Setting Up Digital Assistant

## Initializing the Digital Assistant

Digital assistants are virtual devices that help users accomplish tasks by conducting conversations using a textual method. Public users can seek general information or ask specific questions through the digital assistant interface. The digital assistant evaluates the user input and responds with the help of appropriate skills.

Skills are individual assistants that are designed to respond to specific types of tasks. Each skill helps users complete a task through a combination of text messages and select lists.

For a detailed understanding of digital assistants and their skills, see the documentation [Overview of Digital Assistants and Skills](#).

## Generating the Channel ID

The initial steps in setting up your digital assistant is to access your Oracle Digital Assistant instance and generate your unique channel ID. To generate the channel ID:

- Create primary digital assistant
- Add skills such as the delivered samples:
  - Permit Search Skill Bot
  - Permit Recommendations Skill Bot
- Create an Oracle Web type channel
- Copy the channel ID

Refer to the documentation [Create, Version, and Publish Digital Assistants](#) for the steps to create a digital assistant and to add a skill. Once you create or add an existing skill:

1. Create a channel of the type Oracle Web using the Create Channel page and then enable the channel for use.
2. Copy the channel ID value generated in the **Channel ID** field.

## Configuring the Digital Assistant Parameters

You set up your digital assistant based on how you want your users to see the digital assistant interface.

To set up your digital assistant:

1. Access your Digital Assistant setup page using the navigator.

2. Enter values for the following fields to determine how the digital assistant interface appears to your users:

Page Element	Description
<b>Channel ID</b>	Enter the value you generated using your primary digital assistant, as documented in the <i>Initializing the Digital Assistant</i> section.
<b>Header</b>	Enter text that should appear in the widget header. For example, Chatbot.
<b>Text Entry</b>	Enter a text to indicate to the user where to enter their question. Example, <i>Enter your question here.</i>
<b>Send Button</b>	Enter a text to indicate to the user that they should click the button after entering their question. Examples include <i>Ask</i> and <i>Send</i> .
<b>Custom Options</b>	Enter custom options to customize the strings used and other behavior in the widget user interface.

3. Click **Save**.

For a detailed description on configuring the digital assistant parameters, see the Fusion documentation *Personalize your Digital Assistant*.